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# The Travel & Tourism Competitiveness Report 2007

Furthering the Process of Economic Development

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**Jennifer Blanke**, World Economic Forum

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Editors



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The terms *country* and *nation* as used in this report do not in all cases refer to a territorial entity that is a state as understood by international law and practice. The terms cover well-defined, geographically self-contained economic areas that may not be states but for which statistical data are maintained on a separate and independent basis.

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# Preface

**KLAUS SCHWAB,**

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The World Economic Forum has been actively engaged in studying issues related to national competitiveness for nearly three decades, motivated by a desire to better understand the drivers of growth and prosperity. Over the years, our goal has been to provide benchmarking tools that enable countries to identify key obstacles to competitiveness, and to provide a platform for dialogue among government, business, and civil society to discuss the best ways of removing them. In this light, given the importance of the Travel & Tourism (T&T) industry to the world economy, the fundamental objective of the *Travel & Tourism Competitiveness Report* (TTCR) is to explore the factors driving T&T competitiveness worldwide.

Travel & Tourism is currently one of the world's largest economic activities. It is the leading industry in many countries, as well as the fastest growing economic sector in terms of job creation worldwide. In 2006, the sector generated 10.3 percent of world gross domestic product (GDP), providing 234 million jobs, or 8.2 percent of total world employment.

The economic significance and potential of Travel & Tourism is particularly prominent in the developing world. Most new jobs in developing economies are created in tourism industries. In addition, Travel & Tourism helps diversify economic activity and enables the creation of wealth and jobs in rural areas.

The industry also triggers important indirect development effects that improve the quality of life of citizens and enhance a country's overall economic prospects. The desire to improve the national environment for Travel & Tourism encourages governments to make infrastructure improvements such as better roads, electricity, telephone, and public transport networks. Furthermore, the industry contributes positively in raising cultural awareness and enhancing environmental sustainability.

Recognizing the important development potential of this industry, the World Economic Forum has engaged a number of industry and thought leaders through its Industry Partnership Programme to carry out an in-depth analysis of the T&T competitiveness of economies around the world. The goal is to construct a platform for multi-stakeholder dialogue to ensure the development of strong and sustainable national T&T industries capable of contributing effectively to international economic development.

Drawing on our expertise in developing tools for measuring national competitiveness, the World Economic Forum has developed the first Travel & Tourism

Competitiveness Index (TTCI), which is at the core of this *Report*. The aim of the TTCI, which covers 124 economies, is to provide a comprehensive strategic tool for measuring “the factors and policies that make it attractive to develop the Travel & Tourism sector in different countries.” By providing detailed assessments of the T&T environments in countries worldwide, the results can be used by all stakeholders to work together to improve the industry's competitiveness in their national economies, thereby contributing to national growth and prosperity.

The *Report* contains detailed profiles for each of the 124 economies featured in the study, as well as an extensive section of data tables with global rankings covering all of the indicators included in the TTCI. In addition, the *Report* includes insightful contributions from a number of industry organizations and firms. These essay contributions examine the different aspects of T&T competitiveness, exploring issues such as the relationship between Travel & Tourism and economic development, the role of electronic payments in driving tourism and growth, and the economic impact of improving air transport networks.

The *Travel & Tourism Competitiveness Report* could not have been put together without the distinguished thinkers who have shared with us their knowledge and experience. We are grateful to our Strategic Design Partner, Booz Allen Hamilton, and our Data Partners: the International Air Transport Association (IATA), the World Tourism Organization (UNWTO) and the World Travel & Tourism Council (WTTC) for helping us to design and develop the TTCI and for providing much of the industry-relevant data used in its calculation. We thank our industry partners in this *Report*—Bombardier, Carlson, Emirates Group, Qatar Airways, Royal Jordanian Airlines, Silversea Cruises Group, Swiss International Airlines, and Visa International—for their support in this important venture. We also wish to thank the editors of the *Report*, Jennifer Blanke and Thea Chiesa, for their energy and their commitment to the project. Appreciation also goes to Fiona Paua, who leads the Global Competitiveness Network, and the other members of the team: Ciara Browne, Margareta Drzeniek, Thierry Geiger, Irene Mia, and Aviva Rajczyk. Finally, we would like to convey our sincere gratitude to all the business executives around the world who took the time to participate in our Executive Opinion Survey, and whose valuable input made the publication of this *Report* possible.





# Executive Summary

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Since 1979, the World Economic Forum has been at the forefront of national competitiveness research. Our competitiveness work is aimed at contributing to a better understanding of why some countries grow prosperous, while others are left behind. Given the Forum's long-standing interest in economic development, coupled with the growing importance of Travel & Tourism (T&T) for national economies, a study focusing on the T&T industry is extremely relevant. In this context, *The Travel & Tourism Competitiveness Report* aims to explore the factors and policies driving travel and tourism competitiveness in nations worldwide.

The measurement of national T&T competitiveness is an important undertaking, as it has become a key sector in the world economy and is a critical source of economic growth and development in many countries. Between 1950 and 2004, international tourism receipts increased from US\$2.1 billion to US\$622.7 billion;<sup>1</sup> by 2006, the T&T sector accounted for 10.3 percent of world GDP. In the same year, there were 234 million jobs in the industry, making up 8.2 percent of total employment worldwide.<sup>2</sup> The rising economic importance of the industry has been fueled by the large and growing number of international travelers. According to the World Tourism Organization (UNWTO), the number of international arrivals grew from 25 million in 1950 to an estimated 763 million in 2004, corresponding to an average annual growth rate of 6.5 percent.<sup>3</sup>

Travel & Tourism is thus one of the most important international economic activities internationally, and the main industry in many countries, as well as the fastest-growing economic sector in terms of foreign exchange earnings and job creation, according to the UNWTO. The sector is an important driver of growth and prosperity and, within developing countries, for poverty reduction. In fact, according to the World Travel & Tourism Council (WTTC), most new jobs in developing countries are created in tourism industries.<sup>4</sup>

The sector also has important indirect positive development effects. It encourages governments to make infrastructure improvements such as better roads, electricity, telephone, and public transport networks, which, as well as facilitating tourism, improve the economy's overall development prospects and the quality of life for its residents.

The dependence of tourism on the quality of the natural environment also places it in a special position in terms of environmental sustainability. The T&T industry

can make a positive contribution to the quality of the natural environment by, for example, communicating the value of the natural environment to residents, by creating business incentives for environmental improvements, and through raising awareness of environmental issues and encouraging tourists to advocate environmental conservation.<sup>5</sup>

Given these potential significant benefits of fostering strong national T&T sectors worldwide, the World Economic Forum has embarked on an effort to better understand the drivers of T&T competitiveness and the challenges that face the industry at the present time. This *Report* is the first in what we expect to be an annual series dedicated to this effort.

A principal aim of this *Report* is to measure the competitiveness of individual economies' T&T competitiveness, using the comprehensive vehicle that has been developed for this purpose, the Travel & Tourism Competitiveness Index (TTCI), described in more detail below. The TTCI was produced by the World Economic Forum in close collaboration with Booz Allen Hamilton, the International Air Transport Association (IATA), the UNWTO, and the WTTC. We have also received important feedback from a number of key companies that are industry partners in the effort: Bombardier, Carlson, Emirates Group, Qatar Airways, Royal Jordanian Airlines, Silversea Cruises, Swiss International Airlines, and Visa International. Several thought leaders from these companies and organizations have also contributed insightful papers addressing various aspects of T&T competitiveness, which are described following the section on the TTCI below.

## The Travel & Tourism Competitiveness Index

The Travel & Tourism Competitiveness Index (TTCI), described in Chapter 1.1, aims to measure *the factors and policies that make it attractive to develop the T&T sector in different countries*. The TTCI is composed of a number of "pillars" of T&T competitiveness, of which there are 13 in all. These are:

1. *Policy rules and regulations*
2. *Environmental regulation*
3. *Safety and security*
4. *Health and hygiene*
5. *Prioritization of Travel & Tourism*
6. *Air transport infrastructure*

7. *Ground transport infrastructure*
8. *Tourism infrastructure*
9. *ICT infrastructure*
10. *Price competitiveness in the T&T industry*
11. *Human resources*
12. *National tourism perception*
13. *Natural and cultural resources*

The pillars are organized into three subindexes capturing broad categories of variables that facilitate or drive T&T competitiveness. These categories are (1) T&T regulatory framework, (2) T&T business environment and infrastructure, and (3) T&T human, cultural, and natural resources. The first subindex captures those elements that are policy related and generally under the purview of the government (policy rules and regulations, environmental regulation, safety and security, and prioritization of Travel & Tourism); the second subindex captures elements of the business environment and the infrastructure of each economy (air transport infrastructure, ground transport infrastructure, tourism infrastructure, ICT infrastructure, and price competitiveness); and the third subindex captures the human and cultural elements of each country's resource endowments (human capital, national tourism perception, and natural and cultural resources).

Each of the pillars is made up of a number of individual variables. The dataset includes both hard data and Survey data from the World Economic Forum's annual Executive Opinion Survey. The hard data were obtained from publicly available sources, international T&T institutions, and T&T experts (for example, IATA, ICAO, UNWTO, WTTC, UNESCO). The Survey is carried out among CEOs and top business leaders in all economies covered by our research—these are the people making the investment decisions in their respective economies. The Survey provides unique data on many qualitative institutional and business environment issues. The exact methodology underlying the construction of the TTCI is described in Chapter 1.1.

### The TTCI Rankings for 2007

The rankings from the TTCI for the 124 countries covered in this year's *Report* are presented in Table 1, with the rankings in each of the three subindexes. Tables 2, 3 and 4 show the rankings within each subindex and individual pillar.

Switzerland takes the leading position in the TTCI rankings, followed closely by Austria and Germany. Switzerland owes its position at the top to strengths in all areas covered by the Index. As is well known, Switzerland is an extremely safe country, with excellent health and hygiene indicators, as well as environmental regulation that is among the most stringent and effective in the world. And in a country that has some of the most well regarded hotel management schools in the

world, the quality of the country's human resources is second to none, ensuring an adequate supply of high-quality staff for the industry. The T&T infrastructure is also among the best in the world, making it very easy and comfortable for visitors to move around the country. Further, the country's natural and cultural resources are among the richest in the world. Switzerland is home to six World Heritage sites, a significant number for such a small country, and nearly 30 percent of the land area in the country is protected. Given the importance of policy in driving T&T competitiveness, it is also notable that Switzerland is one of the only high-income countries, together with Spain, that is among the top 10 countries with regard to the prioritization of Travel & Tourism. All of this comes together to make Switzerland a very attractive place to develop the T&T sector.

Austria and Germany, ranked 2nd and 3rd, respectively, share a number of characteristics with regard to their own T&T environments. For example, both countries are among the top three countries, together with Denmark, in the quality of environmental regulation, and they are among the top four in terms of safety and security in the country, with very low crime and violence and reliable police services. Most strikingly they hold the top two spots in natural and cultural resources, ranks attributable to several World Heritage sites in both countries (especially in Germany) and large protected national parks and such areas. But there are some nuances. For example, Germany is rated as doing better with regard to the quality of transport infrastructure, particularly ground transport infrastructure, where it is rated number 1, whereas Austria's tourism-specific infrastructure is rated as the best in the world, ahead of Germany. And Austria also outperforms Germany quite strongly in the prioritization of Travel & Tourism by the country.

The United States is ranked 5th in the Index. It is among the top three of the 124 economies covered regarding natural and cultural resources, with a large number of World Heritage sites (20 of them), as well as much protected land area, making the country an attractive destination. The country also has an excellent infrastructure and business environment for Travel & Tourism, ranked number 1 in the overall subindex: it has the most well developed air transport infrastructure in the world, by a significant margin, as well as excellent tourism infrastructure. The country's human resources also get excellent marks (ranked 5th overall). It should be noted, however, that hiring foreign labor is highlighted as difficult (ranked 43rd). This is an area of concern because of the seasonality of much of the tourism labor force.

France, the most-traveled-to destination in the world, is ranked just outside the top 10 at 12th place. The country's strengths lie in areas such as natural and cultural resources (with, for example, 30 World Heritage sites, among the highest in the world), the quality of the air and ground transport infrastructures (both ranked 4th),

and health and hygiene (9th). However, these strengths are offset by weaknesses such as the country's policy rules and regulations (ranked 40th), and, most particularly, issues related to national tourism perception, particularly the general attitude of the French toward visitors (ranked a very low 122nd overall).

Spain, a country that has seen an impressive increase in tourism over the years, is ranked 15th overall, just behind France within Europe. Spain's strengths can be traced to its excellent tourism infrastructure (ranked 2nd) and air transport infrastructure (ranked 7th), as well as excellent natural and cultural resources (with the second highest number of World Heritage sites in the world, second only to Italy). And Spain is notably ranked 3rd overall with regard to the prioritization of the T&T sector by the country, the top-ranked European country in this area, demonstrating the recognition within Spain of the importance of the sector as an important driver of economic growth.

Italy, the country with the highest number of World Heritage sites in the world, ranks a mediocre 33rd in the TTCI ranking. The country is strongly assessed for its cultural aspects and its very good tourism infrastructure. However, Italy's T&T competitiveness suffers from several weaknesses, which bring the overall rating down. These include policy rules and regulations, where it ranks a dismal 70th—below most European countries because of its very strong foreign ownership restrictions and rules governing FDI. Further, the government is not seen to be prioritizing the sector (ranked 92nd).

Within Asia, Hong Kong is measured as the economy with the strongest T&T competitiveness (ranked 6th overall), followed closely by Singapore (8th). These economies have excellent infrastructures: both their ground transport infrastructures are assessed as among the top three in the world, and their air transport infrastructures also get high marks. They also have top-notch human resources, providing healthy and well-educated people to work in the sector. With regard to the policy environment, they hold the top two places out of all economies, with regulatory environments that are extremely conducive to the development of the T&T industry (policies facilitating foreign ownership and foreign direct investment, well-protected property rights, few visa restrictions). Further, they are among the safest countries of all assessed with regard to crime and security issues. Hong Kong is unsurpassed in the quality of health and hygiene, and Singapore is ranked second in the overall prioritization of Travel & Tourism.

Australia is ranked 13th overall, just ahead of New Zealand (14th). Both countries are characterized by excellent natural and cultural resources, with much nationally protected land area and, in the case of Australia, many World Heritage sites as well (16, placing the country 12th). And given the importance of the natural environment for much of their leisure tourism, it is notable that they also have comparatively stringent

environmental regulations, which are aimed at ensuring that this remains a sustainable strength. Further, both countries are characterized by a relatively strong prioritization of the T&T sector and effective destination marketing campaigns.

Malaysia, ranked 31st, has good ground transport infrastructure and excellent price competitiveness—it is ranked 2nd overall on this indicator, with very low ticket taxes and airport charges, low comparative fuel prices, and a favorable tax regime. The country is perceived as quite safe (24th), although health and hygiene indicators lag behind many other countries in the region, with in particular a low physician density. The country's policy environment is measured as relatively conducive to the development of the sector (ranked 26th), and the government is prioritizing Travel & Tourism, with one of the highest T&T fair attendances in the world (ranked 2nd) and an excellent evaluation for its destination marketing campaigns (ranked 6th).

Thailand is ranked 43rd in the TTCI, just behind Korea (ranked 42nd). Thailand benefits from a very friendly attitude toward tourists (ranked 6th), and the sector is indeed prioritized by the government (ranked 14th) with excellent destination marketing campaigns and an effort to ensure national presence at major travel and tourism fairs internationally. However, important weaknesses remain, particularly regarding the quality of transport and tourism infrastructure, both of which remain relatively underdeveloped.

India is ranked 65th overall. The country has some clear strengths, linked mainly to cultural endowments. It ranked a very high 7th overall with regard to the number of World Heritage sites in the country, and it also benefits from a famously welcoming attitude toward foreign travelers. The country also benefits from excellent price competitiveness, ranked 6th overall, with very low ticket taxes and airport charges as well as low prices in the economy as a whole. With regard to the policy environment, property rights are indeed well protected and foreign ownership is authorized, although the stringency of visa requirements places India a very low 106th overall. However, the tourism infrastructure remains underdeveloped. Furthermore, despite government and industry efforts to promote the country abroad (India is ranked 4th with regard to tourism fair attendance) and the exposure given to recent promotional campaigns, the assessment of marketing and branding to attract tourists remains mediocre (ranked 59th).

China is ranked 71st in the TTCI. Although China is ranked 3rd in terms of World Heritage sites and 11th in terms of price competitiveness, it has a policy environment that is not at all conducive for T&T development (ranked a low 97th), with property rights that are not sufficiently protected, strong foreign ownership restrictions, and stringent visa requirements. Environmental regulation also gets low marks, with the government not seen to be prioritizing the development of the sector in

**Table 1: The Travel & Tourism Competitiveness Index**

| Country/Economy       | SUBINDEXES    |       |                      |       |                                         |       |                                        |       |
|-----------------------|---------------|-------|----------------------|-------|-----------------------------------------|-------|----------------------------------------|-------|
|                       | OVERALL INDEX |       | Regulatory framework |       | Business environment and infrastructure |       | Human, cultural, and natural resources |       |
|                       | Rank          | Score | Rank                 | Score | Rank                                    | Score | Rank                                   | Score |
| Switzerland           | 1             | 5.66  | 2                    | 5.80  | 2                                       | 5.36  | 2                                      | 5.81  |
| Austria               | 2             | 5.54  | 3                    | 5.79  | 12                                      | 4.97  | 1                                      | 5.86  |
| Germany               | 3             | 5.48  | 6                    | 5.62  | 3                                       | 5.23  | 6                                      | 5.61  |
| Iceland               | 4             | 5.45  | 5                    | 5.69  | 8                                       | 5.04  | 5                                      | 5.61  |
| United States         | 5             | 5.43  | 33                   | 5.06  | 1                                       | 5.74  | 12                                     | 5.50  |
| Hong Kong SAR         | 6             | 5.33  | 4                    | 5.75  | 14                                      | 4.81  | 14                                     | 5.44  |
| Canada                | 7             | 5.31  | 15                   | 5.31  | 4                                       | 5.22  | 16                                     | 5.40  |
| Singapore             | 8             | 5.31  | 1                    | 5.81  | 11                                      | 5.01  | 42                                     | 5.11  |
| Luxembourg            | 9             | 5.31  | 17                   | 5.28  | 9                                       | 5.04  | 8                                      | 5.60  |
| United Kingdom        | 10            | 5.28  | 21                   | 5.20  | 6                                       | 5.08  | 10                                     | 5.58  |
| Denmark               | 11            | 5.27  | 8                    | 5.46  | 16                                      | 4.76  | 9                                      | 5.59  |
| France                | 12            | 5.23  | 13                   | 5.34  | 5                                       | 5.10  | 28                                     | 5.27  |
| Australia             | 13            | 5.21  | 16                   | 5.28  | 10                                      | 5.04  | 26                                     | 5.30  |
| New Zealand           | 14            | 5.20  | 10                   | 5.44  | 20                                      | 4.57  | 7                                      | 5.60  |
| Spain                 | 15            | 5.18  | 25                   | 5.15  | 7                                       | 5.05  | 19                                     | 5.34  |
| Finland               | 16            | 5.16  | 7                    | 5.61  | 18                                      | 4.68  | 33                                     | 5.18  |
| Sweden                | 17            | 5.13  | 19                   | 5.25  | 13                                      | 4.88  | 27                                     | 5.27  |
| United Arab Emirates  | 18            | 5.09  | 18                   | 5.28  | 19                                      | 4.68  | 24                                     | 5.31  |
| Netherlands           | 19            | 5.08  | 22                   | 5.17  | 15                                      | 4.77  | 25                                     | 5.30  |
| Cyprus                | 20            | 5.07  | 29                   | 5.09  | 23                                      | 4.50  | 3                                      | 5.62  |
| Belgium               | 21            | 5.07  | 24                   | 5.16  | 29                                      | 4.41  | 4                                      | 5.62  |
| Portugal              | 22            | 5.05  | 11                   | 5.40  | 22                                      | 4.50  | 30                                     | 5.23  |
| Norway                | 23            | 5.04  | 9                    | 5.45  | 21                                      | 4.56  | 40                                     | 5.12  |
| Greece                | 24            | 4.99  | 20                   | 5.21  | 32                                      | 4.36  | 15                                     | 5.41  |
| Japan                 | 25            | 4.99  | 28                   | 5.10  | 17                                      | 4.71  | 38                                     | 5.15  |
| Malta                 | 26            | 4.96  | 23                   | 5.16  | 31                                      | 4.37  | 21                                     | 5.33  |
| Ireland               | 27            | 4.93  | 14                   | 5.32  | 26                                      | 4.44  | 46                                     | 5.03  |
| Estonia               | 28            | 4.90  | 32                   | 5.07  | 25                                      | 4.45  | 34                                     | 5.18  |
| Barbados              | 29            | 4.86  | 31                   | 5.08  | 36                                      | 4.14  | 17                                     | 5.38  |
| Taiwan, China         | 30            | 4.82  | 45                   | 4.73  | 28                                      | 4.43  | 23                                     | 5.32  |
| Malaysia              | 31            | 4.80  | 27                   | 5.12  | 27                                      | 4.44  | 57                                     | 4.84  |
| Israel                | 32            | 4.80  | 36                   | 4.93  | 33                                      | 4.28  | 35                                     | 5.18  |
| Italy                 | 33            | 4.78  | 42                   | 4.77  | 30                                      | 4.38  | 32                                     | 5.18  |
| Tunisia               | 34            | 4.76  | 12                   | 5.34  | 47                                      | 3.77  | 37                                     | 5.15  |
| Czech Republic        | 35            | 4.75  | 40                   | 4.80  | 37                                      | 4.13  | 22                                     | 5.32  |
| Qatar                 | 36            | 4.71  | 34                   | 5.04  | 39                                      | 4.10  | 49                                     | 4.99  |
| Slovak Republic       | 37            | 4.68  | 37                   | 4.86  | 45                                      | 3.81  | 18                                     | 5.37  |
| Croatia               | 38            | 4.66  | 58                   | 4.37  | 40                                      | 4.06  | 11                                     | 5.55  |
| Mauritius             | 39            | 4.63  | 35                   | 4.96  | 46                                      | 3.77  | 39                                     | 5.15  |
| Hungary               | 40            | 4.61  | 26                   | 5.15  | 51                                      | 3.71  | 51                                     | 4.98  |
| Costa Rica            | 41            | 4.60  | 39                   | 4.80  | 52                                      | 3.66  | 20                                     | 5.34  |
| Korea, Rep.           | 42            | 4.58  | 46                   | 4.61  | 24                                      | 4.46  | 73                                     | 4.67  |
| Thailand              | 43            | 4.58  | 41                   | 4.78  | 35                                      | 4.14  | 59                                     | 4.82  |
| Slovenia              | 44            | 4.58  | 44                   | 4.74  | 38                                      | 4.11  | 53                                     | 4.88  |
| Chile                 | 45            | 4.58  | 38                   | 4.83  | 42                                      | 3.87  | 47                                     | 5.03  |
| Jordan                | 46            | 4.52  | 30                   | 5.09  | 54                                      | 3.65  | 58                                     | 4.82  |
| Bahrain               | 47            | 4.45  | 61                   | 4.24  | 34                                      | 4.24  | 54                                     | 4.86  |
| Jamaica               | 48            | 4.41  | 49                   | 4.54  | 59                                      | 3.53  | 36                                     | 5.17  |
| Mexico                | 49            | 4.38  | 48                   | 4.55  | 57                                      | 3.60  | 50                                     | 4.98  |
| Dominican Republic    | 50            | 4.35  | 51                   | 4.52  | 71                                      | 3.28  | 29                                     | 5.24  |
| Lithuania             | 51            | 4.34  | 57                   | 4.39  | 43                                      | 3.84  | 61                                     | 4.79  |
| Turkey                | 52            | 4.32  | 53                   | 4.45  | 63                                      | 3.49  | 48                                     | 5.00  |
| Latvia                | 53            | 4.31  | 60                   | 4.32  | 41                                      | 4.00  | 77                                     | 4.63  |
| Bulgaria              | 54            | 4.31  | 66                   | 4.17  | 56                                      | 3.64  | 41                                     | 5.11  |
| Panama                | 55            | 4.28  | 56                   | 4.41  | 53                                      | 3.66  | 63                                     | 4.76  |
| Uruguay               | 56            | 4.28  | 43                   | 4.76  | 67                                      | 3.32  | 64                                     | 4.75  |
| Morocco               | 57            | 4.27  | 47                   | 4.60  | 72                                      | 3.27  | 52                                     | 4.93  |
| Egypt                 | 58            | 4.24  | 50                   | 4.52  | 60                                      | 3.51  | 68                                     | 4.70  |
| Brazil                | 59            | 4.20  | 67                   | 4.14  | 48                                      | 3.76  | 67                                     | 4.70  |
| Indonesia             | 60            | 4.20  | 54                   | 4.45  | 68                                      | 3.30  | 56                                     | 4.85  |
| Serbia and Montenegro | 61            | 4.18  | 79                   | 3.99  | 80                                      | 3.09  | 13                                     | 5.47  |
| South Africa          | 62            | 4.18  | 59                   | 4.35  | 44                                      | 3.81  | 96                                     | 4.37  |
| Poland                | 63            | 4.18  | 63                   | 4.22  | 62                                      | 3.50  | 60                                     | 4.81  |
| Argentina             | 64            | 4.18  | 85                   | 3.90  | 58                                      | 3.58  | 45                                     | 5.05  |
| India                 | 65            | 4.14  | 62                   | 4.24  | 55                                      | 3.64  | 81                                     | 4.55  |
| Georgia               | 66            | 4.13  | 55                   | 4.44  | 98                                      | 2.77  | 31                                     | 5.18  |

(cont'd.)

Table 1: The Travel &amp; Tourism Competitiveness Index (cont'd.)

| Country/Economy        | SUBINDEXES    |       |                      |       |                                         |       |                                        |       |
|------------------------|---------------|-------|----------------------|-------|-----------------------------------------|-------|----------------------------------------|-------|
|                        | OVERALL INDEX |       | Regulatory framework |       | Business environment and infrastructure |       | Human, cultural, and natural resources |       |
|                        | Rank          | Score | Rank                 | Score | Rank                                    | Score | Rank                                   | Score |
| Kuwait                 | 67            | 4.08  | 71                   | 4.07  | 50                                      | 3.71  | 86                                     | 4.46  |
| Russian Federation     | 68            | 4.03  | 100                  | 3.64  | 49                                      | 3.75  | 65                                     | 4.71  |
| Guatemala              | 69            | 4.00  | 68                   | 4.14  | 76                                      | 3.16  | 69                                     | 4.69  |
| Botswana               | 70            | 3.99  | 64                   | 4.21  | 69                                      | 3.30  | 85                                     | 4.47  |
| China                  | 71            | 3.97  | 78                   | 4.00  | 61                                      | 3.51  | 93                                     | 4.39  |
| Colombia               | 72            | 3.96  | 69                   | 4.12  | 77                                      | 3.15  | 78                                     | 4.62  |
| Namibia                | 73            | 3.95  | 73                   | 4.05  | 64                                      | 3.44  | 95                                     | 4.37  |
| Armenia                | 74            | 3.93  | 65                   | 4.21  | 96                                      | 2.80  | 62                                     | 4.77  |
| Azerbaijan             | 75            | 3.92  | 77                   | 4.01  | 70                                      | 3.29  | 88                                     | 4.45  |
| Romania                | 76            | 3.91  | 87                   | 3.86  | 74                                      | 3.20  | 71                                     | 4.68  |
| El Salvador            | 77            | 3.90  | 75                   | 4.01  | 66                                      | 3.34  | 98                                     | 4.36  |
| Ukraine                | 78            | 3.89  | 76                   | 4.01  | 73                                      | 3.21  | 89                                     | 4.45  |
| Sri Lanka              | 79            | 3.89  | 70                   | 4.11  | 91                                      | 2.86  | 70                                     | 4.69  |
| Tanzania               | 80            | 3.86  | 72                   | 4.07  | 89                                      | 2.88  | 75                                     | 4.64  |
| Peru                   | 81            | 3.86  | 74                   | 4.04  | 85                                      | 2.95  | 80                                     | 4.59  |
| Kazakhstan             | 82            | 3.81  | 81                   | 3.97  | 81                                      | 3.03  | 90                                     | 4.44  |
| Macedonia, FYR         | 83            | 3.81  | 114                  | 3.34  | 82                                      | 3.01  | 44                                     | 5.07  |
| Gambia                 | 84            | 3.81  | 52                   | 4.48  | 106                                     | 2.66  | 101                                    | 4.28  |
| Trinidad and Tobago    | 85            | 3.79  | 88                   | 3.83  | 65                                      | 3.35  | 104                                    | 4.20  |
| Philippines            | 86            | 3.79  | 80                   | 3.98  | 79                                      | 3.10  | 100                                    | 4.29  |
| Vietnam                | 87            | 3.78  | 84                   | 3.91  | 95                                      | 2.81  | 76                                     | 4.63  |
| Honduras               | 88            | 3.78  | 83                   | 3.93  | 83                                      | 2.97  | 91                                     | 4.44  |
| Nicaragua              | 89            | 3.76  | 82                   | 3.97  | 99                                      | 2.76  | 82                                     | 4.54  |
| Albania                | 90            | 3.75  | 94                   | 3.70  | 114                                     | 2.49  | 43                                     | 5.07  |
| Mongolia               | 91            | 3.72  | 92                   | 3.74  | 109                                     | 2.57  | 55                                     | 4.86  |
| Mauritania             | 92            | 3.71  | 95                   | 3.68  | 97                                      | 2.80  | 74                                     | 4.67  |
| Algeria                | 93            | 3.67  | 89                   | 3.81  | 93                                      | 2.82  | 97                                     | 4.37  |
| Zambia                 | 94            | 3.66  | 86                   | 3.87  | 120                                     | 2.44  | 72                                     | 4.67  |
| Moldova                | 95            | 3.65  | 99                   | 3.65  | 100                                     | 2.75  | 83                                     | 4.54  |
| Cambodia               | 96            | 3.64  | 90                   | 3.77  | 103                                     | 2.71  | 87                                     | 4.45  |
| Ecuador                | 97            | 3.64  | 98                   | 3.66  | 90                                      | 2.87  | 94                                     | 4.38  |
| Kenya                  | 98            | 3.62  | 91                   | 3.76  | 86                                      | 2.94  | 107                                    | 4.15  |
| Venezuela              | 99            | 3.62  | 117                  | 3.32  | 78                                      | 3.12  | 92                                     | 4.41  |
| Guyana                 | 100           | 3.56  | 96                   | 3.67  | 88                                      | 2.93  | 109                                    | 4.09  |
| Uganda                 | 101           | 3.56  | 105                  | 3.54  | 119                                     | 2.44  | 66                                     | 4.70  |
| Kyrgyz Republic        | 102           | 3.54  | 111                  | 3.41  | 104                                     | 2.69  | 84                                     | 4.52  |
| Pakistan               | 103           | 3.52  | 106                  | 3.50  | 75                                      | 3.19  | 118                                    | 3.88  |
| Bosnia and Herzegovina | 104           | 3.51  | 101                  | 3.59  | 94                                      | 2.82  | 108                                    | 4.14  |
| Mali                   | 105           | 3.50  | 93                   | 3.72  | 121                                     | 2.41  | 99                                     | 4.36  |
| Nepal                  | 106           | 3.49  | 113                  | 3.39  | 117                                     | 2.47  | 79                                     | 4.60  |
| Zimbabwe               | 107           | 3.48  | 108                  | 3.49  | 84                                      | 2.97  | 114                                    | 3.99  |
| Suriname               | 108           | 3.47  | 110                  | 3.44  | 87                                      | 2.94  | 112                                    | 4.02  |
| Bolivia                | 109           | 3.46  | 109                  | 3.46  | 101                                     | 2.73  | 103                                    | 4.20  |
| Tajikistan             | 110           | 3.46  | 97                   | 3.67  | 112                                     | 2.52  | 105                                    | 4.18  |
| Paraguay               | 111           | 3.44  | 107                  | 3.50  | 92                                      | 2.84  | 113                                    | 4.00  |
| Madagascar             | 112           | 3.44  | 104                  | 3.54  | 105                                     | 2.68  | 110                                    | 4.09  |
| Burkina Faso           | 113           | 3.41  | 102                  | 3.58  | 115                                     | 2.48  | 106                                    | 4.17  |
| Malawi                 | 114           | 3.31  | 103                  | 3.57  | 118                                     | 2.46  | 117                                    | 3.90  |
| Nigeria                | 115           | 3.30  | 118                  | 3.32  | 102                                     | 2.72  | 119                                    | 3.86  |
| Benin                  | 116           | 3.28  | 112                  | 3.40  | 116                                     | 2.47  | 115                                    | 3.96  |
| Ethiopia               | 117           | 3.26  | 120                  | 3.13  | 110                                     | 2.57  | 111                                    | 4.08  |
| Cameroon               | 118           | 3.25  | 119                  | 3.16  | 122                                     | 2.37  | 102                                    | 4.22  |
| Mozambique             | 119           | 3.23  | 115                  | 3.34  | 107                                     | 2.63  | 121                                    | 3.71  |
| Bangladesh             | 120           | 3.21  | 121                  | 3.07  | 108                                     | 2.61  | 116                                    | 3.96  |
| Lesotho                | 121           | 3.12  | 116                  | 3.34  | 111                                     | 2.54  | 123                                    | 3.48  |
| Angola                 | 122           | 2.89  | 122                  | 2.91  | 113                                     | 2.50  | 124                                    | 3.25  |
| Burundi                | 123           | 2.88  | 123                  | 2.82  | 123                                     | 2.31  | 122                                    | 3.50  |
| Chad                   | 124           | 2.68  | 124                  | 2.51  | 124                                     | 1.80  | 120                                    | 3.72  |

**Table 2: The Travel & Tourism Competitiveness Index: Regulatory framework**

| Country/Economy        | Regulatory framework |       | PILLARS                      |       |                          |       |                     |       |                    |       |                                    |       |
|------------------------|----------------------|-------|------------------------------|-------|--------------------------|-------|---------------------|-------|--------------------|-------|------------------------------------|-------|
|                        |                      |       | Policy rules and regulations |       | Environmental regulation |       | Safety and security |       | Health and hygiene |       | Prioritization of Travel & Tourism |       |
|                        | Rank                 | Score | Rank                         | Score | Rank                     | Score | Rank                | Score | Rank               | Score | Rank                               | Score |
| Albania                | 94                   | 3.70  | 84                           | 4.14  | 124                      | 2.50  | 80                  | 4.09  | 58                 | 4.81  | 107                                | 2.94  |
| Algeria                | 89                   | 3.81  | 113                          | 3.37  | 82                       | 3.66  | 74                  | 4.18  | 53                 | 4.91  | 109                                | 2.92  |
| Angola                 | 122                  | 2.91  | 121                          | 2.93  | 115                      | 2.92  | 92                  | 3.85  | 119                | 2.61  | 121                                | 2.27  |
| Argentina              | 85                   | 3.90  | 78                           | 4.30  | 94                       | 3.41  | 91                  | 3.90  | 90                 | 4.04  | 64                                 | 3.85  |
| Armenia                | 65                   | 4.21  | 92                           | 3.81  | 102                      | 3.28  | 49                  | 4.79  | 40                 | 5.46  | 67                                 | 3.68  |
| Australia              | 16                   | 5.28  | 52                           | 4.81  | 13                       | 5.58  | 20                  | 5.50  | 22                 | 5.91  | 30                                 | 4.62  |
| Austria                | 3                    | 5.79  | 22                           | 5.33  | 2                        | 6.09  | 4                   | 6.20  | 14                 | 6.18  | 14                                 | 5.17  |
| Azerbaijan             | 77                   | 4.01  | 96                           | 3.76  | 104                      | 3.18  | 38                  | 4.97  | 63                 | 4.70  | 84                                 | 3.42  |
| Bahrain                | 61                   | 4.24  | 62                           | 4.71  | 77                       | 3.74  | 61                  | 4.55  | 61                 | 4.76  | 81                                 | 3.46  |
| Bangladesh             | 121                  | 3.07  | 99                           | 3.69  | 112                      | 2.96  | 119                 | 3.08  | 105                | 3.27  | 118                                | 2.37  |
| Barbados               | 31                   | 5.08  | 27                           | 5.24  | 42                       | 4.43  | 35                  | 5.13  | 42                 | 5.40  | 11                                 | 5.19  |
| Belgium                | 24                   | 5.16  | 20                           | 5.33  | 18                       | 5.44  | 36                  | 5.06  | 2                  | 6.59  | 86                                 | 3.40  |
| Benin                  | 112                  | 3.40  | 119                          | 3.22  | 76                       | 3.75  | 82                  | 4.09  | 113                | 3.12  | 110                                | 2.84  |
| Bolivia                | 109                  | 3.46  | 85                           | 4.13  | 114                      | 2.95  | 103                 | 3.56  | 98                 | 3.73  | 108                                | 2.93  |
| Bosnia and Herzegovina | 101                  | 3.59  | 83                           | 4.18  | 119                      | 2.79  | 75                  | 4.16  | 57                 | 4.85  | 123                                | 1.97  |
| Botswana               | 64                   | 4.21  | 59                           | 4.74  | 59                       | 4.11  | 55                  | 4.65  | 86                 | 4.09  | 83                                 | 3.45  |
| Brazil                 | 67                   | 4.14  | 75                           | 4.35  | 46                       | 4.38  | 90                  | 3.91  | 72                 | 4.43  | 71                                 | 3.64  |
| Bulgaria               | 66                   | 4.17  | 82                           | 4.25  | 103                      | 3.24  | 107                 | 3.46  | 27                 | 5.81  | 45                                 | 4.11  |
| Burkina Faso           | 102                  | 3.58  | 105                          | 3.65  | 57                       | 4.16  | 65                  | 4.47  | 120                | 2.59  | 103                                | 3.05  |
| Burundi                | 123                  | 2.82  | 122                          | 2.92  | 118                      | 2.85  | 108                 | 3.45  | 111                | 3.16  | 124                                | 1.75  |
| Cambodia               | 90                   | 3.77  | 93                           | 3.78  | 73                       | 3.82  | 98                  | 3.72  | 122                | 2.21  | 7                                  | 5.34  |
| Cameroon               | 119                  | 3.16  | 111                          | 3.39  | 116                      | 2.91  | 89                  | 4.01  | 110                | 3.19  | 119                                | 2.32  |
| Canada                 | 15                   | 5.31  | 16                           | 5.46  | 19                       | 5.43  | 21                  | 5.40  | 38                 | 5.66  | 32                                 | 4.60  |
| Chad                   | 124                  | 2.51  | 123                          | 2.78  | 123                      | 2.62  | 120                 | 2.98  | 123                | 1.78  | 117                                | 2.38  |
| Chile                  | 38                   | 4.83  | 7                            | 5.66  | 36                       | 4.61  | 30                  | 5.22  | 51                 | 5.03  | 73                                 | 3.61  |
| China                  | 78                   | 4.00  | 97                           | 3.76  | 88                       | 3.53  | 83                  | 4.08  | 84                 | 4.09  | 33                                 | 4.54  |
| Colombia               | 69                   | 4.12  | 41                           | 4.99  | 58                       | 4.12  | 105                 | 3.48  | 55                 | 4.88  | 98                                 | 3.14  |
| Costa Rica             | 39                   | 4.80  | 17                           | 5.40  | 35                       | 4.63  | 67                  | 4.40  | 50                 | 5.05  | 34                                 | 4.54  |
| Croatia                | 58                   | 4.37  | 72                           | 4.55  | 52                       | 4.26  | 63                  | 4.54  | 66                 | 4.59  | 57                                 | 3.89  |
| Cyprus                 | 29                   | 5.09  | 49                           | 4.87  | 53                       | 4.26  | 34                  | 5.17  | 36                 | 5.69  | 4                                  | 5.49  |
| Czech Republic         | 40                   | 4.80  | 32                           | 5.15  | 31                       | 4.82  | 52                  | 4.74  | 44                 | 5.32  | 52                                 | 3.97  |
| Denmark                | 8                    | 5.46  | 10                           | 5.56  | 1                        | 6.11  | 8                   | 6.00  | 16                 | 6.14  | 80                                 | 3.47  |
| Dominican Republic     | 51                   | 4.52  | 14                           | 5.47  | 72                       | 3.84  | 87                  | 4.05  | 79                 | 4.18  | 18                                 | 5.05  |
| Ecuador                | 98                   | 3.66  | 77                           | 4.32  | 107                      | 3.08  | 102                 | 3.56  | 80                 | 4.12  | 96                                 | 3.21  |
| Egypt                  | 50                   | 4.52  | 69                           | 4.59  | 75                       | 3.79  | 64                  | 4.54  | 69                 | 4.50  | 12                                 | 5.18  |
| El Salvador            | 75                   | 4.01  | 9                            | 5.63  | 63                       | 3.97  | 118                 | 3.10  | 73                 | 4.27  | 100                                | 3.11  |
| Estonia                | 32                   | 5.07  | 47                           | 4.92  | 32                       | 4.78  | 28                  | 5.25  | 30                 | 5.75  | 28                                 | 4.67  |
| Ethiopia               | 120                  | 3.13  | 115                          | 3.33  | 111                      | 2.98  | 58                  | 4.60  | 124                | 1.67  | 102                                | 3.10  |
| Finland                | 7                    | 5.61  | 15                           | 5.46  | 5                        | 5.98  | 1                   | 6.55  | 6                  | 6.32  | 65                                 | 3.76  |
| France                 | 13                   | 5.34  | 40                           | 5.00  | 15                       | 5.50  | 29                  | 5.22  | 9                  | 6.27  | 27                                 | 4.69  |
| Gambia                 | 52                   | 4.48  | 74                           | 4.38  | 43                       | 4.41  | 48                  | 4.80  | 95                 | 3.81  | 20                                 | 4.98  |
| Georgia                | 55                   | 4.44  | 80                           | 4.27  | 68                       | 3.89  | 47                  | 4.80  | 43                 | 5.37  | 59                                 | 3.87  |
| Germany                | 6                    | 5.62  | 6                            | 5.67  | 3                        | 6.05  | 2                   | 6.26  | 11                 | 6.23  | 56                                 | 3.90  |
| Greece                 | 20                   | 5.21  | 57                           | 4.77  | 45                       | 4.39  | 18                  | 5.53  | 3                  | 6.53  | 22                                 | 4.85  |
| Guatemala              | 68                   | 4.14  | 18                           | 5.37  | 79                       | 3.68  | 114                 | 3.17  | 76                 | 4.23  | 38                                 | 4.24  |
| Guyana                 | 96                   | 3.67  | 79                           | 4.29  | 93                       | 3.44  | 124                 | 2.39  | 87                 | 4.08  | 41                                 | 4.16  |
| Honduras               | 83                   | 3.93  | 37                           | 5.12  | 87                       | 3.54  | 113                 | 3.24  | 83                 | 4.09  | 70                                 | 3.65  |
| Hong Kong SAR          | 4                    | 5.75  | 2                            | 5.76  | 24                       | 5.11  | 6                   | 6.07  | 1                  | 6.62  | 13                                 | 5.18  |
| Hungary                | 26                   | 5.15  | 25                           | 5.26  | 33                       | 4.75  | 25                  | 5.32  | 12                 | 6.20  | 39                                 | 4.22  |
| Iceland                | 5                    | 5.69  | 36                           | 5.12  | 12                       | 5.60  | 3                   | 6.21  | 4                  | 6.42  | 16                                 | 5.10  |
| India                  | 62                   | 4.24  | 86                           | 4.12  | 41                       | 4.45  | 39                  | 4.96  | 100                | 3.59  | 48                                 | 4.06  |
| Indonesia              | 54                   | 4.45  | 43                           | 4.97  | 81                       | 3.66  | 50                  | 4.77  | 103                | 3.48  | 6                                  | 5.36  |
| Ireland                | 14                   | 5.32  | 4                            | 5.69  | 22                       | 5.18  | 31                  | 5.22  | 35                 | 5.69  | 24                                 | 4.84  |
| Israel                 | 36                   | 4.93  | 30                           | 5.18  | 30                       | 4.86  | 69                  | 4.34  | 7                  | 6.31  | 53                                 | 3.93  |
| Italy                  | 42                   | 4.77  | 70                           | 4.58  | 54                       | 4.26  | 53                  | 4.73  | 5                  | 6.41  | 60                                 | 3.86  |
| Jamaica                | 49                   | 4.54  | 3                            | 5.70  | 67                       | 3.92  | 111                 | 3.30  | 67                 | 4.59  | 10                                 | 5.22  |
| Japan                  | 28                   | 5.10  | 38                           | 5.05  | 17                       | 5.47  | 23                  | 5.37  | 28                 | 5.78  | 63                                 | 3.85  |
| Jordan                 | 30                   | 5.09  | 29                           | 5.18  | 56                       | 4.21  | 19                  | 5.53  | 41                 | 5.41  | 17                                 | 5.10  |
| Kazakhstan             | 81                   | 3.97  | 106                          | 3.54  | 80                       | 3.67  | 76                  | 4.15  | 45                 | 5.30  | 97                                 | 3.20  |
| Kenya                  | 91                   | 3.76  | 116                          | 3.33  | 60                       | 4.07  | 116                 | 3.12  | 106                | 3.26  | 19                                 | 4.99  |
| Korea, Rep.            | 46                   | 4.61  | 56                           | 4.78  | 37                       | 4.60  | 37                  | 5.00  | 60                 | 4.78  | 58                                 | 3.87  |
| Kuwait                 | 71                   | 4.07  | 100                          | 3.69  | 96                       | 3.35  | 22                  | 5.38  | 37                 | 5.67  | 120                                | 2.28  |
| Kyrgyz Republic        | 111                  | 3.41  | 120                          | 3.10  | 106                      | 3.16  | 115                 | 3.15  | 74                 | 4.27  | 89                                 | 3.37  |
| Latvia                 | 60                   | 4.32  | 71                           | 4.57  | 49                       | 4.31  | 41                  | 4.92  | 68                 | 4.56  | 94                                 | 3.22  |
| Lesotho                | 116                  | 3.34  | 87                           | 4.04  | 105                      | 3.17  | 94                  | 3.80  | 109                | 3.21  | 115                                | 2.46  |
| Lithuania              | 57                   | 4.39  | 68                           | 4.59  | 51                       | 4.29  | 57                  | 4.60  | 47                 | 5.24  | 95                                 | 3.21  |

(cont'd.)



Table 2: The Travel &amp; Tourism Competitiveness Index: Regulatory framework (cont'd.)

| Country/Economy       | Regulatory framework |       | PILLARS                      |       |                          |       |                     |       |                    |       |                                    |       |
|-----------------------|----------------------|-------|------------------------------|-------|--------------------------|-------|---------------------|-------|--------------------|-------|------------------------------------|-------|
|                       | Rank                 | Score | Policy rules and regulations |       | Environmental regulation |       | Safety and security |       | Health and hygiene |       | Prioritization of Travel & Tourism |       |
|                       | Rank                 | Score | Rank                         | Score | Rank                     | Score | Rank                | Score | Rank               | Score | Rank                               | Score |
| Luxembourg            | 17                   | 5.28  | 5                            | 5.67  | 11                       | 5.65  | 13                  | 5.70  | 19                 | 5.97  | 85                                 | 3.41  |
| Macedonia, FYR        | 114                  | 3.34  | 89                           | 3.96  | 110                      | 3.01  | 97                  | 3.75  | 96                 | 3.80  | 122                                | 2.20  |
| Madagascar            | 104                  | 3.54  | 117                          | 3.23  | 62                       | 3.98  | 93                  | 3.81  | 118                | 2.69  | 50                                 | 3.99  |
| Malawi                | 103                  | 3.57  | 73                           | 4.45  | 86                       | 3.56  | 81                  | 4.09  | 104                | 3.28  | 114                                | 2.47  |
| Malaysia              | 27                   | 5.12  | 26                           | 5.25  | 20                       | 5.31  | 26                  | 5.30  | 62                 | 4.75  | 21                                 | 4.98  |
| Mali                  | 93                   | 3.72  | 110                          | 3.45  | 69                       | 3.87  | 66                  | 4.45  | 114                | 3.12  | 66                                 | 3.71  |
| Malta                 | 23                   | 5.16  | 53                           | 4.79  | 55                       | 4.21  | 16                  | 5.62  | 26                 | 5.82  | 5                                  | 5.37  |
| Mauritania            | 95                   | 3.68  | 112                          | 3.38  | 98                       | 3.34  | 54                  | 4.71  | 115                | 3.05  | 55                                 | 3.90  |
| Mauritius             | 35                   | 4.96  | 63                           | 4.67  | 34                       | 4.67  | 40                  | 4.95  | 46                 | 5.25  | 9                                  | 5.24  |
| Mexico                | 48                   | 4.55  | 33                           | 5.13  | 47                       | 4.35  | 104                 | 3.54  | 49                 | 5.05  | 29                                 | 4.65  |
| Moldova               | 99                   | 3.65  | 118                          | 3.22  | 92                       | 3.46  | 88                  | 4.01  | 56                 | 4.87  | 113                                | 2.69  |
| Mongolia              | 92                   | 3.74  | 94                           | 3.78  | 117                      | 2.87  | 77                  | 4.13  | 75                 | 4.26  | 68                                 | 3.66  |
| Morocco               | 47                   | 4.60  | 48                           | 4.90  | 64                       | 3.97  | 43                  | 4.88  | 81                 | 4.11  | 15                                 | 5.16  |
| Mozambique            | 115                  | 3.34  | 108                          | 3.50  | 91                       | 3.48  | 100                 | 3.60  | 121                | 2.50  | 72                                 | 3.64  |
| Namibia               | 73                   | 4.05  | 44                           | 4.95  | 48                       | 4.32  | 85                  | 4.07  | 107                | 3.23  | 69                                 | 3.66  |
| Nepal                 | 113                  | 3.39  | 91                           | 3.83  | 97                       | 3.35  | 123                 | 2.73  | 116                | 3.02  | 49                                 | 4.04  |
| Netherlands           | 22                   | 5.17  | 12                           | 5.50  | 10                       | 5.69  | 27                  | 5.29  | 15                 | 6.16  | 91                                 | 3.24  |
| New Zealand           | 10                   | 5.44  | 19                           | 5.36  | 8                        | 5.85  | 12                  | 5.72  | 23                 | 5.90  | 36                                 | 4.37  |
| Nicaragua             | 82                   | 3.97  | 39                           | 5.04  | 99                       | 3.32  | 68                  | 4.36  | 97                 | 3.76  | 88                                 | 3.38  |
| Nigeria               | 118                  | 3.32  | 109                          | 3.49  | 78                       | 3.69  | 117                 | 3.10  | 108                | 3.21  | 101                                | 3.10  |
| Norway                | 9                    | 5.45  | 34                           | 5.13  | 9                        | 5.83  | 9                   | 5.96  | 10                 | 6.24  | 46                                 | 4.10  |
| Pakistan              | 106                  | 3.50  | 98                           | 3.73  | 85                       | 3.57  | 106                 | 3.46  | 91                 | 4.04  | 111                                | 2.71  |
| Panama                | 56                   | 4.41  | 31                           | 5.16  | 70                       | 3.85  | 59                  | 4.58  | 65                 | 4.63  | 62                                 | 3.85  |
| Paraguay              | 107                  | 3.50  | 95                           | 3.77  | 121                      | 2.68  | 101                 | 3.58  | 88                 | 4.08  | 87                                 | 3.39  |
| Peru                  | 74                   | 4.04  | 35                           | 5.13  | 71                       | 3.85  | 110                 | 3.38  | 93                 | 3.97  | 61                                 | 3.86  |
| Philippines           | 80                   | 3.98  | 61                           | 4.72  | 83                       | 3.65  | 96                  | 3.75  | 77                 | 4.22  | 74                                 | 3.59  |
| Poland                | 63                   | 4.22  | 66                           | 4.66  | 65                       | 3.96  | 71                  | 4.26  | 89                 | 4.07  | 42                                 | 4.15  |
| Portugal              | 11                   | 5.40  | 28                           | 5.23  | 26                       | 5.05  | 11                  | 5.82  | 17                 | 6.13  | 26                                 | 4.78  |
| Qatar                 | 34                   | 5.04  | 65                           | 4.66  | 29                       | 4.89  | 17                  | 5.61  | 24                 | 5.88  | 40                                 | 4.17  |
| Romania               | 87                   | 3.86  | 67                           | 4.61  | 101                      | 3.31  | 72                  | 4.26  | 99                 | 3.68  | 82                                 | 3.45  |
| Russian Federation    | 100                  | 3.64  | 124                          | 2.71  | 113                      | 2.96  | 99                  | 3.66  | 31                 | 5.73  | 99                                 | 3.13  |
| Serbia and Montenegro | 79                   | 3.99  | 76                           | 4.33  | 120                      | 2.72  | 62                  | 4.55  | 48                 | 5.11  | 92                                 | 3.23  |
| Singapore             | 1                    | 5.81  | 1                            | 5.78  | 6                        | 5.92  | 7                   | 6.02  | 29                 | 5.77  | 2                                  | 5.57  |
| Slovak Republic       | 37                   | 4.86  | 24                           | 5.30  | 38                       | 4.59  | 24                  | 5.37  | 18                 | 5.99  | 104                                | 3.05  |
| Slovenia              | 44                   | 4.74  | 81                           | 4.27  | 27                       | 5.01  | 33                  | 5.21  | 34                 | 5.69  | 77                                 | 3.51  |
| South Africa          | 59                   | 4.35  | 46                           | 4.94  | 28                       | 4.97  | 95                  | 3.77  | 82                 | 4.10  | 51                                 | 3.99  |
| Spain                 | 25                   | 5.15  | 45                           | 4.95  | 40                       | 4.51  | 46                  | 4.84  | 21                 | 5.93  | 3                                  | 5.54  |
| Sri Lanka             | 70                   | 4.11  | 64                           | 4.67  | 74                       | 3.80  | 112                 | 3.27  | 70                 | 4.49  | 37                                 | 4.33  |
| Suriname              | 110                  | 3.44  | 107                          | 3.54  | 122                      | 2.67  | 84                  | 4.07  | 71                 | 4.48  | 116                                | 2.43  |
| Sweden                | 19                   | 5.25  | 23                           | 5.30  | 7                        | 5.87  | 15                  | 5.64  | 13                 | 6.19  | 93                                 | 3.22  |
| Switzerland           | 2                    | 5.80  | 21                           | 5.33  | 4                        | 6.04  | 5                   | 6.08  | 8                  | 6.29  | 8                                  | 5.28  |
| Taiwan, China         | 45                   | 4.73  | 8                            | 5.65  | 21                       | 5.19  | 32                  | 5.21  | 85                 | 4.09  | 78                                 | 3.51  |
| Tajikistan            | 97                   | 3.67  | 102                          | 3.68  | 89                       | 3.52  | 78                  | 4.11  | 92                 | 4.00  | 106                                | 3.03  |
| Tanzania              | 72                   | 4.07  | 101                          | 3.68  | 44                       | 4.40  | 79                  | 4.09  | 101                | 3.55  | 31                                 | 4.61  |
| Thailand              | 41                   | 4.78  | 55                           | 4.78  | 39                       | 4.58  | 42                  | 4.91  | 59                 | 4.80  | 25                                 | 4.84  |
| Trinidad and Tobago   | 88                   | 3.83  | 60                           | 4.74  | 100                      | 3.32  | 121                 | 2.85  | 64                 | 4.68  | 75                                 | 3.57  |
| Tunisia               | 12                   | 5.34  | 42                           | 4.98  | 16                       | 5.47  | 14                  | 5.64  | 52                 | 5.02  | 1                                  | 5.59  |
| Turkey                | 53                   | 4.45  | 51                           | 4.82  | 61                       | 4.04  | 56                  | 4.61  | 54                 | 4.90  | 54                                 | 3.91  |
| Uganda                | 105                  | 3.54  | 103                          | 3.66  | 66                       | 3.94  | 109                 | 3.44  | 112                | 3.13  | 79                                 | 3.51  |
| Ukraine               | 76                   | 4.01  | 88                           | 3.99  | 109                      | 3.04  | 73                  | 4.23  | 39                 | 5.55  | 90                                 | 3.25  |
| United Arab Emirates  | 18                   | 5.28  | 54                           | 4.78  | 25                       | 5.07  | 10                  | 5.83  | 25                 | 5.84  | 23                                 | 4.85  |
| United Kingdom        | 21                   | 5.20  | 11                           | 5.54  | 14                       | 5.52  | 44                  | 4.88  | 33                 | 5.70  | 35                                 | 4.38  |
| United States         | 33                   | 5.06  | 13                           | 5.48  | 23                       | 5.15  | 45                  | 4.84  | 32                 | 5.72  | 47                                 | 4.10  |
| Uruguay               | 43                   | 4.76  | 50                           | 4.84  | 50                       | 4.30  | 60                  | 4.57  | 20                 | 5.95  | 44                                 | 4.13  |
| Venezuela             | 117                  | 3.32  | 90                           | 3.84  | 108                      | 3.06  | 122                 | 2.80  | 78                 | 4.20  | 112                                | 2.70  |
| Vietnam               | 84                   | 3.91  | 104                          | 3.66  | 84                       | 3.59  | 51                  | 4.77  | 94                 | 3.96  | 76                                 | 3.55  |
| Zambia                | 86                   | 3.87  | 58                           | 4.76  | 95                       | 3.39  | 70                  | 4.33  | 117                | 2.69  | 43                                 | 4.15  |
| Zimbabwe              | 108                  | 3.49  | 114                          | 3.36  | 90                       | 3.51  | 86                  | 4.07  | 102                | 3.48  | 105                                | 3.04  |

**Table 3: The Travel & Tourism Competitiveness Index: Business environment and infrastructure**

| Country/Economy        | Business environment and infrastructure |       | PILLARS                      |       |                                 |       |                        |       |                    |       |                                       |       |
|------------------------|-----------------------------------------|-------|------------------------------|-------|---------------------------------|-------|------------------------|-------|--------------------|-------|---------------------------------------|-------|
|                        | Rank                                    | Score | Air transport infrastructure |       | Ground transport infrastructure |       | Tourism infrastructure |       | ICT infrastructure |       | Price competitiveness in T&T industry |       |
|                        | Rank                                    | Score | Rank                         | Score | Rank                            | Score | Rank                   | Score | Rank               | Score | Rank                                  | Score |
| Albania                | 114                                     | 2.49  | 113                          | 2.00  | 122                             | 1.94  | 86                     | 2.39  | 106                | 1.80  | 81                                    | 4.31  |
| Algeria                | 93                                      | 2.82  | 101                          | 2.25  | 78                              | 3.00  | 114                    | 1.69  | 118                | 1.63  | 9                                     | 5.52  |
| Angola                 | 113                                     | 2.50  | 98                           | 2.29  | 120                             | 2.00  | 115                    | 1.63  | 121                | 1.58  | 30                                    | 5.01  |
| Argentina              | 58                                      | 3.58  | 43                           | 3.49  | 69                              | 3.37  | 51                     | 3.51  | 55                 | 2.95  | 62                                    | 4.56  |
| Armenia                | 96                                      | 2.80  | 95                           | 2.32  | 98                              | 2.56  | 110                    | 1.86  | 84                 | 2.20  | 28                                    | 5.05  |
| Australia              | 10                                      | 5.04  | 5                            | 5.41  | 20                              | 5.18  | 14                     | 5.44  | 8                  | 5.57  | 111                                   | 3.59  |
| Austria                | 12                                      | 4.97  | 23                           | 4.10  | 17                              | 5.49  | 1                      | 6.92  | 22                 | 4.79  | 113                                   | 3.55  |
| Azerbaijan             | 70                                      | 3.29  | 77                           | 2.75  | 49                              | 3.87  | 101                    | 2.14  | 73                 | 2.39  | 17                                    | 5.30  |
| Bahrain                | 34                                      | 4.24  | 27                           | 3.95  | 39                              | 4.21  | 31                     | 4.18  | 52                 | 3.00  | 3                                     | 5.84  |
| Bangladesh             | 108                                     | 2.61  | 114                          | 1.99  | 87                              | 2.82  | 120                    | 1.29  | 112                | 1.71  | 19                                    | 5.25  |
| Barbados               | 36                                      | 4.14  | 53                           | 3.22  | 41                              | 4.14  | 42                     | 3.78  | 25                 | 4.62  | 33                                    | 4.93  |
| Belgium                | 29                                      | 4.41  | 26                           | 3.99  | 9                               | 6.05  | 33                     | 4.15  | 29                 | 4.39  | 114                                   | 3.49  |
| Benin                  | 116                                     | 2.47  | 122                          | 1.71  | 100                             | 2.47  | 97                     | 2.18  | 113                | 1.70  | 79                                    | 4.32  |
| Bolivia                | 101                                     | 2.73  | 68                           | 2.87  | 121                             | 1.96  | 98                     | 2.17  | 98                 | 1.89  | 49                                    | 4.74  |
| Bosnia and Herzegovina | 94                                      | 2.82  | 117                          | 1.88  | 114                             | 2.12  | 56                     | 3.27  | 61                 | 2.67  | 92                                    | 4.14  |
| Botswana               | 69                                      | 3.30  | 59                           | 3.13  | 66                              | 3.49  | 73                     | 2.68  | 97                 | 1.89  | 16                                    | 5.32  |
| Brazil                 | 48                                      | 3.76  | 28                           | 3.94  | 79                              | 2.96  | 28                     | 4.36  | 48                 | 3.22  | 80                                    | 4.31  |
| Bulgaria               | 56                                      | 3.64  | 76                           | 2.75  | 70                              | 3.33  | 25                     | 4.43  | 50                 | 3.05  | 59                                    | 4.63  |
| Burkina Faso           | 115                                     | 2.48  | 119                          | 1.81  | 103                             | 2.44  | 109                    | 1.87  | 110                | 1.74  | 67                                    | 4.53  |
| Burundi                | 123                                     | 2.31  | 123                          | 1.58  | 117                             | 2.10  | 111                    | 1.86  | 123                | 1.46  | 66                                    | 4.54  |
| Cambodia               | 103                                     | 2.71  | 89                           | 2.54  | 82                              | 2.93  | 122                    | 1.09  | 111                | 1.71  | 18                                    | 5.27  |
| Cameroon               | 122                                     | 2.37  | 120                          | 1.80  | 113                             | 2.19  | 89                     | 2.29  | 122                | 1.51  | 100                                   | 4.04  |
| Canada                 | 4                                       | 5.22  | 2                            | 5.68  | 13                              | 5.67  | 16                     | 5.31  | 4                  | 5.76  | 110                                   | 3.68  |
| Chad                   | 124                                     | 1.80  | 124                          | 1.54  | 124                             | 1.63  | 117                    | 1.44  | 124                | 1.32  | 123                                   | 3.08  |
| Chile                  | 42                                      | 3.87  | 41                           | 3.59  | 30                              | 4.61  | 61                     | 3.12  | 41                 | 3.54  | 69                                    | 4.52  |
| China                  | 61                                      | 3.51  | 36                           | 3.78  | 45                              | 3.99  | 113                    | 1.72  | 63                 | 2.62  | 11                                    | 5.42  |
| Colombia               | 77                                      | 3.15  | 50                           | 3.34  | 86                              | 2.83  | 79                     | 2.53  | 67                 | 2.52  | 71                                    | 4.51  |
| Costa Rica             | 52                                      | 3.66  | 44                           | 3.49  | 93                              | 2.59  | 36                     | 4.10  | 45                 | 3.32  | 42                                    | 4.83  |
| Croatia                | 40                                      | 4.06  | 80                           | 2.71  | 46                              | 3.98  | 11                     | 5.73  | 34                 | 3.79  | 96                                    | 4.09  |
| Cyprus                 | 23                                      | 4.50  | 34                           | 3.83  | 51                              | 3.84  | 5                      | 6.10  | 31                 | 4.26  | 72                                    | 4.48  |
| Czech Republic         | 37                                      | 4.13  | 48                           | 3.39  | 38                              | 4.27  | 23                     | 4.49  | 26                 | 4.49  | 101                                   | 4.03  |
| Denmark                | 16                                      | 4.76  | 17                           | 4.63  | 7                               | 6.21  | 22                     | 4.61  | 10                 | 5.44  | 124                                   | 2.90  |
| Dominican Republic     | 71                                      | 3.28  | 63                           | 3.04  | 71                              | 3.20  | 39                     | 3.90  | 79                 | 2.33  | 104                                   | 3.94  |
| Ecuador                | 90                                      | 2.87  | 82                           | 2.67  | 97                              | 2.58  | 94                     | 2.19  | 85                 | 2.15  | 45                                    | 4.76  |
| Egypt                  | 60                                      | 3.51  | 49                           | 3.35  | 58                              | 3.73  | 85                     | 2.39  | 74                 | 2.39  | 5                                     | 5.68  |
| El Salvador            | 66                                      | 3.34  | 57                           | 3.15  | 63                              | 3.54  | 78                     | 2.55  | 66                 | 2.54  | 36                                    | 4.89  |
| Estonia                | 25                                      | 4.45  | 56                           | 3.17  | 31                              | 4.48  | 21                     | 4.84  | 19                 | 4.86  | 34                                    | 4.92  |
| Ethiopia               | 110                                     | 2.57  | 94                           | 2.35  | 118                             | 2.07  | 118                    | 1.43  | 119                | 1.60  | 13                                    | 5.39  |
| Finland                | 18                                      | 4.68  | 19                           | 4.55  | 10                              | 5.88  | 29                     | 4.33  | 15                 | 5.24  | 117                                   | 3.41  |
| France                 | 5                                       | 5.10  | 4                            | 5.45  | 4                               | 6.44  | 15                     | 5.40  | 21                 | 4.83  | 118                                   | 3.35  |
| Gambia                 | 106                                     | 2.66  | 102                          | 2.21  | 80                              | 2.95  | 108                    | 1.87  | 104                | 1.82  | 73                                    | 4.48  |
| Georgia                | 98                                      | 2.77  | 106                          | 2.16  | 76                              | 3.07  | 106                    | 1.87  | 87                 | 2.09  | 58                                    | 4.65  |
| Germany                | 3                                       | 5.23  | 6                            | 5.39  | 1                               | 6.58  | 18                     | 5.28  | 13                 | 5.31  | 112                                   | 3.56  |
| Greece                 | 32                                      | 4.36  | 37                           | 3.72  | 34                              | 4.42  | 7                      | 6.02  | 38                 | 3.65  | 103                                   | 3.99  |
| Guatemala              | 76                                      | 3.16  | 55                           | 3.18  | 73                              | 3.12  | 76                     | 2.64  | 71                 | 2.46  | 74                                    | 4.41  |
| Guyana                 | 88                                      | 2.93  | 69                           | 2.83  | 92                              | 2.60  | 80                     | 2.52  | 65                 | 2.54  | 90                                    | 4.15  |
| Honduras               | 83                                      | 2.97  | 74                           | 2.77  | 75                              | 3.09  | 82                     | 2.45  | 90                 | 2.03  | 68                                    | 4.53  |
| Hong Kong SAR          | 14                                      | 4.81  | 12                           | 4.83  | 2                               | 6.46  | 70                     | 2.79  | 16                 | 4.98  | 31                                    | 4.98  |
| Hungary                | 51                                      | 3.71  | 65                           | 2.98  | 56                              | 3.74  | 34                     | 4.15  | 39                 | 3.61  | 97                                    | 4.07  |
| Iceland                | 8                                       | 5.04  | 13                           | 4.81  | 29                              | 4.61  | 10                     | 5.82  | 2                  | 6.16  | 108                                   | 3.80  |
| India                  | 55                                      | 3.64  | 33                           | 3.86  | 40                              | 4.17  | 96                     | 2.18  | 75                 | 2.38  | 6                                     | 5.61  |
| Indonesia              | 68                                      | 3.30  | 64                           | 2.98  | 89                              | 2.80  | 87                     | 2.36  | 80                 | 2.28  | 1                                     | 6.10  |
| Ireland                | 26                                      | 4.44  | 20                           | 4.33  | 50                              | 3.85  | 13                     | 5.58  | 30                 | 4.31  | 91                                    | 4.15  |
| Israel                 | 33                                      | 4.28  | 40                           | 3.59  | 24                              | 4.94  | 41                     | 3.79  | 23                 | 4.78  | 78                                    | 4.32  |
| Italy                  | 30                                      | 4.38  | 22                           | 4.20  | 55                              | 3.77  | 8                      | 6.00  | 27                 | 4.48  | 116                                   | 3.43  |
| Jamaica                | 59                                      | 3.53  | 47                           | 3.39  | 57                              | 3.74  | 64                     | 3.05  | 44                 | 3.37  | 95                                    | 4.09  |
| Japan                  | 17                                      | 4.71  | 16                           | 4.68  | 6                               | 6.32  | 43                     | 3.76  | 17                 | 4.95  | 107                                   | 3.84  |
| Jordan                 | 54                                      | 3.65  | 67                           | 2.88  | 47                              | 3.95  | 49                     | 3.56  | 72                 | 2.44  | 12                                    | 5.42  |
| Kazakhstan             | 81                                      | 3.03  | 75                           | 2.76  | 72                              | 3.19  | 100                    | 2.15  | 78                 | 2.34  | 51                                    | 4.72  |
| Kenya                  | 86                                      | 2.94  | 71                           | 2.82  | 84                              | 2.89  | 71                     | 2.75  | 93                 | 2.02  | 82                                    | 4.25  |
| Korea, Rep.            | 24                                      | 4.46  | 24                           | 4.10  | 19                              | 5.30  | 68                     | 2.88  | 3                  | 5.81  | 84                                    | 4.24  |
| Kuwait                 | 50                                      | 3.71  | 62                           | 3.06  | 43                              | 4.02  | 52                     | 3.49  | 53                 | 2.98  | 29                                    | 5.01  |
| Kyrgyz Republic        | 104                                     | 2.69  | 107                          | 2.15  | 104                             | 2.41  | 95                     | 2.19  | 99                 | 1.89  | 40                                    | 4.83  |
| Latvia                 | 41                                      | 4.00  | 54                           | 3.19  | 36                              | 4.29  | 37                     | 4.08  | 36                 | 3.73  | 55                                    | 4.68  |
| Lesotho                | 111                                     | 2.54  | 121                          | 1.75  | 115                             | 2.11  | 103                    | 1.98  | 117                | 1.67  | 24                                    | 5.17  |
| Lithuania              | 43                                      | 3.84  | 61                           | 3.07  | 32                              | 4.47  | 40                     | 3.80  | 40                 | 3.54  | 77                                    | 4.35  |

(cont'd.)



Table 3: The Travel &amp; Tourism Competitiveness Index: Business environment and infrastructure (cont'd.)

| Country/Economy       | Business environment and infrastructure |       | PILLARS                      |       |                                 |       |                        |       |                    |       |                                       |       |
|-----------------------|-----------------------------------------|-------|------------------------------|-------|---------------------------------|-------|------------------------|-------|--------------------|-------|---------------------------------------|-------|
|                       |                                         |       | Air transport infrastructure |       | Ground transport infrastructure |       | Tourism infrastructure |       | ICT infrastructure |       | Price competitiveness in T&T industry |       |
|                       | Rank                                    | Score | Rank                         | Score | Rank                            | Score | Rank                   | Score | Rank               | Score | Rank                                  | Score |
| Luxembourg            | 9                                       | 5.04  | 38                           | 3.68  | 21                              | 5.10  | 6                      | 6.05  | 6                  | 5.69  | 56                                    | 4.67  |
| Macedonia, FYR        | 82                                      | 3.01  | 108                          | 2.12  | 83                              | 2.92  | 63                     | 3.10  | 76                 | 2.38  | 64                                    | 4.55  |
| Madagascar            | 105                                     | 2.68  | 110                          | 2.03  | 106                             | 2.40  | 81                     | 2.48  | 115                | 1.68  | 43                                    | 4.82  |
| Malawi                | 118                                     | 2.46  | 118                          | 1.87  | 111                             | 2.32  | 112                    | 1.74  | 116                | 1.67  | 54                                    | 4.68  |
| Malaysia              | 27                                      | 4.44  | 31                           | 3.91  | 15                              | 5.58  | 60                     | 3.14  | 37                 | 3.69  | 2                                     | 5.89  |
| Mali                  | 121                                     | 2.41  | 116                          | 1.92  | 105                             | 2.40  | 105                    | 1.89  | 107                | 1.79  | 98                                    | 4.06  |
| Malta                 | 31                                      | 4.37  | 42                           | 3.58  | 60                              | 3.62  | 12                     | 5.60  | 11                 | 5.39  | 109                                   | 3.68  |
| Mauritania            | 97                                      | 2.80  | 111                          | 2.03  | 99                              | 2.47  | 72                     | 2.71  | 96                 | 1.90  | 38                                    | 4.88  |
| Mauritius             | 46                                      | 3.77  | 60                           | 3.12  | 53                              | 3.79  | 38                     | 3.99  | 59                 | 2.75  | 20                                    | 5.23  |
| Mexico                | 57                                      | 3.60  | 32                           | 3.87  | 62                              | 3.57  | 47                     | 3.58  | 60                 | 2.74  | 85                                    | 4.23  |
| Moldova               | 100                                     | 2.75  | 103                          | 2.19  | 110                             | 2.35  | 88                     | 2.32  | 81                 | 2.26  | 60                                    | 4.62  |
| Mongolia              | 109                                     | 2.57  | 96                           | 2.31  | 109                             | 2.35  | 116                    | 1.45  | 91                 | 2.02  | 52                                    | 4.71  |
| Morocco               | 72                                      | 3.27  | 83                           | 2.66  | 54                              | 3.78  | 62                     | 3.11  | 92                 | 2.02  | 46                                    | 4.76  |
| Mozambique            | 107                                     | 2.63  | 105                          | 2.17  | 108                             | 2.37  | 92                     | 2.20  | 120                | 1.60  | 41                                    | 4.83  |
| Namibia               | 64                                      | 3.44  | 45                           | 3.45  | 33                              | 4.46  | 83                     | 2.43  | 86                 | 2.10  | 47                                    | 4.75  |
| Nepal                 | 117                                     | 2.47  | 112                          | 2.02  | 116                             | 2.11  | 123                    | 1.08  | 105                | 1.81  | 14                                    | 5.35  |
| Netherlands           | 15                                      | 4.77  | 14                           | 4.80  | 8                               | 6.20  | 32                     | 4.16  | 12                 | 5.37  | 119                                   | 3.34  |
| New Zealand           | 20                                      | 4.57  | 15                           | 4.69  | 25                              | 4.83  | 35                     | 4.12  | 20                 | 4.85  | 75                                    | 4.37  |
| Nicaragua             | 99                                      | 2.76  | 73                           | 2.78  | 112                             | 2.24  | 77                     | 2.58  | 103                | 1.85  | 76                                    | 4.35  |
| Nigeria               | 102                                     | 2.72  | 104                          | 2.18  | 88                              | 2.80  | 107                    | 1.87  | 102                | 1.85  | 35                                    | 4.91  |
| Norway                | 21                                      | 4.56  | 18                           | 4.61  | 22                              | 5.10  | 17                     | 5.30  | 24                 | 4.70  | 121                                   | 3.10  |
| Pakistan              | 75                                      | 3.19  | 84                           | 2.64  | 52                              | 3.84  | 99                     | 2.17  | 89                 | 2.09  | 22                                    | 5.19  |
| Panama                | 53                                      | 3.66  | 39                           | 3.66  | 42                              | 4.04  | 57                     | 3.18  | 62                 | 2.63  | 44                                    | 4.79  |
| Paraguay              | 92                                      | 2.84  | 66                           | 2.89  | 119                             | 2.04  | 90                     | 2.28  | 109                | 1.76  | 21                                    | 5.22  |
| Peru                  | 85                                      | 2.95  | 88                           | 2.55  | 96                              | 2.58  | 66                     | 2.96  | 68                 | 2.49  | 89                                    | 4.15  |
| Philippines           | 79                                      | 3.10  | 72                           | 2.80  | 91                              | 2.70  | 93                     | 2.19  | 83                 | 2.22  | 7                                     | 5.59  |
| Poland                | 62                                      | 3.50  | 86                           | 2.60  | 61                              | 3.60  | 46                     | 3.61  | 43                 | 3.46  | 83                                    | 4.24  |
| Portugal              | 22                                      | 4.50  | 35                           | 3.81  | 23                              | 4.99  | 9                      | 5.89  | 33                 | 3.83  | 102                                   | 3.99  |
| Qatar                 | 39                                      | 4.10  | 29                           | 3.93  | 48                              | 3.94  | 26                     | 4.40  | 49                 | 3.12  | 25                                    | 5.12  |
| Romania               | 74                                      | 3.20  | 93                           | 2.38  | 77                              | 3.01  | 50                     | 3.55  | 56                 | 2.85  | 87                                    | 4.19  |
| Russian Federation    | 49                                      | 3.75  | 21                           | 4.23  | 65                              | 3.52  | 58                     | 3.17  | 51                 | 3.01  | 39                                    | 4.84  |
| Serbia and Montenegro | 80                                      | 3.09  | 99                           | 2.29  | 107                             | 2.38  | 54                     | 3.34  | 46                 | 3.29  | 88                                    | 4.16  |
| Singapore             | 11                                      | 5.01  | 10                           | 4.88  | 3                               | 6.45  | 44                     | 3.73  | 18                 | 4.87  | 26                                    | 5.10  |
| Slovak Republic       | 45                                      | 3.81  | 97                           | 2.30  | 44                              | 4.01  | 30                     | 4.29  | 35                 | 3.78  | 57                                    | 4.66  |
| Slovenia              | 38                                      | 4.11  | 79                           | 2.72  | 37                              | 4.28  | 20                     | 5.22  | 28                 | 4.47  | 106                                   | 3.87  |
| South Africa          | 44                                      | 3.81  | 30                           | 3.92  | 35                              | 4.34  | 48                     | 3.58  | 70                 | 2.46  | 48                                    | 4.74  |
| Spain                 | 7                                       | 5.05  | 7                            | 5.17  | 18                              | 5.42  | 2                      | 6.80  | 32                 | 3.93  | 105                                   | 3.93  |
| Sri Lanka             | 91                                      | 2.86  | 91                           | 2.48  | 74                              | 3.11  | 102                    | 2.01  | 94                 | 1.99  | 53                                    | 4.70  |
| Suriname              | 87                                      | 2.94  | 81                           | 2.71  | 102                             | 2.46  | 59                     | 3.14  | 82                 | 2.26  | 93                                    | 4.11  |
| Sweden                | 13                                      | 4.88  | 11                           | 4.87  | 12                              | 5.74  | 27                     | 4.39  | 1                  | 6.31  | 122                                   | 3.10  |
| Switzerland           | 2                                       | 5.36  | 9                            | 4.97  | 5                               | 6.36  | 4                      | 6.48  | 9                  | 5.54  | 115                                   | 3.46  |
| Taiwan, China         | 28                                      | 4.43  | 52                           | 3.22  | 14                              | 5.66  | 74                     | 2.67  | 14                 | 5.27  | 15                                    | 5.32  |
| Tajikistan            | 112                                     | 2.52  | 109                          | 2.09  | 94                              | 2.58  | 124                    | 1.01  | 101                | 1.86  | 27                                    | 5.08  |
| Tanzania              | 89                                      | 2.88  | 100                          | 2.26  | 68                              | 3.39  | 84                     | 2.40  | 108                | 1.77  | 63                                    | 4.56  |
| Thailand              | 35                                      | 4.14  | 25                           | 4.07  | 28                              | 4.67  | 53                     | 3.45  | 58                 | 2.78  | 4                                     | 5.71  |
| Trinidad and Tobago   | 65                                      | 3.35  | 46                           | 3.43  | 90                              | 2.77  | 65                     | 2.97  | 57                 | 2.85  | 50                                    | 4.72  |
| Tunisia               | 47                                      | 3.77  | 78                           | 2.74  | 27                              | 4.78  | 45                     | 3.70  | 69                 | 2.46  | 23                                    | 5.17  |
| Turkey                | 63                                      | 3.49  | 51                           | 3.34  | 59                              | 3.66  | 55                     | 3.30  | 54                 | 2.95  | 86                                    | 4.21  |
| Uganda                | 119                                     | 2.44  | 115                          | 1.98  | 101                             | 2.46  | 119                    | 1.36  | 100                | 1.86  | 65                                    | 4.55  |
| Ukraine               | 73                                      | 3.21  | 87                           | 2.56  | 67                              | 3.39  | 75                     | 2.66  | 64                 | 2.56  | 37                                    | 4.89  |
| United Arab Emirates  | 19                                      | 4.68  | 8                            | 5.05  | 26                              | 4.82  | 24                     | 4.47  | 42                 | 3.53  | 8                                     | 5.53  |
| United Kingdom        | 6                                       | 5.08  | 3                            | 5.59  | 16                              | 5.52  | 19                     | 5.23  | 5                  | 5.73  | 120                                   | 3.30  |
| United States         | 1                                       | 5.74  | 1                            | 6.75  | 11                              | 5.77  | 3                      | 6.50  | 7                  | 5.64  | 99                                    | 4.06  |
| Uruguay               | 67                                      | 3.32  | 92                           | 2.47  | 64                              | 3.54  | 69                     | 2.80  | 47                 | 3.29  | 70                                    | 4.51  |
| Venezuela             | 78                                      | 3.12  | 58                           | 3.14  | 95                              | 2.58  | 67                     | 2.90  | 77                 | 2.36  | 61                                    | 4.60  |
| Vietnam               | 95                                      | 2.81  | 90                           | 2.52  | 85                              | 2.88  | 121                    | 1.11  | 88                 | 2.09  | 10                                    | 5.47  |
| Zambia                | 120                                     | 2.44  | 85                           | 2.61  | 123                             | 1.90  | 104                    | 1.91  | 114                | 1.69  | 94                                    | 4.10  |
| Zimbabwe              | 84                                      | 2.97  | 70                           | 2.82  | 81                              | 2.94  | 91                     | 2.21  | 95                 | 1.90  | 32                                    | 4.95  |

**Table 4: The Travel & Tourism Competitiveness Index: Human, cultural, and natural resources**

| Country/Economy        | PILLARS                                |       |                 |       |                             |       |                                |       |
|------------------------|----------------------------------------|-------|-----------------|-------|-----------------------------|-------|--------------------------------|-------|
|                        | Human, cultural, and natural resources |       | Human resources |       | National tourism perception |       | Natural and cultural resources |       |
|                        | Rank                                   | Score | Rank            | Score | Rank                        | Score | Rank                           | Score |
| Albania                | 43                                     | 5.07  | 35              | 5.37  | 10                          | 6.17  | 93                             | 3.68  |
| Algeria                | 97                                     | 4.37  | 86              | 4.82  | 114                         | 4.01  | 65                             | 4.28  |
| Angola                 | 124                                    | 3.25  | 118             | 3.09  | 121                         | 3.64  | 119                            | 3.02  |
| Argentina              | 45                                     | 5.05  | 66              | 5.08  | 52                          | 5.13  | 35                             | 4.93  |
| Armenia                | 62                                     | 4.77  | 53              | 5.23  | 53                          | 5.11  | 78                             | 3.98  |
| Australia              | 26                                     | 5.30  | 17              | 5.64  | 80                          | 4.60  | 15                             | 5.64  |
| Austria                | 1                                      | 5.86  | 23              | 5.53  | 33                          | 5.53  | 2                              | 6.52  |
| Azerbaijan             | 88                                     | 4.45  | 36              | 5.36  | 65                          | 4.82  | 116                            | 3.15  |
| Bahrain                | 54                                     | 4.86  | 79              | 4.94  | 36                          | 5.37  | 66                             | 4.27  |
| Bangladesh             | 116                                    | 3.96  | 99              | 4.30  | 119                         | 3.88  | 92                             | 3.69  |
| Barbados               | 17                                     | 5.38  | 42              | 5.32  | 2                           | 6.56  | 68                             | 4.25  |
| Belgium                | 4                                      | 5.62  | 27              | 5.49  | 59                          | 4.99  | 4                              | 6.38  |
| Benin                  | 115                                    | 3.96  | 104             | 4.08  | 79                          | 4.61  | 112                            | 3.19  |
| Bolivia                | 103                                    | 4.20  | 91              | 4.79  | 113                         | 4.02  | 90                             | 3.80  |
| Bosnia and Herzegovina | 108                                    | 4.14  | 90              | 4.79  | 111                         | 4.10  | 100                            | 3.52  |
| Botswana               | 85                                     | 4.47  | 113             | 3.52  | 28                          | 5.59  | 62                             | 4.30  |
| Brazil                 | 67                                     | 4.70  | 83              | 4.85  | 87                          | 4.54  | 42                             | 4.71  |
| Bulgaria               | 41                                     | 5.11  | 67              | 5.08  | 30                          | 5.56  | 43                             | 4.70  |
| Burkina Faso           | 106                                    | 4.17  | 117             | 3.18  | 12                          | 6.15  | 114                            | 3.18  |
| Burundi                | 122                                    | 3.50  | 119             | 3.08  | 98                          | 4.42  | 120                            | 2.99  |
| Cambodia               | 87                                     | 4.45  | 105             | 4.08  | 32                          | 5.53  | 91                             | 3.75  |
| Cameroon               | 102                                    | 4.22  | 103             | 4.16  | 24                          | 5.67  | 123                            | 2.83  |
| Canada                 | 16                                     | 5.40  | 12              | 5.69  | 76                          | 4.66  | 11                             | 5.86  |
| Chad                   | 120                                    | 3.72  | 120             | 2.99  | 37                          | 5.34  | 122                            | 2.83  |
| Chile                  | 47                                     | 5.03  | 24              | 5.52  | 92                          | 4.44  | 32                             | 5.13  |
| China                  | 93                                     | 4.39  | 74              | 5.00  | 120                         | 3.82  | 60                             | 4.36  |
| Colombia               | 78                                     | 4.62  | 58              | 5.18  | 89                          | 4.53  | 72                             | 4.16  |
| Costa Rica             | 20                                     | 5.34  | 28              | 5.49  | 39                          | 5.30  | 28                             | 5.22  |
| Croatia                | 11                                     | 5.55  | 54              | 5.22  | 4                           | 6.52  | 36                             | 4.90  |
| Cyprus                 | 3                                      | 5.62  | 49              | 5.24  | 5                           | 6.48  | 31                             | 5.15  |
| Czech Republic         | 22                                     | 5.32  | 26              | 5.50  | 77                          | 4.65  | 12                             | 5.80  |
| Denmark                | 9                                      | 5.59  | 4               | 6.08  | 69                          | 4.72  | 7                              | 5.97  |
| Dominican Republic     | 29                                     | 5.24  | 57              | 5.18  | 21                          | 5.88  | 45                             | 4.65  |
| Ecuador                | 94                                     | 4.38  | 96              | 4.51  | 86                          | 4.55  | 74                             | 4.10  |
| Egypt                  | 68                                     | 4.70  | 69              | 5.06  | 85                          | 4.55  | 55                             | 4.49  |
| El Salvador            | 98                                     | 4.36  | 41              | 5.32  | 102                         | 4.36  | 103                            | 3.41  |
| Estonia                | 34                                     | 5.18  | 30              | 5.45  | 31                          | 5.54  | 49                             | 4.54  |
| Ethiopia               | 111                                    | 4.08  | 112             | 3.55  | 101                         | 4.36  | 61                             | 4.32  |
| Finland                | 33                                     | 5.18  | 8               | 5.87  | 109                         | 4.15  | 18                             | 5.52  |
| France                 | 28                                     | 5.27  | 32              | 5.42  | 96                          | 4.42  | 9                              | 5.95  |
| Gambia                 | 101                                    | 4.28  | 107             | 3.96  | 25                          | 5.65  | 108                            | 3.25  |
| Georgia                | 31                                     | 5.18  | 33              | 5.40  | 7                           | 6.26  | 81                             | 3.89  |
| Germany                | 6                                      | 5.61  | 25              | 5.52  | 88                          | 4.54  | 1                              | 6.75  |
| Greece                 | 15                                     | 5.41  | 55              | 5.21  | 23                          | 5.71  | 23                             | 5.29  |
| Guatemala              | 69                                     | 4.69  | 78              | 4.95  | 74                          | 4.67  | 56                             | 4.46  |
| Guyana                 | 109                                    | 4.09  | 95              | 4.62  | 68                          | 4.73  | 121                            | 2.91  |
| Honduras               | 91                                     | 4.44  | 82              | 4.86  | 63                          | 4.83  | 97                             | 3.62  |
| Hong Kong SAR          | 14                                     | 5.44  | 7               | 5.93  | 27                          | 5.60  | 39                             | 4.78  |
| Hungary                | 51                                     | 4.98  | 37              | 5.34  | 100                         | 4.39  | 30                             | 5.20  |
| Iceland                | 5                                      | 5.61  | 3               | 6.19  | 49                          | 5.19  | 22                             | 5.44  |
| India                  | 81                                     | 4.55  | 85              | 4.83  | 81                          | 4.60  | 70                             | 4.22  |
| Indonesia              | 56                                     | 4.85  | 62              | 5.14  | 57                          | 5.00  | 58                             | 4.40  |
| Ireland                | 46                                     | 5.03  | 9               | 5.83  | 67                          | 4.77  | 54                             | 4.49  |
| Israel                 | 35                                     | 5.18  | 13              | 5.69  | 78                          | 4.61  | 27                             | 5.23  |
| Italy                  | 32                                     | 5.18  | 46              | 5.26  | 66                          | 4.79  | 20                             | 5.50  |
| Jamaica                | 36                                     | 5.17  | 39              | 5.33  | 15                          | 6.10  | 76                             | 4.08  |
| Japan                  | 38                                     | 5.15  | 11              | 5.75  | 116                         | 3.97  | 14                             | 5.73  |
| Jordan                 | 58                                     | 4.82  | 63              | 5.13  | 34                          | 5.51  | 86                             | 3.83  |
| Kazakhstan             | 90                                     | 4.44  | 60              | 5.17  | 58                          | 5.00  | 117                            | 3.15  |
| Kenya                  | 107                                    | 4.15  | 100             | 4.20  | 75                          | 4.67  | 98                             | 3.59  |
| Korea, Rep.            | 73                                     | 4.67  | 48              | 5.24  | 118                         | 3.88  | 37                             | 4.89  |
| Kuwait                 | 86                                     | 4.46  | 16              | 5.64  | 117                         | 3.94  | 89                             | 3.80  |
| Kyrgyz Republic        | 84                                     | 4.52  | 71              | 5.05  | 72                          | 4.69  | 88                             | 3.82  |
| Latvia                 | 77                                     | 4.63  | 38              | 5.33  | 107                         | 4.29  | 67                             | 4.27  |
| Lesotho                | 123                                    | 3.48  | 116             | 3.37  | 103                         | 4.34  | 124                            | 2.72  |
| Lithuania              | 61                                     | 4.79  | 61              | 5.15  | 93                          | 4.44  | 38                             | 4.80  |

(cont'd.)

**Table 4: The Travel & Tourism Competitiveness Index: Human, cultural, and natural resources (cont'd.)**

| Country/Economy       | PILLARS                                |       |                 |       |                             |       |                                |       |
|-----------------------|----------------------------------------|-------|-----------------|-------|-----------------------------|-------|--------------------------------|-------|
|                       | Human, cultural, and natural resources |       | Human resources |       | National tourism perception |       | Natural and cultural resources |       |
|                       | Rank                                   | Score | Rank            | Score | Rank                        | Score | Rank                           | Score |
| Luxembourg            | 8                                      | 5.60  | 14              | 5.69  | 22                          | 5.84  | 24                             | 5.29  |
| Macedonia, FYR        | 44                                     | 5.07  | 56              | 5.21  | 13                          | 6.11  | 82                             | 3.89  |
| Madagascar            | 110                                    | 4.09  | 108             | 3.93  | 73                          | 4.68  | 94                             | 3.66  |
| Malawi                | 117                                    | 3.90  | 121             | 2.84  | 40                          | 5.29  | 99                             | 3.56  |
| Malaysia              | 57                                     | 4.84  | 34              | 5.38  | 26                          | 5.64  | 101                            | 3.52  |
| Mali                  | 99                                     | 4.36  | 114             | 3.49  | 8                           | 6.21  | 104                            | 3.37  |
| Malta                 | 21                                     | 5.33  | 43              | 5.32  | 16                          | 6.03  | 44                             | 4.66  |
| Mauritania            | 74                                     | 4.67  | 101             | 4.19  | 1                           | 6.58  | 110                            | 3.23  |
| Mauritius             | 39                                     | 5.15  | 89              | 4.80  | 14                          | 6.10  | 50                             | 4.54  |
| Mexico                | 50                                     | 4.98  | 50              | 5.24  | 91                          | 4.50  | 29                             | 5.22  |
| Moldova               | 83                                     | 4.54  | 80              | 4.94  | 48                          | 5.19  | 102                            | 3.49  |
| Mongolia              | 55                                     | 4.86  | 68              | 5.07  | 11                          | 6.16  | 105                            | 3.34  |
| Morocco               | 52                                     | 4.93  | 72              | 5.04  | 45                          | 5.24  | 52                             | 4.50  |
| Mozambique            | 121                                    | 3.71  | 124             | 2.54  | 44                          | 5.27  | 106                            | 3.32  |
| Namibia               | 95                                     | 4.37  | 122             | 2.83  | 9                           | 6.17  | 73                             | 4.12  |
| Nepal                 | 79                                     | 4.60  | 106             | 4.05  | 20                          | 5.91  | 85                             | 3.83  |
| Netherlands           | 25                                     | 5.30  | 21              | 5.55  | 82                          | 4.60  | 13                             | 5.74  |
| New Zealand           | 7                                      | 5.60  | 20              | 5.60  | 38                          | 5.34  | 10                             | 5.88  |
| Nicaragua             | 82                                     | 4.54  | 59              | 5.18  | 84                          | 4.58  | 83                             | 3.87  |
| Nigeria               | 119                                    | 3.86  | 102             | 4.18  | 110                         | 4.13  | 107                            | 3.25  |
| Norway                | 40                                     | 5.12  | 18              | 5.62  | 108                         | 4.26  | 21                             | 5.46  |
| Pakistan              | 118                                    | 3.88  | 98              | 4.45  | 123                         | 3.57  | 96                             | 3.62  |
| Panama                | 63                                     | 4.76  | 88              | 4.81  | 61                          | 4.92  | 48                             | 4.56  |
| Paraguay              | 113                                    | 4.00  | 92              | 4.79  | 115                         | 3.97  | 109                            | 3.24  |
| Peru                  | 80                                     | 4.59  | 77              | 4.95  | 105                         | 4.32  | 53                             | 4.49  |
| Philippines           | 100                                    | 4.29  | 93              | 4.64  | 83                          | 4.58  | 95                             | 3.66  |
| Poland                | 60                                     | 4.81  | 44              | 5.31  | 122                         | 3.59  | 19                             | 5.52  |
| Portugal              | 30                                     | 5.23  | 40              | 5.32  | 54                          | 5.10  | 25                             | 5.28  |
| Qatar                 | 49                                     | 4.99  | 19              | 5.60  | 41                          | 5.28  | 75                             | 4.08  |
| Romania               | 71                                     | 4.68  | 76              | 4.96  | 95                          | 4.43  | 46                             | 4.64  |
| Russian Federation    | 65                                     | 4.71  | 70              | 5.05  | 104                         | 4.34  | 41                             | 4.74  |
| Serbia and Montenegro | 13                                     | 5.47  | 47              | 5.25  | 19                          | 5.92  | 26                             | 5.25  |
| Singapore             | 42                                     | 5.11  | 2               | 6.21  | 47                          | 5.20  | 79                             | 3.94  |
| Slovak Republic       | 18                                     | 5.37  | 10              | 5.78  | 71                          | 4.71  | 16                             | 5.62  |
| Slovenia              | 53                                     | 4.88  | 52              | 5.23  | 60                          | 4.99  | 57                             | 4.43  |
| South Africa          | 96                                     | 4.37  | 111             | 3.64  | 56                          | 5.08  | 59                             | 4.40  |
| Spain                 | 19                                     | 5.34  | 45              | 5.30  | 55                          | 5.09  | 17                             | 5.62  |
| Sri Lanka             | 70                                     | 4.69  | 84              | 4.84  | 70                          | 4.71  | 51                             | 4.51  |
| Suriname              | 112                                    | 4.02  | 97              | 4.48  | 97                          | 4.42  | 115                            | 3.17  |
| Sweden                | 27                                     | 5.27  | 31              | 5.43  | 99                          | 4.42  | 8                              | 5.96  |
| Switzerland           | 2                                      | 5.81  | 1               | 6.25  | 62                          | 4.88  | 6                              | 6.30  |
| Taiwan, China         | 23                                     | 5.32  | 15              | 5.69  | 17                          | 5.97  | 63                             | 4.29  |
| Tajikistan            | 105                                    | 4.18  | 87              | 4.82  | 90                          | 4.51  | 113                            | 3.19  |
| Tanzania              | 75                                     | 4.64  | 110             | 3.69  | 42                          | 5.28  | 34                             | 4.96  |
| Thailand              | 59                                     | 4.82  | 75              | 4.97  | 35                          | 5.43  | 77                             | 4.05  |
| Trinidad and Tobago   | 104                                    | 4.20  | 64              | 5.10  | 106                         | 4.30  | 111                            | 3.21  |
| Tunisia               | 37                                     | 5.15  | 22              | 5.54  | 50                          | 5.17  | 40                             | 4.75  |
| Turkey                | 48                                     | 5.00  | 65              | 5.09  | 43                          | 5.28  | 47                             | 4.63  |
| Uganda                | 66                                     | 4.70  | 109             | 3.88  | 18                          | 5.94  | 64                             | 4.29  |
| Ukraine               | 89                                     | 4.45  | 73              | 5.00  | 46                          | 5.21  | 118                            | 3.12  |
| United Arab Emirates  | 24                                     | 5.31  | 29              | 5.47  | 3                           | 6.53  | 80                             | 3.92  |
| United Kingdom        | 10                                     | 5.58  | 6               | 5.97  | 94                          | 4.43  | 5                              | 6.32  |
| United States         | 12                                     | 5.50  | 5               | 5.99  | 112                         | 4.09  | 3                              | 6.42  |
| Uruguay               | 64                                     | 4.75  | 51              | 5.23  | 64                          | 4.83  | 71                             | 4.20  |
| Venezuela             | 92                                     | 4.41  | 94              | 4.63  | 124                         | 3.52  | 33                             | 5.08  |
| Vietnam               | 76                                     | 4.63  | 81              | 4.92  | 51                          | 5.14  | 84                             | 3.84  |
| Zambia                | 72                                     | 4.67  | 115             | 3.40  | 6                           | 6.39  | 69                             | 4.23  |
| Zimbabwe              | 114                                    | 3.99  | 123             | 2.60  | 29                          | 5.56  | 87                             | 3.82  |

a sustainable way. China has a relatively good air transport infrastructure (ranked 36th), and ground transport infrastructure that is ranked 45th overall. However, its tourism infrastructure remains highly underdeveloped (ranked 113th). There are also some safety and security concerns (83rd), as well as issues related to health and hygiene (84th), with a low physician density and access to improved sanitation and drinking water that is low by international standards.

Barbados, at 29th, is the highest-ranked country in the Latin America and Caribbean region. Barbados is ranked 2nd overall with regard to national tourism perception, with a positive attitude toward tourists and toward the value of tourism in the country. The government is prioritizing the sector to a very high degree (ranked 2nd), spending a high percentage of government resources on the sector, and ensuring quality destination marketing campaigns. Further, the country has a regulatory environment that is quite conducive to the development of the sector, with low visa requirements and very open bilateral Air Service Agreements.

Costa Rica, ranked 41st, is second in the region. The country's strengths are in the area of natural resources, where it is ranked 12th with regard to the percentage of nationally protected areas. Its policy environment is extremely conducive to the development of the sector (ranked 17th), with very open bilateral Air Service Agreements, low visa requirements, and an environment that welcomes foreign investment. However, safety and security remains a concern (67th). And while tourism infrastructure is quite well developed (36), ground transport infrastructure remains highly underdeveloped (93rd), particularly roads and ports, making travel in the country somewhat difficult.

Mexico, in 49th place, gets quite high marks for its natural and cultural resources (ranked 29th) with nationally protected areas and a large number of World Heritage sites (ranking the country 7th). This "natural attractiveness" is reinforced by a relatively good policy environment for the development of Travel & Tourism, ranked 33rd overall with low visa requirements and low foreign ownership restrictions, for example. Mexico also has a relatively well developed air transport infrastructure (32nd), although its tourism infrastructure (47th) and ground transport infrastructure (62nd) get lower marks. And for a developing country, it has some weaknesses that are eroding at its price competitiveness—which is ranked a low 85th—in particular, very high ticket taxes and airport charges (ranked a very low 114th overall). Safety and security is also a major concern for the country, with high levels of crime and violence.

Brazil is ranked 59th overall. The country clearly benefits from some excellent cultural and natural resources, in particular many World Heritage sites. And the air transport network gets relatively high marks (28th), as well as measures of the dedicated tourism infrastructure (also 28th), such as the presence of major car rental

companies. However, the general ground transport network remains underdeveloped with the quality of roads, ports, and railroads ranked 96th, 88th, and 81st respectively. Safety and security also continues to be of serious concern, ranked 90th overall, as it is for a number of countries in the region. More generally, the overall policy environment is not particularly conducive to the development of the sector, ranked 75th, with, for example, highly stringent visa requirements and foreign ownership restrictions.

Among countries in the Middle East and North Africa region, the United Arab Emirates (UAE) ranks highest, at 18th, well ahead of the second-ranked country, Israel, at 32nd place. Although UAE ranks quite low with regard to natural and cultural resources (80th), it makes up for this with a number of strengths in other areas captured by the Index. For example, national tourism perception is rated 3rd in the world, with an extremely positive attitude toward foreign travelers and the attractiveness of the country for tourism. The country also does very well with regard to price competitiveness, ranked 8th in this area despite a very high price level. This is because of its very low ticket taxes and airport charges, low taxation more generally, and low fuel price levels in the country. The UAE's infrastructure also gets good marks, particularly its air transport infrastructure, which is ranked a very high 8th out of all countries assessed. The government is seen as prioritizing the sector strongly (ranked 4th) and carrying out very effective destination-marketing campaigns (ranked 1st).

Egypt, a country so rich in cultural heritage (with seven World Heritage sites), ranks a low 58th overall in the TTCI. And this is despite a number of clear strengths beyond the cultural richness. For example, Egypt has excellent price competitiveness, ranked 5th overall with low comparative prices, including fuel prices, as well as relatively low ticket taxes and airport charges. Further, the government is prioritizing the sector, with relatively high government spending on Travel & Tourism and ensuring the country's presence at major tourism fairs. This level of prioritization is reflected in some policy areas such as the favorable policy on visa requirements. On the other hand, the country's infrastructure is underdeveloped, particularly its tourism infrastructure (85th). An upgrading of the quality of the country's human resources available to work in the sector, ranked 69th, would also improve the country's overall T&T competitiveness.

Mauritius is by far the most competitive country in the sub-Saharan Africa region with regard to Travel & Tourism, ranked 39th overall. The general attitude of the population to foreign travelers is quite welcoming, and this is buttressed by great support by the government, which demonstrates the greatest prioritization of the industry of all countries analyzed. The country's tourism infrastructure is quite well developed, with a high concentration of hotel rooms and many major car rental

companies operating in the country. On the negative side, the policy environment could be improved; it is ranked a low 63rd in this area because of foreign ownership restrictions and rules on foreign direct investment, as well as a visa regime that could be simplified to allow foreign tourists to enter the country with less hassle (ranked 43rd).

The rest of the countries of sub-Saharan Africa are situated quite a bit lower in the rankings. South Africa is the region's second-strongest performer, ranked 62nd in the TTCI. The country is endowed with a significant number of World Heritage sites; its infrastructure is also relatively well developed, particularly its air and ground transport infrastructure. Some aspects of the regulatory environment are conducive to the sector's development, such as the excellent protection of property rights and visa requirements that are not extremely onerous. And the country is assessed as carrying out very effective destination marketing. However, there are also some areas of weakness that have brought down South Africa's overall ranking. Safety and security is of serious concern (ranked 95th), as well as health and hygiene, where it is ranked 82nd overall, with a low physician density and concerns about access to improved sanitation and drinking water.

### **Selected Issues of Travel & Tourism Competitiveness**

The *Report* also features a number of excellent contributions from T&T industry practitioners and experts, dealing with issues related directly to T&T competitiveness or broader industry themes. All are concerned with the importance of improving T&T environments for economic growth and development. These special studies are highly business relevant and complement the TTCI, the country profiles, and the data tables elsewhere in the *Report*.

In their chapter "Taking Travel & Tourism to the Next Level: Shaping the Government Agenda to Improve the Industry's Competitiveness," Jürgen Ringbeck and Stephan Gross of Booz Allen Hamilton employ the TTCI to analyze more in detail the results for countries at different stages of development to identify the key success factors for improving competitiveness in the T&T sector. They explore best practice examples in each of the defined peer groups, looking in detail at the T&T competitiveness of Hong Kong and Iceland, Estonia and the Slovak Republic, and Bulgaria and Egypt, as well as two growing markets: India and China. This section of the chapter presents a number of important lessons for countries wishing to improve their T&T competitiveness.

The authors identify liberalization and deregulation of the T&T industry as key factors for improving the industry's competitiveness—showing that countries that have liberalized have increased demand and industry efficiency and, hence, have achieved overall economic growth. Taking the European aviation sector as a case

study, the authors describe how, as a result of deregulation, all industry players were forced to improve efficiency and to expand their network at competitive prices to survive the pressure of new market entrants. They describe how Europe's experience with market deregulation provides valuable lessons that can be applied both domestically and internationally across borders.

The authors end the chapter with recommendations for countries at different stages of development, outlining the steps that need to be taken to improve their T&T competitiveness. They elaborate a framework for nations trying to build a highly competitive T&T sector, composed of several evolutionary steps. To begin, governments must first make sure the appropriate infrastructure capacity is in place to provide access for domestic and international travelers. Once the infrastructure is in place, governments should ensure that market demand is fully met—in terms of both service quality and quantity. They then argue that to increase performance efficiency of the T&T sector, governments should engage in deregulation and privatization to stimulate demand and growth. Following domestic deregulation, they favor a cross-border liberalization of a whole region's policy framework, which can effectively attract new market entrants and improve the industry's overall performance. In their view the last step would be a full intercontinental liberalization of travel regulations. Although this has not yet been reached, they hope this may become a reality in coming years. To succeed, governments must make a determined effort to work together hand-in-hand with the private sector to be able to fully leverage the T&T sector's potential to stimulate economic efficiency and growth.

In "Using Policy Measures and Economics to Improve Travel & Tourism-Related Policy and Business Decision Making," WTTC's Richard Miller explores the implications of the TTCI's results from a policy-making perspective. In particular, he looks at how the Index might be used by the T&T industry to engage in a useful dialogue with the public sector to improve T&T competitiveness.

The author describes WTTC's Tourism Satellite Accounting (TSA) economic research, the efforts it has taken to create a policy vision for T&T, and the qualitative and quantitative approaches it has taken to measure country-level performance. He then presents ideas about how the public sector should interpret and react to the TTCI's results in order to improve national T&T competitiveness. In particular, he points out that it will be important to take into account not only what the rankings indicate at a given point in time, but also how performance evolves over time, to get a sense of progress in particular areas.

Finally, Miller takes the analysis of the TTCI results a step further, comparing the Index scores with the TSA data. This analysis is aimed at assessing how countries' TTCI findings are correlated with the concept of risk

and return. The goal is to clarify how particular countries are perceived in this regard and to help them plan their strategy for decreasing risk, or increasing return, to make investment in the T&T environment more attractive in their respective countries.

In “Tourism Competitiveness and the Development Agenda,” Geoffrey Lipman and John Kester of the UNWTO reflect on the potential of the TTCI to contribute to increasing the awareness of the importance of the tourism sector in global and national socioeconomic activity—especially for the world’s poorest countries. They emphasize that by providing an overview of the factors driving the sector’s competitiveness, the Index will enhance tourism’s relevance for policymakers. Of particular interest is its potential for enhancing the competitiveness of the poorest countries and contributing to the Millennium Development Goals.

Although the Index rankings make clear the great competitive advantages that industrialized states currently enjoy in this sector, as the authors explain this also implies a significant potential for improving the competitiveness of the poorest. Although low-income countries are generally characterized by a number of disadvantages, such as low skill levels, poor infrastructure, and poor transport services, they also have important comparative advantages, such as excellent natural and cultural attributes, relatively unspoiled environments that can be attractive for ecotourism, and abundant, low-cost labor. Further, tourism is growing rapidly in many developing countries. The authors argue that the global development agenda obliges states to help proactively to reduce their disadvantages and enhance the comparative advantages.

They conclude with three recommendations. First, that there should be widespread adoption of the Tourism Satellite Account (UNWTO) to ensure routine provision of data on the macroeconomic importance of the sector for policymaking. Second, that tourism should be integrated more explicitly into development processes—particularly by including the sector in national Poverty Reduction Strategy Papers and in the overall support strategies of international aid agencies. Third, they argue that, given tourism’s importance for developing countries, there is a window of opportunity for tourism services to be taken more explicitly into account in the Doha Development Round of trade negotiations, and that this opportunity should not be missed.

In “Fulfilling the Promise: Positives and Potentials of Travel & Tourism,” Marilyn Carlson Nelson of Carlson examines the potential of Travel & Tourism to contribute positively to the world’s economies and societies, and explores whether the industry is living up to that potential.

With regard to economic development, the author notes that developed economies already benefit fully from Travel & Tourism’s potential, as the industry there is mature, strong, and resilient. And in developing countries, Travel & Tourism currently holds the promise of

further development, as the industry is growing very rapidly. Further, developing countries also benefit greatly from indirect effects of the industry, such as the infrastructure development so often needed in developing nations, and the tax revenue that can be used for development purposes that it generates. The author also discusses how the benefits of Travel & Tourism go beyond economic development. She explains, for example, that since the industry depends on a destination’s attractions and culture, it is in its interest to work for their preservation, creating an agenda of sustainability. Tourism also promotes improved cultural understanding among nations.

Nelson also highlights a number of challenges that remain to developing the sector and fulfilling its promise. These include security concerns, hostile regulatory environments, difficulties in attracting and retaining quality employees, legislation hindering the hiring of immigrant labor, and gender inequality in management. As well as challenges, she also explores a number of opportunities that exist, such as sharing best practices, building public-private partnerships, and practicing corporate social responsibility.

The author concludes by noting that although Travel & Tourism has accomplished much, and although it still holds much promise, it requires commitment and action. Specifically, governments must have a clear strategy, and they must work together with industry leaders to seek out barriers to tourism development and address them.

In his chapter “Electronic Payments: A Catalyst for Tourism and Economic Growth,” John Elkins of Visa International discusses how electronic payments have been an important driver of tourism in recent years. He also outlines the role that electronic payments will play in less-developed economies moving forward and how this will impact the T&T industry.

The chapter begins with an overview of some of the critical challenges facing the growth of the T&T industry in developing and less-developed economies—such as poor communication and transportation infrastructure, legal uncertainties over ownership, high taxes, and bureaucratic obstacles to business. It then puts forward some broad approaches that can be implemented to increase global T&T spending as well as improve access to this important source of wealth creation and growth. Approaches covered include potential government actions, the need for public and private organizations to act in partnership, the importance of the development of mobile commerce for all economies, and the need to shape a new mindset (within both government and the private sector) that recognizes the value of tourism as a spur to development.

Elkins goes on to highlight the great potential of electronic payments as a driver of economic development and an enabler of tourism growth. As he points out, payment cards and other electronic payment enablers are ubiquitous, secure, reliable, and convenient, and they make it easier for people to conduct business and easier



to travel. Further, with the introduction and application of new technologies such as mobile commerce, the economic opportunities that can be derived from electronic payment are expected to grow dramatically. Such technology advancements are a major asset for economies lacking the advanced telecommunications and physical infrastructure that have been important building blocks for growth in the past.

The chapter closes with an important message: what you get out of investment depends to a great extent on what you are willing to put into it. There are some vital infrastructure needs, as well as marketing, that must be met to ensure tourism growth.

In his chapter “Investing in Air Transport Connectivity to Boost National Productivity and Economic Growth,” Brian Pearce, Chief Economist at IATA, explores new evidence that the air transport network is a key capital asset that enhances productivity and supply-side economic growth. He points out that greater connections to the global air transport network, which is included as a pillar in the TTCI, do not just bring tourists into a country but are also important to the productivity of a country’s wider business sector. This network is an infrastructure asset connecting a country’s businesses to global markets and sources of inputs and ideas, offering the potential for boosting national productivity, economic growth, and living standards.

The author measures the quality of a country’s air transport network by its “connectivity” from the point of view of its businesses. This connectivity is defined as the scope of access between an individual airport or country and the global air transport network. It measures the number and economic importance of the destinations served, the frequency of service to each destination, and the number of onward connections available from each destination. Connectivity therefore increases as the range of destinations and/or frequency of service increases.

Pearce finds a clear positive relationship between higher levels of connectivity and higher levels of labor productivity. Quantifying this relationship through regression analysis, he finds that the estimated impact of connectivity on productivity is statistically significant and shows that a 10 percent rise in connectivity, relative to a country’s GDP, will boost long-term productivity by 0.07 percent. He further finds that investing in air transport capacity in developing or transition countries, where connectivity is currently relatively low, will have a much larger impact on their productivity and economic success than that same scale of investment in a relatively developed country. He explains that realizing these benefits will require investment in infrastructure but may also require the liberalization of markets and other institutional changes to bring about the rise in connectivity.

In “Long-Haul Hubs and the Future of Air Transport,” Maurice Flanagan, Executive Vice Chairman, Emirates Group, discusses the shifts in global air traffic flows from the dawn of modern commercial aviation to

the present day, and considers how the future of air transport might take shape. The author takes the development of Dubai in the United Arab Emirates as an example of the ways new long-haul hubs will enact their role in that future.

As a region, the Middle East enjoys a geocentric location that is a key advantage in facilitating and optimizing global air traffic flows east–west or north–south. Operating from a relatively lower cost base than airports and airlines in other parts of the world, traffic at airports in this region is surging. Passenger traffic at airports in the Middle East has outstripped all other regions. A tourism boom in the Middle East is also contributing to the region’s air traffic growth, powering the rapid expansion of airports and airlines.

The author argues that in the future of air transport, geo-centrally located long-haul hubs—particularly in the Middle East—are set to play an increasingly important role if the resources are invested in the constructive way that Dubai and some Gulf nations have done. He believes that European hubs will continue to play an important role in global air traffic flows, but that the rise of new long-haul hubs in the Middle East, combined with the advent of new ultra-long-haul aircraft, will influence these flows and affect the way travelers experience long-haul travel. Specifically, for global businesses and international travelers, the development and strengthening of long-haul hubs in the Middle East ultimately promises to deliver more air transport options and potentially more efficient ways to travel or to ship products to international markets.

In their chapter “The Challenge of Open Skies in the Middle East: How to Manage Competition in the High-Growth Air Transport Sector,” Samer Majali and Geoffrey Weston of Royal Jordanian Airlines also explore the air travel environment in the growing Middle East market. The authors describe seven drivers of change to the sector in the region that they have identified. The first force is the increased demand for air travel stimulated by the rapid growth in Middle Eastern economies. Second is an increasing relaxation of bilateral agreements among Middle Eastern states, which opens up international traffic. Third, several Middle Eastern governments are granting new operating licenses that directly increase the number of carriers, thus stimulating competition and expanding capacity. Fourth is the increasing reluctance of some states to subsidize the incumbent airline directly. Fifth is the rapid increase in the flows of labor from other regions to the Middle East. Sixth, several states in the Middle East are pursuing an economic policy that requires a strong airline at its core. The seventh driver concerns the infrastructure development that accompanies the strategic use of airlines as a wider economic policy.

The authors generally welcome these developments, as they see the virtuous circle of increased capacity, lowering fares, and stimulating demand for air transport supporting regional markets and strengthening their

relevance to the wider global economy. However, they point out that it is not clear whether these generally positive trends are leading to a genuinely fair competitive environment that will result in healthy and sustainable growth of the regional air transport sector. In this context, they call for progress in two areas.

The first area concerns the Middle East, where the evolution of a group of states that is committed internally to fair competition is deemed crucial. The authors stress that a fair and sustainable air transport sector in the region is something that all Middle Eastern airlines should aspire to in the medium to long term, as they each have a stake in a balanced and correctly structured market. They propose that those countries willing to agree to a fair competition environment should thus come together and campaign for comprehensive liberalization in the region. The second area, in parallel to the first, is the consideration that it is in the interests of nearby countries and regional blocs, such as the European Union, to support initiatives that lead to economically rational and stable outcomes. In this context, they call on the European Union to reconsider its current negotiating stance with regard to the further liberalization of ASAs, suggesting that it should deal differently with those states willing to engage in truly comprehensive negotiations within a framework of fair competition.

In “Driving Tourism Growth through Consumer-Centric Marketing,” Brad Corrodi of Rosetta Marketing Group discusses how changes in the structure of travel distribution have opened up new opportunities for collaboration between the public and private sectors to achieve tourism development objectives. He describes how travel suppliers, tourist boards, and commercial intermediaries can radically improve the productivity of their marketing spending while accelerating sustained, profitable growth. The author draws on experiences with both government tourist boards and commercial travel companies to distill the core engine of sustainable tourism growth—a consumer awareness and experience “feedback loop.” Destinations must drive consumer awareness in key source markets, with consistent messaging and brand positioning—and then visitors to these destinations must find the experience consistent with the brand promise.

Unfortunately, the author notes that there are many cases where substantial investments in destination infrastructure and tourism marketing have not led to such positive feedback “turbocharged growth,” and identifies five of the most common pitfalls. Most stem from the difficulty that public and private sectors have had in collaborating to define target consumer groups and creating effective marketing capabilities to reach them. As a result, tourism marketing has fallen far behind the levels of productivity achieved in other industries.

However, Corrodi notes that over the last three years the structure of the travel distribution value chain has changed radically, opening new ways for multiple

public and private stakeholders to collaborate in destination marketing. Rapid growth in consumers’ online travel research activity, increased transparency into the travel-buying process, and innovative new intermediary business models all make it much easier (and practical) for suppliers and government tourism ministries to develop consumer-marketing programs that take advantage of leading marketing techniques developed in other industries. Specific actions and enablers for such marketing programs are also identified. He concludes by stressing that the destinations that are able to work together with a broad range of stakeholders toward a common set of marketing objectives will likely be the ones to ensure that the tourism sector delivers its substantial social and economic development potential, as Google and others turn travel consumer access into a true global marketplace.

Part 2 of the *Report* is a comprehensive data section that includes country/economy profiles for each of the 124 economies covered, as well as data tables for each of the individual variables used to assess national T&T competitiveness. Each section is preceded by a description of how to interpret the data provided. Technical notes, included at the end of Part 2, provide details on the characteristics and sources of the individual hard data variables included in the *Report*.

## Notes

- 1 UNWTO, *Historical Perspective of World Tourism*, available online at <http://www.unwto.org/facts/menu.html>.
- 2 WTTC 2006a.
- 3 UNWTO, *Historical Perspective of World Tourism*, available online at <http://www.unwto.org/facts/menu.html>.
- 4 2006 Tourism Satellite Accounting research of the World Travel & Tourism Council (WTTC) and Accenture.
- 5 See UNCED (1992).

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- UNWTO (World Tourism Organization). *Historical Perspective of World Tourism*. Available at [www.unwto.org/facts/menu.html](http://www.unwto.org/facts/menu.html).
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# Part 1

## Selected Issues of T&T Competitiveness



# The Travel & Tourism Competitiveness Index: Assessing Key Factors Driving the Sector's Development

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Travel & Tourism (T&T) is a critical source of economic growth and development in many countries around the world, rendering the measurement of its competitiveness an important undertaking. Over the past several decades, Travel & Tourism has become a key sector in the world economy. In 1950, international tourism receipts totaled a mere US\$2.1 billion; by 2004 this had grown to an impressive US\$622.7 billion.<sup>1</sup> Tourism has become an extremely important employment and revenue generator internationally, providing jobs directly through the tourism industry itself (for example, hotels, visitor attractions, restaurants, tourist transport, and so on) and indirectly through the supply of many goods and services that are inputs to the tourism industry.<sup>2</sup> In addition, there are many local revenue-generating activities that are not formally registered in the national accounts (for example, informal employment such as street vendors and informal guides). This indirect tourism revenue has been estimated to have a magnitude equal to that of direct tourism expenditures.<sup>3</sup>

By 2006, the T&T sector accounted for 234 million jobs or 8.2 percent of total employment worldwide, as well as 10.3 percent of world GDP.<sup>4</sup> And the sector continues to grow. The World Travel & Tourism Council (WTTC) estimates that in 2006 the T&T sector contributed 2.5 million new jobs worldwide. When taking into account both the direct and indirect impact of the industry as described above, Travel & Tourism created nearly 10 million new jobs globally.<sup>5</sup>

Behind these revenue and employment figures is the large and growing number of international travelers. According to the World Tourism Organization (UNWTO), the number of international arrivals grew from 25 million in 1950 to an estimated 763 million in 2004, corresponding to an average annual growth rate of 6.5 percent.<sup>6</sup> In the first eight months of 2006, international tourist arrivals totaled 578 million worldwide, up by 4.5 percent from 553 million in the same period of 2005—a year that saw a record 806 million people traveling internationally. This growth is expected to continue in 2007 at a pace of approximately 4 percent worldwide.<sup>7</sup>

The industry is one of the world's largest economic activities: it is the main industry in many countries, as well as the fastest-growing economic sector in terms of foreign exchange earnings and job creation according to the UNWTO. In other words, Travel & Tourism is an important driver of growth and prosperity and, particularly within developing countries, the sector is also important for poverty reduction. The World Trade Organization (WTO) estimates that developing countries derive over 43 percent of their total services trade

The authors would like to thank Thierry Geiger for his excellent research assistance in developing the Travel and & Tourism Competitiveness Index and preparing the present chapter. They would also like to thank Irene Mia for valuable input into the project over the past year.

revenue from tourism exports, and Least Developed Countries (LDCs) derive more than 70 percent.<sup>8</sup> According to WTTC research, most new jobs in developing countries are created in tourism industries.<sup>9</sup> In addition, Travel & Tourism can help diversify economic activity, enabling countries to redistribute wealth and jobs from core and urban areas to rural and regional communities.<sup>10</sup> More generally, Travel & Tourism creates important backward linkages with products and services sourced locally, producing beneficial effects for the local economy as a whole.

Tourism also has important indirect positive development effects. For example, it can encourage governments to make infrastructure improvements such as better water and sewage systems, roads, electricity networks, and telephone and public transport networks, all of which can improve the economy's development prospects and the quality of life for residents, as well as facilitate tourism. According to the WTTC, the public and private sector combined are expected to spend US\$1,010.7 billion in new T&T capital investment, or 9.3 percent of total worldwide capital investment.<sup>11</sup>

The development of the T&T industry also has important implications for the natural environment. The interdependence of tourism on the quality of the environment places it in a special position in terms of environmental sustainability, as tourism provides direct returns to environmental protection. As highlighted at the 1992 United Nations Conference on Environment and Development (UNCED) Earth Summit, the T&T industry has the potential to make a positive contribution to the quality of the natural environment. This can take place, for example, by providing the opportunity to communicate the value of the natural environment to residents, by creating business incentives for environmental improvements such as cost savings from adopting waste- and energy-minimization practices, and by raising awareness of environmental issues and encouraging tourists to advocate for environmental conservation.<sup>12</sup>

And the T&T sector serves an important diplomatic as well as a development purpose, as it provides an important tool for furthering cultural understanding. National reputation is enhanced as the individuals who visit countries develop a more positive impression than those who have not done so, enabling countries to foster their "national brand." This can also lead to investment opportunities by enabling potential investors to develop a better understanding and impression of the country.

The critical importance of fostering the T&T sector is thus quite clear, yet a variety of national regulatory and other obstacles remain in many countries, hindering its development. In order to shed some light on these issues, the World Economic Forum has embarked on an effort to identify the specific levers for improving T&T competitiveness in countries around the world. The goal is twofold. First, by providing a cross-country analysis of the drivers of T&T competitiveness, the study intends

to provide the industry with useful comparative information, and an important benchmarking tool, for making decisions related to business/industry development. Second, and more importantly, the analysis provides an opportunity for the T&T industry to highlight to national policymakers the obstacles to T&T competitiveness that require policy attention, and to enable dialogue between the private and public sectors for improving the environment for developing the T&T industry at the national level. The next section will describe the new Index we have developed aimed at providing such a tool.

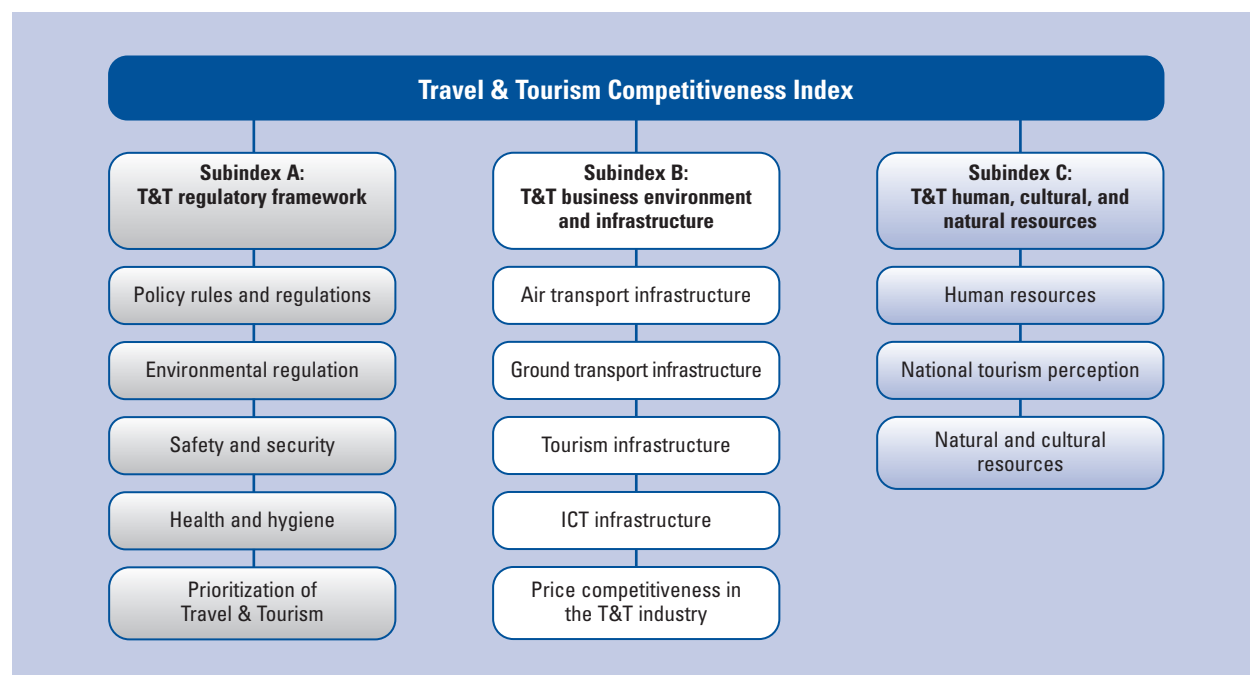
### The Travel & Tourism Competitiveness Index

The Travel & Tourism Competitiveness Index (TTCI) has been developed within the context of the World Economic Forum's Industry Partnership Programme for the Aviation, Travel and Tourism sector. The TTCI aims to measure the factors and policies that make it attractive to develop the T&T sector in different countries. The Index was developed between September 2005 and October 2006 by the World Economic Forum in close collaboration with our strategic design partner Booz Allen Hamilton, and our data partners the International Air Transport Association (IATA), the UNWTO, and the WTTC. We have also received important feedback from a number of key companies that are industry partners in the undertaking, namely Bombardier, Carlson Companies, Emirates Group, Qatar Airways, Royal Jordanian Airlines, Silversea Cruises Group, Swiss International Airlines and Visa International.

The TTCI builds upon the work carried out by the WTTC at the beginning of this decade. For three years, between 2001 and 2004, the WTTC's Competitiveness Monitor tracked a range of issues, aiming to measure the extent to which a country offers a competitive environment for Travel & Tourism development. The Monitor included a number of indexes, capturing concepts critical to the development of the T&T industry such as price competitiveness, infrastructure, human resources, the environment, and technology.

Although the Competitiveness Monitor was well received by the international community, it remained somewhat limited in scope. In this context, the WTTC decided that joining efforts with the World Economic Forum and other industry organizations would provide access to a greater breadth of data and would better ensure the optimal use of the findings in promoting public-private dialogue with the goal of improving the T&T environments of countries. Thus, the TTCI should be seen as a natural extension of the work previously carried out within the context of the Monitor, enhanced by further economic data and input from a variety of industry experts.<sup>13</sup>

The TTCI is based on three broad categories of variables that facilitate or drive T&T competitiveness.

**Figure 1: Composition of the three subindexes of the TTCI**

These categories are summarized into the three subindexes of the Index: (1) the T&T regulatory framework subindex, (2) the T&T business environment and infrastructure subindex, and (3) the T&T human, cultural and natural resources subindex. The first subindex captures those elements that are policy-related and generally under the purview of the government; the second subindex captures elements of the business environment and the infrastructure of each economy; and the third subindex captures the human and cultural elements of each country's resource endowments.

Each of these three subindexes is composed in turn by a number of "pillars" of T&T competitiveness, of which there are 13 in all. These are:

1. *Policy rules and regulations*
2. *Environmental regulation*
3. *Safety and security*
4. *Health and hygiene*
5. *Prioritization of Travel & Tourism*
6. *Air transport infrastructure*
7. *Ground transport infrastructure*
8. *Tourism infrastructure*
9. *ICT infrastructure*
10. *Price competitiveness in the T&T industry*
11. *Human resources*
12. *National tourism perception*
13. *Natural and cultural resources*

Figure 1 summarizes the structure of the overall Index, showing how the 13 component pillars are allocated within the three subindexes.

Each of the pillars is, in turn, made up of a number of individual variables. The dataset includes both hard data and Survey data from the World Economic Forum's annual Executive Opinion Survey. The hard data were obtained from publicly available sources, international T&T institutions, and T&T experts (for example, IATA, the International Civil Aviation Organization or ICAO, UNWTO, WTTC, and the United Nations Educational, Scientific and Cultural Organization or UNESCO). The Survey is carried out among CEOs and top business leaders in all economies covered by our research; these are the people making the investment decisions in their respective economies. The Survey provides unique data on many qualitative institutional and business environment issues. Further, for the purposes of this study and this specific Report, a number of new questions related to T&T competitiveness were added to the Survey on issues such as the quality of destination marketing and the government's prioritization of the T&T industry. These questions provide us with entirely new data related to T&T competitiveness.

The *policy rules and regulations* pillar captures the extent to which the policy environment is conducive to developing the T&T sector in each country. Governments can have an important impact on the attractiveness of developing this sector, depending on whether the policies that they create and perpetuate support or hinder its development. Sometimes well-intentioned policies can

end up creating red tape or obstacles that have the opposite effect than that which was intended. In this pillar we take into account the extent to which foreign ownership and foreign direct investment are welcomed and facilitated by the country, how well property rights are protected, the extent to which visa requirements make it complicated for visitors to enter the country, and the openness of the bilateral Air Service Agreements into which the government has entered with other countries.

The importance of the natural environment for providing an attractive location for tourism cannot be overstated, and it is clear that effective *environmental regulation* is crucial for ensuring that a country will continue to be an attractive destination going into the future. In this pillar we measure the stringency of the government's environmental regulations in each country, as well as the extent to which the regulatory environment is stable and clear, facilitating implementation. And given the environmental impacts that tourism itself can sometimes bring about, we also take into account the extent to which governments prioritize the sustainable development of the T&T industry in their respective economies.

*Safety and security* is a critical factor determining the competitiveness of a country's T&T industry. Tourists are likely to be deterred from traveling to dangerous countries or regions, making the T&T sector less attractive to develop in those places. Here, we take into account the costliness of common crime and violence as well as terrorism, and the extent to which police services can be relied upon for protection from crime.

*Health and hygiene* is also an important factor driving T&T competitiveness. Very important is the access within the country to improved drinking water and sanitation for the comfort and health of travelers. And in the event that tourists do become ill, it is important that the country's health sector can ensure they are properly cared for. With regard to prevention, recent scares—related for example to SARS and the threat of bird flu—have also highlighted the importance of government efforts to reduce the health risks from pandemics.

The extent to which the government *prioritizes the T&T sector* also has an important impact on T&T competitiveness. By making clear that T&T is a priority sector, and by reflecting this in its budget priorities, the government can channel needed funds to essential development projects. It also sends a signal of its intentions, which can have positive spillover effects, such as attracting further private investment into the sector. Prioritization of the sector can be reflected in a variety of other ways as well, such as ensuring the country's attendance at international T&T fairs and commissioning high-quality "destination-marketing" campaigns.

The *air transport infrastructure* is very important for providing ease of access to and from countries, as well as for movement to destinations within countries. In this

pillar we measure both the quantity of air transport, as measured by the available seat kilometers, the number of aircraft departures, airport density, and the number of operating airlines, as well as the quality of the air transport infrastructure both for domestic and international flights.

Vital for ease of movement within the country is the extensiveness and quality of the country's *ground transport infrastructure*. Very important is the quality of roads, railroads, and ports, as well as the extent to which the national transport network offers efficient, accessible transportation to key business centers and tourist attractions within the country.

We have also included a pillar that captures a number of aspects of the general *tourism infrastructure* in each country, as distinct from the general transport infrastructure. This includes a measure of the accommodation infrastructure (the number of hotel rooms) and the presence of major car rental companies in the country, as well as a measure of the financial infrastructure for tourists in the country (the availability of automatic teller machines, or ATMs).

Given the increasing importance of the online environment for the modern T&T industry, for planning itineraries and purchasing travel and accommodations, we also capture the quality of the *ICT infrastructure* in each economy. Here we measure ICT penetration rates (Internet and telephone lines), which provide a sense of the society's online activity. We also include a specific measure of Internet use by businesses in carrying out transactions in the economy, to get a sense of the extent to which these tools are in fact being used for business (including T&T) transactions in the economy.

The *price competitiveness in the T&T industry* is clearly an important element of T&T competitiveness, with lower costs increasing the attractiveness of some countries for many travelers. To measure countries' price competitiveness, we take into account factors such as airfare ticket taxes and airport charges (which can make air travel much more expensive), fuel price levels compared with those of other countries, taxation in the country (which can be passed through to travelers), and the extent to which goods and services in the country are more or less expensive than elsewhere (purchasing power parity).

It is also very important to have quality *human resources* in the economy, ensuring that the industry has access to the collaborators it needs to develop and grow, and who can communicate effectively. This pillar takes into account the health and the education and training levels in each economy, and is made up of three specific subpillars. The education and training subpillar measures educational attainment rates (primary and secondary), as well as the overall quality of the educational system in each country, as assessed by the business community. As well as the formal educational system, we also take into account private-sector involvement in upgrading human

resources, including the availability of specialized training services and the extent of staff training by companies in the country. The subpillar measuring the availability of qualified labor further takes into account the extent to which hiring and firing is impeded by regulations, and whether labor regulations make it easy or difficult to hire foreign labor. Finally, the workforce wellness subpillar measures the health of the workforce, taking into account health indicators such as the prevalence of specific diseases and inhabitants' average life expectancy in the country.

The *national tourism perception* pillar measures the extent to which the country and society are open to tourism and foreign visitors. It is clear that the general attitude of the population to travel and to foreign visitors has an important impact on T&T competitiveness. In particular we provide a measure of the extent to which people in the country are welcoming to foreign travelers, a measure of the extent to which business leaders are willing to recommend leisure travel in their countries to important business contacts, and a measure of tourism openness (tourism expenditures and receipts as a percentage of GDP), which provides a sense of the importance of tourism relative to the country's overall size.

Finally, it is also clear that *natural and cultural resources* are a critical driver of T&T competitiveness around the world. Countries that are able to offer travelers access to natural or cultural assets clearly have a competitive advantage. In this pillar we include a measure of cultural heritage (the number of UNESCO World Heritage sites), environmental attractiveness measures—including environmental damage and the percentage of nationally protected areas—and a measure of health risks, in particular the risk of tropical diseases.

These 13 pillars are regrouped into the three subindexes described above, as shown in Figure 1, and the overall score for each country is derived as an unweighted average of the three subindexes. The details of the composition of the TTCI are shown in the appendix to this chapter.

Based upon data availability, this year the TTCI measures the T&T competitiveness for 124 economies, covering all of the world's regions and accounting for approximately 90 percent of the world's population and 98 percent of world GDP.

## The Travel & Tourism Competitiveness Index rankings 2007

The rankings from this year's TTCI are shown in Tables 1 through 4, providing a summary of the T&T competitiveness of each country. As would be expected, the rankings are highly correlated with a number of T&T indicators. For example, Figures 2 and 3 show the correlation between the TTCI and tourist arrivals, and between the TTCI and tourism receipts, respectively (both shown in log form) in 2005. As the figures show,

the index is highly correlated with both the number of tourists actually traveling to various countries, as well as the annual income generated from Travel & Tourism. This supports the idea that the TTCI captures factors that are important for developing the T&T industry in countries.

The rest of this section will discuss some of the highlights of the rankings in a regional context, grouping countries into the following five regional groups: Europe and North America, Asia, Latin America and the Caribbean, Middle East and North Africa, and sub-Saharan Africa. For further details for each of the 124 economies included in this Index, we provide two-page profiles in section 2 of the *Report*. The profiles show the rankings on each subindex and pillar, as well as "T&T competitiveness balance sheets," which separate each of the 58 factors included in the TTCI into T&T competitive strengths and weaknesses.

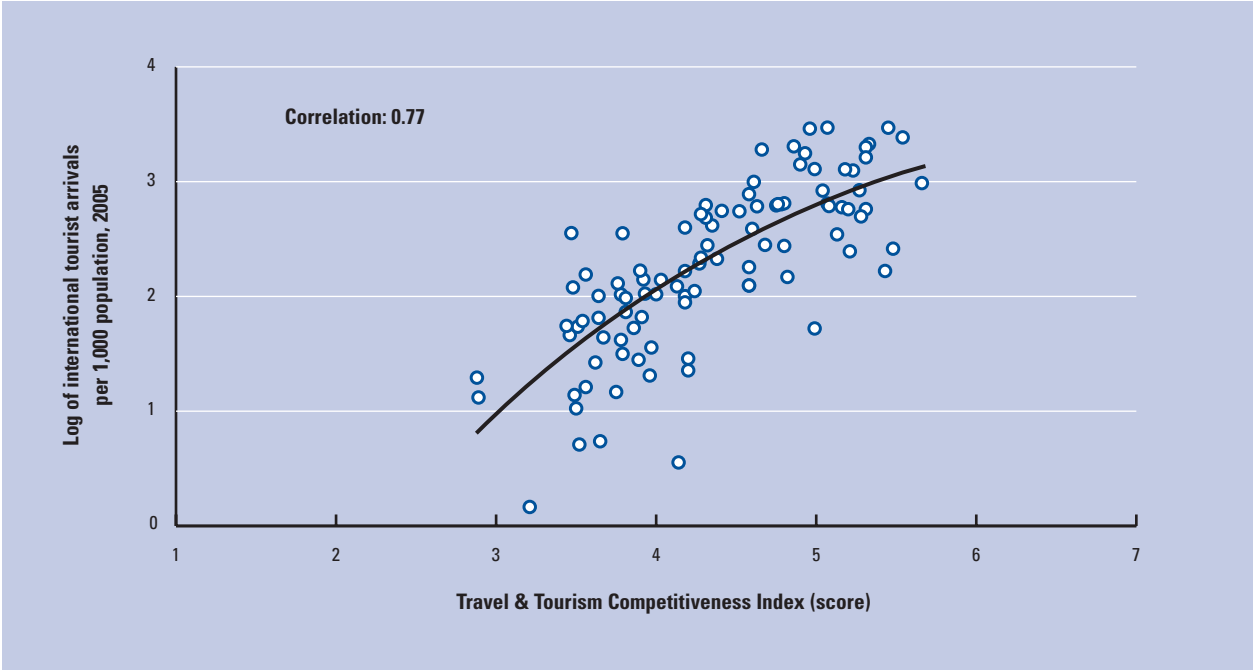
### Europe and North America

As shown in Table 1, most of the countries in the top 10 rankings hail from Europe and North America. The top spot is held by **Switzerland**, followed closely by Austria and Germany. Switzerland owes its position at the top to strengths in all areas covered by the Index. As is well known, Switzerland is an extremely safe country, with excellent health and hygiene indicators and environmental regulation that is among the most stringent and effective in the world. And in a country that has some of the most well regarded hotel management schools in the world, the quality of the country's human resources is second to none, ensuring an adequate supply of high-quality staff for the industry. The transport and tourism infrastructure (both ground and air transport) are also among the best in the world, making it very easy and comfortable for visitors to move around the country. Further, the country's natural and cultural resources are among the richest in the world. Switzerland is home to six World Heritage sites, a significant number for such a small country, and nearly 30 percent of the land area of the country is protected.

Given the importance of policy in driving T&T competitiveness, it is also notable that Switzerland—together with Spain—is one of the only two high-income countries among the top 10 with regard to the prioritization of Travel & Tourism. In other words, Switzerland has a number of underlying strengths that are reinforced by political will. All of this comes together to make Switzerland a very attractive place to develop the T&T sector. Regarding weaknesses, Switzerland is assessed as one of the most high-cost economies for the sector, ranked 115th overall. Although this is primarily because of the general costliness in the economy, Switzerland also ranks 59th with regard to airport charges and taxes; these could be reduced to improve the price competitiveness of the country, and thus improve the country's T&T competitiveness even further.

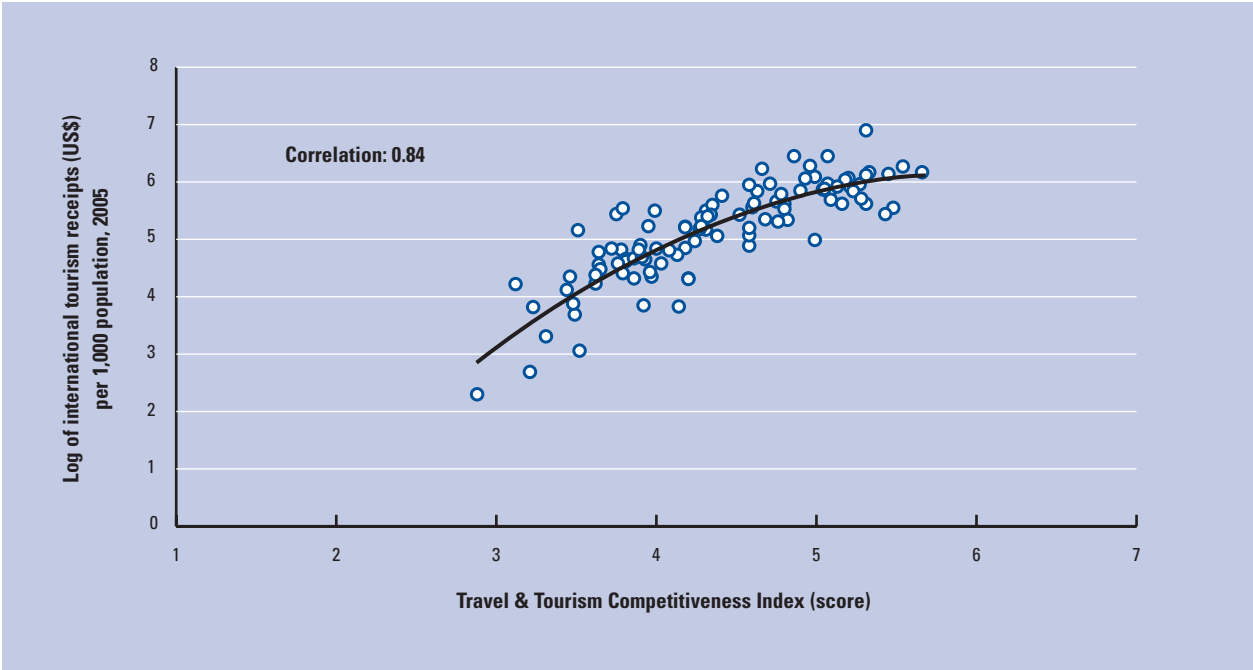


Figure 2: T&T competitiveness and tourist arrivals



Source: United Nations World Tourism Organization; World Economic Forum.

Figure 3: T&T competitiveness and tourism receipts



Source: United Nations World Tourism Organization; World Economic Forum.

**Austria and Germany** share a number of characteristics with regard to their own T&T environments. For example, both countries are among the top three countries, together with Denmark, in the quality of their environmental regulation; and they are among the top four in terms of safety and security in the country, with very low crime and violence and reliable police services. Most strikingly they hold the top two spots in the area of natural and cultural resources, ranks attributable to several World Heritage sites in both countries (especially in Germany) and to large nationally protected national parks and such areas. But there are some nuances. For example, Germany is rated as doing somewhat better with the quality of transport infrastructure, particularly ground transport infrastructure, where it is rated number 1; Austria's tourism-specific infrastructure is rated as the best in the world, ahead of Germany's. And Austria also outperforms Germany quite strongly in the country's prioritization of Travel & Tourism.

The **United States** is ranked 5th in the index. It is among the top three of the 124 countries covered regarding natural and cultural resources, with a large number of World Heritage sites (20 of them) as well as a high percentage of protected land area, making the country an attractive destination. Some aspects of the policy environment are also favorable, such as the strong property rights in the country, although other policies, such as the relatively stringent visa regime, have become a hindrance to attracting foreign visitors to the country. The country also has an excellent infrastructure and business environment for Travel & Tourism, ranked number 1 in the overall subindex, and it has the most well developed air transport infrastructure in the world, by a significant margin, as well as excellent tourism infrastructure (ranked 3rd) and very good ground transport infrastructure. The country's human resources also get excellent marks (ranked 5th overall). It should be noted, however, that hiring foreign labor is highlighted as somewhat difficult (ranked 43rd). This is an area of concern because of the seasonality of much of the tourism labor force. Among the country's weaknesses are in particular what is perceived to be a generally negative attitude toward tourists (ranked 101st), as well as a lack of prioritization of the sector by the government (84th). Safety and security is also a relatively more important problem than it is in many other countries of the same income level (the United States is ranked 45th), mainly because of fears about terrorist threats in the country.

**Canada** is ranked 7th in the TTCI, with excellent air transport infrastructure (second only to the United States), and very good ground transport and ICT infrastructure, facilitating the online T&T environment. Canada has a large number of World Heritage sites (13), which attract visitors. And there is a greater prioritization of the T&T industry within Canada than there is in the United States. The country also does comparatively well with the quality of its human resources, providing

well-educated and healthy workers to the industry. Interestingly, health and hygiene is a relative weakness for the country, ranked 38th overall, attributable mainly to a somewhat low physician density in the country (ranked 48th).

**France**, the most traveled-to destination in the world, is ranked just outside the top 10 at 12th place. The country's strengths lie in areas such as natural and cultural resources (for example, it has 30 World Heritage sites, among the highest in the world), the quality of the air and ground transport infrastructure (both ranked 4th), and health and hygiene (9th). However, these strengths are offset by weaknesses such as the country's policy rules and regulations (ranked 40th), and most particularly, issues related to national tourism perception, specifically the perceived attitude of the citizens toward visitors (ranked a very low 122 overall).

**Spain**, a country that has seen an impressive increase in tourism over the years, is ranked 15th overall, just behind France within Europe. Spain's strengths can be traced to its excellent tourism infrastructure (ranked 2nd, just behind Austria) and air transport infrastructure (ranked 7th), as well as excellent natural and cultural resources (with the second-highest number of World Heritage sites in the world (39—second only to Italy). And Spain is notably ranked 3rd overall with regard to the prioritization of the T&T sector by the country—it is the top-ranked European country in this area, demonstrating the recognition within Spain of the sector as an important driver of economic growth. However, interestingly, the accompanying policy environment is ranked a relatively low 45th overall, due for example to somewhat stringent visa requirements (as in other Schengen countries), and a lack of openness within the Air Service Agreements into which the country has entered (ranked 80th).

**Greece** is ranked 24th overall, with very attractive cultural resources, excellent health and hygiene (ranked 3rd overall), and a safe and secure environment (18th). Further, there is a strong national tourism perception compared with many other European countries, with a generally open and positive attitude toward tourists, as well as a higher prioritization of the T&T sector by the government (22nd) than many European countries. The country's overall ranking is held back, however, by its regulatory environment (ranked 57th, with stringent rules governing foreign direct investment and foreign ownership restrictions as well as visa requirements for visitors from many countries). Another area of weakness is the country's air and ground transport infrastructure, which are characterized as less efficient than in many other European countries. Human resources (ranked 55th) is another area of concern, with, for example, insufficient training available in the country.

**Italy**, the country with the highest number of World Heritage sites in the world (43), ranks a mediocre 33rd in the TTCI ranking. Unsurprisingly, the country

Table 1: The Travel &amp; Tourism Competitiveness Index

| Country/Economy       | SUBINDEXES    |       |                      |       |                                         |       |                                        |       |
|-----------------------|---------------|-------|----------------------|-------|-----------------------------------------|-------|----------------------------------------|-------|
|                       | OVERALL INDEX |       | Regulatory framework |       | Business environment and infrastructure |       | Human, cultural, and natural resources |       |
|                       | Rank          | Score | Rank                 | Score | Rank                                    | Score | Rank                                   | Score |
| Switzerland           | 1             | 5.66  | 2                    | 5.80  | 2                                       | 5.36  | 2                                      | 5.81  |
| Austria               | 2             | 5.54  | 3                    | 5.79  | 12                                      | 4.97  | 1                                      | 5.86  |
| Germany               | 3             | 5.48  | 6                    | 5.62  | 3                                       | 5.23  | 6                                      | 5.61  |
| Iceland               | 4             | 5.45  | 5                    | 5.69  | 8                                       | 5.04  | 5                                      | 5.61  |
| United States         | 5             | 5.43  | 33                   | 5.06  | 1                                       | 5.74  | 12                                     | 5.50  |
| Hong Kong SAR         | 6             | 5.33  | 4                    | 5.75  | 14                                      | 4.81  | 14                                     | 5.44  |
| Canada                | 7             | 5.31  | 15                   | 5.31  | 4                                       | 5.22  | 16                                     | 5.40  |
| Singapore             | 8             | 5.31  | 1                    | 5.81  | 11                                      | 5.01  | 42                                     | 5.11  |
| Luxembourg            | 9             | 5.31  | 17                   | 5.28  | 9                                       | 5.04  | 8                                      | 5.60  |
| United Kingdom        | 10            | 5.28  | 21                   | 5.20  | 6                                       | 5.08  | 10                                     | 5.58  |
| Denmark               | 11            | 5.27  | 8                    | 5.46  | 16                                      | 4.76  | 9                                      | 5.59  |
| France                | 12            | 5.23  | 13                   | 5.34  | 5                                       | 5.10  | 28                                     | 5.27  |
| Australia             | 13            | 5.21  | 16                   | 5.28  | 10                                      | 5.04  | 26                                     | 5.30  |
| New Zealand           | 14            | 5.20  | 10                   | 5.44  | 20                                      | 4.57  | 7                                      | 5.60  |
| Spain                 | 15            | 5.18  | 25                   | 5.15  | 7                                       | 5.05  | 19                                     | 5.34  |
| Finland               | 16            | 5.16  | 7                    | 5.61  | 18                                      | 4.68  | 33                                     | 5.18  |
| Sweden                | 17            | 5.13  | 19                   | 5.25  | 13                                      | 4.88  | 27                                     | 5.27  |
| United Arab Emirates  | 18            | 5.09  | 18                   | 5.28  | 19                                      | 4.68  | 24                                     | 5.31  |
| Netherlands           | 19            | 5.08  | 22                   | 5.17  | 15                                      | 4.77  | 25                                     | 5.30  |
| Cyprus                | 20            | 5.07  | 29                   | 5.09  | 23                                      | 4.50  | 3                                      | 5.62  |
| Belgium               | 21            | 5.07  | 24                   | 5.16  | 29                                      | 4.41  | 4                                      | 5.62  |
| Portugal              | 22            | 5.05  | 11                   | 5.40  | 22                                      | 4.50  | 30                                     | 5.23  |
| Norway                | 23            | 5.04  | 9                    | 5.45  | 21                                      | 4.56  | 40                                     | 5.12  |
| Greece                | 24            | 4.99  | 20                   | 5.21  | 32                                      | 4.36  | 15                                     | 5.41  |
| Japan                 | 25            | 4.99  | 28                   | 5.10  | 17                                      | 4.71  | 38                                     | 5.15  |
| Malta                 | 26            | 4.96  | 23                   | 5.16  | 31                                      | 4.37  | 21                                     | 5.33  |
| Ireland               | 27            | 4.93  | 14                   | 5.32  | 26                                      | 4.44  | 46                                     | 5.03  |
| Estonia               | 28            | 4.90  | 32                   | 5.07  | 25                                      | 4.45  | 34                                     | 5.18  |
| Barbados              | 29            | 4.86  | 31                   | 5.08  | 36                                      | 4.14  | 17                                     | 5.38  |
| Taiwan, China         | 30            | 4.82  | 45                   | 4.73  | 28                                      | 4.43  | 23                                     | 5.32  |
| Malaysia              | 31            | 4.80  | 27                   | 5.12  | 27                                      | 4.44  | 57                                     | 4.84  |
| Israel                | 32            | 4.80  | 36                   | 4.93  | 33                                      | 4.28  | 35                                     | 5.18  |
| Italy                 | 33            | 4.78  | 42                   | 4.77  | 30                                      | 4.38  | 32                                     | 5.18  |
| Tunisia               | 34            | 4.76  | 12                   | 5.34  | 47                                      | 3.77  | 37                                     | 5.15  |
| Czech Republic        | 35            | 4.75  | 40                   | 4.80  | 37                                      | 4.13  | 22                                     | 5.32  |
| Qatar                 | 36            | 4.71  | 34                   | 5.04  | 39                                      | 4.10  | 49                                     | 4.99  |
| Slovak Republic       | 37            | 4.68  | 37                   | 4.86  | 45                                      | 3.81  | 18                                     | 5.37  |
| Croatia               | 38            | 4.66  | 58                   | 4.37  | 40                                      | 4.06  | 11                                     | 5.55  |
| Mauritius             | 39            | 4.63  | 35                   | 4.96  | 46                                      | 3.77  | 39                                     | 5.15  |
| Hungary               | 40            | 4.61  | 26                   | 5.15  | 51                                      | 3.71  | 51                                     | 4.98  |
| Costa Rica            | 41            | 4.60  | 39                   | 4.80  | 52                                      | 3.66  | 20                                     | 5.34  |
| Korea, Rep.           | 42            | 4.58  | 46                   | 4.61  | 24                                      | 4.46  | 73                                     | 4.67  |
| Thailand              | 43            | 4.58  | 41                   | 4.78  | 35                                      | 4.14  | 59                                     | 4.82  |
| Slovenia              | 44            | 4.58  | 44                   | 4.74  | 38                                      | 4.11  | 53                                     | 4.88  |
| Chile                 | 45            | 4.58  | 38                   | 4.83  | 42                                      | 3.87  | 47                                     | 5.03  |
| Jordan                | 46            | 4.52  | 30                   | 5.09  | 54                                      | 3.65  | 58                                     | 4.82  |
| Bahrain               | 47            | 4.45  | 61                   | 4.24  | 34                                      | 4.24  | 54                                     | 4.86  |
| Jamaica               | 48            | 4.41  | 49                   | 4.54  | 59                                      | 3.53  | 36                                     | 5.17  |
| Mexico                | 49            | 4.38  | 48                   | 4.55  | 57                                      | 3.60  | 50                                     | 4.98  |
| Dominican Republic    | 50            | 4.35  | 51                   | 4.52  | 71                                      | 3.28  | 29                                     | 5.24  |
| Lithuania             | 51            | 4.34  | 57                   | 4.39  | 43                                      | 3.84  | 61                                     | 4.79  |
| Turkey                | 52            | 4.32  | 53                   | 4.45  | 63                                      | 3.49  | 48                                     | 5.00  |
| Latvia                | 53            | 4.31  | 60                   | 4.32  | 41                                      | 4.00  | 77                                     | 4.63  |
| Bulgaria              | 54            | 4.31  | 66                   | 4.17  | 56                                      | 3.64  | 41                                     | 5.11  |
| Panama                | 55            | 4.28  | 56                   | 4.41  | 53                                      | 3.66  | 63                                     | 4.76  |
| Uruguay               | 56            | 4.28  | 43                   | 4.76  | 67                                      | 3.32  | 64                                     | 4.75  |
| Morocco               | 57            | 4.27  | 47                   | 4.60  | 72                                      | 3.27  | 52                                     | 4.93  |
| Egypt                 | 58            | 4.24  | 50                   | 4.52  | 60                                      | 3.51  | 68                                     | 4.70  |
| Brazil                | 59            | 4.20  | 67                   | 4.14  | 48                                      | 3.76  | 67                                     | 4.70  |
| Indonesia             | 60            | 4.20  | 54                   | 4.45  | 68                                      | 3.30  | 56                                     | 4.85  |
| Serbia and Montenegro | 61            | 4.18  | 79                   | 3.99  | 80                                      | 3.09  | 13                                     | 5.47  |
| South Africa          | 62            | 4.18  | 59                   | 4.35  | 44                                      | 3.81  | 96                                     | 4.37  |
| Poland                | 63            | 4.18  | 63                   | 4.22  | 62                                      | 3.50  | 60                                     | 4.81  |
| Argentina             | 64            | 4.18  | 85                   | 3.90  | 58                                      | 3.58  | 45                                     | 5.05  |
| India                 | 65            | 4.14  | 62                   | 4.24  | 55                                      | 3.64  | 81                                     | 4.55  |
| Georgia               | 66            | 4.13  | 55                   | 4.44  | 98                                      | 2.77  | 31                                     | 5.18  |

(cont'd.)

Table 1: The Travel &amp; Tourism Competitiveness Index (cont'd.)

| Country/Economy        | SUBINDEXES    |       |                      |       |                                         |       |                                        |       |
|------------------------|---------------|-------|----------------------|-------|-----------------------------------------|-------|----------------------------------------|-------|
|                        | OVERALL INDEX |       | Regulatory framework |       | Business environment and infrastructure |       | Human, cultural, and natural resources |       |
|                        | Rank          | Score | Rank                 | Score | Rank                                    | Score | Rank                                   | Score |
| Kuwait                 | 67            | 4.08  | 71                   | 4.07  | 50                                      | 3.71  | 86                                     | 4.46  |
| Russian Federation     | 68            | 4.03  | 100                  | 3.64  | 49                                      | 3.75  | 65                                     | 4.71  |
| Guatemala              | 69            | 4.00  | 68                   | 4.14  | 76                                      | 3.16  | 69                                     | 4.69  |
| Botswana               | 70            | 3.99  | 64                   | 4.21  | 69                                      | 3.30  | 85                                     | 4.47  |
| China                  | 71            | 3.97  | 78                   | 4.00  | 61                                      | 3.51  | 93                                     | 4.39  |
| Colombia               | 72            | 3.96  | 69                   | 4.12  | 77                                      | 3.15  | 78                                     | 4.62  |
| Namibia                | 73            | 3.95  | 73                   | 4.05  | 64                                      | 3.44  | 95                                     | 4.37  |
| Armenia                | 74            | 3.93  | 65                   | 4.21  | 96                                      | 2.80  | 62                                     | 4.77  |
| Azerbaijan             | 75            | 3.92  | 77                   | 4.01  | 70                                      | 3.29  | 88                                     | 4.45  |
| Romania                | 76            | 3.91  | 87                   | 3.86  | 74                                      | 3.20  | 71                                     | 4.68  |
| El Salvador            | 77            | 3.90  | 75                   | 4.01  | 66                                      | 3.34  | 98                                     | 4.36  |
| Ukraine                | 78            | 3.89  | 76                   | 4.01  | 73                                      | 3.21  | 89                                     | 4.45  |
| Sri Lanka              | 79            | 3.89  | 70                   | 4.11  | 91                                      | 2.86  | 70                                     | 4.69  |
| Tanzania               | 80            | 3.86  | 72                   | 4.07  | 89                                      | 2.88  | 75                                     | 4.64  |
| Peru                   | 81            | 3.86  | 74                   | 4.04  | 85                                      | 2.95  | 80                                     | 4.59  |
| Kazakhstan             | 82            | 3.81  | 81                   | 3.97  | 81                                      | 3.03  | 90                                     | 4.44  |
| Macedonia, FYR         | 83            | 3.81  | 114                  | 3.34  | 82                                      | 3.01  | 44                                     | 5.07  |
| Gambia                 | 84            | 3.81  | 52                   | 4.48  | 106                                     | 2.66  | 101                                    | 4.28  |
| Trinidad and Tobago    | 85            | 3.79  | 88                   | 3.83  | 65                                      | 3.35  | 104                                    | 4.20  |
| Philippines            | 86            | 3.79  | 80                   | 3.98  | 79                                      | 3.10  | 100                                    | 4.29  |
| Vietnam                | 87            | 3.78  | 84                   | 3.91  | 95                                      | 2.81  | 76                                     | 4.63  |
| Honduras               | 88            | 3.78  | 83                   | 3.93  | 83                                      | 2.97  | 91                                     | 4.44  |
| Nicaragua              | 89            | 3.76  | 82                   | 3.97  | 99                                      | 2.76  | 82                                     | 4.54  |
| Albania                | 90            | 3.75  | 94                   | 3.70  | 114                                     | 2.49  | 43                                     | 5.07  |
| Mongolia               | 91            | 3.72  | 92                   | 3.74  | 109                                     | 2.57  | 55                                     | 4.86  |
| Mauritania             | 92            | 3.71  | 95                   | 3.68  | 97                                      | 2.80  | 74                                     | 4.67  |
| Algeria                | 93            | 3.67  | 89                   | 3.81  | 93                                      | 2.82  | 97                                     | 4.37  |
| Zambia                 | 94            | 3.66  | 86                   | 3.87  | 120                                     | 2.44  | 72                                     | 4.67  |
| Moldova                | 95            | 3.65  | 99                   | 3.65  | 100                                     | 2.75  | 83                                     | 4.54  |
| Cambodia               | 96            | 3.64  | 90                   | 3.77  | 103                                     | 2.71  | 87                                     | 4.45  |
| Ecuador                | 97            | 3.64  | 98                   | 3.66  | 90                                      | 2.87  | 94                                     | 4.38  |
| Kenya                  | 98            | 3.62  | 91                   | 3.76  | 86                                      | 2.94  | 107                                    | 4.15  |
| Venezuela              | 99            | 3.62  | 117                  | 3.32  | 78                                      | 3.12  | 92                                     | 4.41  |
| Guyana                 | 100           | 3.56  | 96                   | 3.67  | 88                                      | 2.93  | 109                                    | 4.09  |
| Uganda                 | 101           | 3.56  | 105                  | 3.54  | 119                                     | 2.44  | 66                                     | 4.70  |
| Kyrgyz Republic        | 102           | 3.54  | 111                  | 3.41  | 104                                     | 2.69  | 84                                     | 4.52  |
| Pakistan               | 103           | 3.52  | 106                  | 3.50  | 75                                      | 3.19  | 118                                    | 3.88  |
| Bosnia and Herzegovina | 104           | 3.51  | 101                  | 3.59  | 94                                      | 2.82  | 108                                    | 4.14  |
| Mali                   | 105           | 3.50  | 93                   | 3.72  | 121                                     | 2.41  | 99                                     | 4.36  |
| Nepal                  | 106           | 3.49  | 113                  | 3.39  | 117                                     | 2.47  | 79                                     | 4.60  |
| Zimbabwe               | 107           | 3.48  | 108                  | 3.49  | 84                                      | 2.97  | 114                                    | 3.99  |
| Suriname               | 108           | 3.47  | 110                  | 3.44  | 87                                      | 2.94  | 112                                    | 4.02  |
| Bolivia                | 109           | 3.46  | 109                  | 3.46  | 101                                     | 2.73  | 103                                    | 4.20  |
| Tajikistan             | 110           | 3.46  | 97                   | 3.67  | 112                                     | 2.52  | 105                                    | 4.18  |
| Paraguay               | 111           | 3.44  | 107                  | 3.50  | 92                                      | 2.84  | 113                                    | 4.00  |
| Madagascar             | 112           | 3.44  | 104                  | 3.54  | 105                                     | 2.68  | 110                                    | 4.09  |
| Burkina Faso           | 113           | 3.41  | 102                  | 3.58  | 115                                     | 2.48  | 106                                    | 4.17  |
| Malawi                 | 114           | 3.31  | 103                  | 3.57  | 118                                     | 2.46  | 117                                    | 3.90  |
| Nigeria                | 115           | 3.30  | 118                  | 3.32  | 102                                     | 2.72  | 119                                    | 3.86  |
| Benin                  | 116           | 3.28  | 112                  | 3.40  | 116                                     | 2.47  | 115                                    | 3.96  |
| Ethiopia               | 117           | 3.26  | 120                  | 3.13  | 110                                     | 2.57  | 111                                    | 4.08  |
| Cameroon               | 118           | 3.25  | 119                  | 3.16  | 122                                     | 2.37  | 102                                    | 4.22  |
| Mozambique             | 119           | 3.23  | 115                  | 3.34  | 107                                     | 2.63  | 121                                    | 3.71  |
| Bangladesh             | 120           | 3.21  | 121                  | 3.07  | 108                                     | 2.61  | 116                                    | 3.96  |
| Lesotho                | 121           | 3.12  | 116                  | 3.34  | 111                                     | 2.54  | 123                                    | 3.48  |
| Angola                 | 122           | 2.89  | 122                  | 2.91  | 113                                     | 2.50  | 124                                    | 3.25  |
| Burundi                | 123           | 2.88  | 123                  | 2.82  | 123                                     | 2.31  | 122                                    | 3.50  |
| Chad                   | 124           | 2.68  | 124                  | 2.51  | 124                                     | 1.80  | 120                                    | 3.72  |

Table 2: The Travel &amp; Tourism Competitiveness Index: Regulatory framework

| Country/Economy        | Regulatory framework |       | Policy rules and regulations |       | Environmental regulation |       | Safety and security |       | Health and hygiene |       | Prioritization of Travel & Tourism |       |
|------------------------|----------------------|-------|------------------------------|-------|--------------------------|-------|---------------------|-------|--------------------|-------|------------------------------------|-------|
|                        | Rank                 | Score | Rank                         | Score | Rank                     | Score | Rank                | Score | Rank               | Score | Rank                               | Score |
| Albania                | 94                   | 3.70  | 84                           | 4.14  | 124                      | 2.50  | 80                  | 4.09  | 58                 | 4.81  | 107                                | 2.94  |
| Algeria                | 89                   | 3.81  | 113                          | 3.37  | 82                       | 3.66  | 74                  | 4.18  | 53                 | 4.91  | 109                                | 2.92  |
| Angola                 | 122                  | 2.91  | 121                          | 2.93  | 115                      | 2.92  | 92                  | 3.85  | 119                | 2.61  | 121                                | 2.27  |
| Argentina              | 85                   | 3.90  | 78                           | 4.30  | 94                       | 3.41  | 91                  | 3.90  | 90                 | 4.04  | 64                                 | 3.85  |
| Armenia                | 65                   | 4.21  | 92                           | 3.81  | 102                      | 3.28  | 49                  | 4.79  | 40                 | 5.46  | 67                                 | 3.68  |
| Australia              | 16                   | 5.28  | 52                           | 4.81  | 13                       | 5.58  | 20                  | 5.50  | 22                 | 5.91  | 30                                 | 4.62  |
| Austria                | 3                    | 5.79  | 22                           | 5.33  | 2                        | 6.09  | 4                   | 6.20  | 14                 | 6.18  | 14                                 | 5.17  |
| Azerbaijan             | 77                   | 4.01  | 96                           | 3.76  | 104                      | 3.18  | 38                  | 4.97  | 63                 | 4.70  | 84                                 | 3.42  |
| Bahrain                | 61                   | 4.24  | 62                           | 4.71  | 77                       | 3.74  | 61                  | 4.55  | 61                 | 4.76  | 81                                 | 3.46  |
| Bangladesh             | 121                  | 3.07  | 99                           | 3.69  | 112                      | 2.96  | 119                 | 3.08  | 105                | 3.27  | 118                                | 2.37  |
| Barbados               | 31                   | 5.08  | 27                           | 5.24  | 42                       | 4.43  | 35                  | 5.13  | 42                 | 5.40  | 11                                 | 5.19  |
| Belgium                | 24                   | 5.16  | 20                           | 5.33  | 18                       | 5.44  | 36                  | 5.06  | 2                  | 6.59  | 86                                 | 3.40  |
| Benin                  | 112                  | 3.40  | 119                          | 3.22  | 76                       | 3.75  | 82                  | 4.09  | 113                | 3.12  | 110                                | 2.84  |
| Bolivia                | 109                  | 3.46  | 85                           | 4.13  | 114                      | 2.95  | 103                 | 3.56  | 98                 | 3.73  | 108                                | 2.93  |
| Bosnia and Herzegovina | 101                  | 3.59  | 83                           | 4.18  | 119                      | 2.79  | 75                  | 4.16  | 57                 | 4.85  | 123                                | 1.97  |
| Botswana               | 64                   | 4.21  | 59                           | 4.74  | 59                       | 4.11  | 55                  | 4.65  | 86                 | 4.09  | 83                                 | 3.45  |
| Brazil                 | 67                   | 4.14  | 75                           | 4.35  | 46                       | 4.38  | 90                  | 3.91  | 72                 | 4.43  | 71                                 | 3.64  |
| Bulgaria               | 66                   | 4.17  | 82                           | 4.25  | 103                      | 3.24  | 107                 | 3.46  | 27                 | 5.81  | 45                                 | 4.11  |
| Burkina Faso           | 102                  | 3.58  | 105                          | 3.65  | 57                       | 4.16  | 65                  | 4.47  | 120                | 2.59  | 103                                | 3.05  |
| Burundi                | 123                  | 2.82  | 122                          | 2.92  | 118                      | 2.85  | 108                 | 3.45  | 111                | 3.16  | 124                                | 1.75  |
| Cambodia               | 90                   | 3.77  | 93                           | 3.78  | 73                       | 3.82  | 98                  | 3.72  | 122                | 2.21  | 7                                  | 5.34  |
| Cameroon               | 119                  | 3.16  | 111                          | 3.39  | 116                      | 2.91  | 89                  | 4.01  | 110                | 3.19  | 119                                | 2.32  |
| Canada                 | 15                   | 5.31  | 16                           | 5.46  | 19                       | 5.43  | 21                  | 5.40  | 38                 | 5.66  | 32                                 | 4.60  |
| Chad                   | 124                  | 2.51  | 123                          | 2.78  | 123                      | 2.62  | 120                 | 2.98  | 123                | 1.78  | 117                                | 2.38  |
| Chile                  | 38                   | 4.83  | 7                            | 5.66  | 36                       | 4.61  | 30                  | 5.22  | 51                 | 5.03  | 73                                 | 3.61  |
| China                  | 78                   | 4.00  | 97                           | 3.76  | 88                       | 3.53  | 83                  | 4.08  | 84                 | 4.09  | 33                                 | 4.54  |
| Colombia               | 69                   | 4.12  | 41                           | 4.99  | 58                       | 4.12  | 105                 | 3.48  | 55                 | 4.88  | 98                                 | 3.14  |
| Costa Rica             | 39                   | 4.80  | 17                           | 5.40  | 35                       | 4.63  | 67                  | 4.40  | 50                 | 5.05  | 34                                 | 4.54  |
| Croatia                | 58                   | 4.37  | 72                           | 4.55  | 52                       | 4.26  | 63                  | 4.54  | 66                 | 4.59  | 57                                 | 3.89  |
| Cyprus                 | 29                   | 5.09  | 49                           | 4.87  | 53                       | 4.26  | 34                  | 5.17  | 36                 | 5.69  | 4                                  | 5.49  |
| Czech Republic         | 40                   | 4.80  | 32                           | 5.15  | 31                       | 4.82  | 52                  | 4.74  | 44                 | 5.32  | 52                                 | 3.97  |
| Denmark                | 8                    | 5.46  | 10                           | 5.56  | 1                        | 6.11  | 8                   | 6.00  | 16                 | 6.14  | 80                                 | 3.47  |
| Dominican Republic     | 51                   | 4.52  | 14                           | 5.47  | 72                       | 3.84  | 87                  | 4.05  | 79                 | 4.18  | 18                                 | 5.05  |
| Ecuador                | 98                   | 3.66  | 77                           | 4.32  | 107                      | 3.08  | 102                 | 3.56  | 80                 | 4.12  | 96                                 | 3.21  |
| Egypt                  | 50                   | 4.52  | 69                           | 4.59  | 75                       | 3.79  | 64                  | 4.54  | 69                 | 4.50  | 12                                 | 5.18  |
| El Salvador            | 75                   | 4.01  | 9                            | 5.63  | 63                       | 3.97  | 118                 | 3.10  | 73                 | 4.27  | 100                                | 3.11  |
| Estonia                | 32                   | 5.07  | 47                           | 4.92  | 32                       | 4.78  | 28                  | 5.25  | 30                 | 5.75  | 28                                 | 4.67  |
| Ethiopia               | 120                  | 3.13  | 115                          | 3.33  | 111                      | 2.98  | 58                  | 4.60  | 124                | 1.67  | 102                                | 3.10  |
| Finland                | 7                    | 5.61  | 15                           | 5.46  | 5                        | 5.98  | 1                   | 6.55  | 6                  | 6.32  | 65                                 | 3.76  |
| France                 | 13                   | 5.34  | 40                           | 5.00  | 15                       | 5.50  | 29                  | 5.22  | 9                  | 6.27  | 27                                 | 4.69  |
| Gambia                 | 52                   | 4.48  | 74                           | 4.38  | 43                       | 4.41  | 48                  | 4.80  | 95                 | 3.81  | 20                                 | 4.98  |
| Georgia                | 55                   | 4.44  | 80                           | 4.27  | 68                       | 3.89  | 47                  | 4.80  | 43                 | 5.37  | 59                                 | 3.87  |
| Germany                | 6                    | 5.62  | 6                            | 5.67  | 3                        | 6.05  | 2                   | 6.26  | 11                 | 6.23  | 56                                 | 3.90  |
| Greece                 | 20                   | 5.21  | 57                           | 4.77  | 45                       | 4.39  | 18                  | 5.53  | 3                  | 6.53  | 22                                 | 4.85  |
| Guatemala              | 68                   | 4.14  | 18                           | 5.37  | 79                       | 3.68  | 114                 | 3.17  | 76                 | 4.23  | 38                                 | 4.24  |
| Guyana                 | 96                   | 3.67  | 79                           | 4.29  | 93                       | 3.44  | 124                 | 2.39  | 87                 | 4.08  | 41                                 | 4.16  |
| Honduras               | 83                   | 3.93  | 37                           | 5.12  | 87                       | 3.54  | 113                 | 3.24  | 83                 | 4.09  | 70                                 | 3.65  |
| Hong Kong SAR          | 4                    | 5.75  | 2                            | 5.76  | 24                       | 5.11  | 6                   | 6.07  | 1                  | 6.62  | 13                                 | 5.18  |
| Hungary                | 26                   | 5.15  | 25                           | 5.26  | 33                       | 4.75  | 25                  | 5.32  | 12                 | 6.20  | 39                                 | 4.22  |
| Iceland                | 5                    | 5.69  | 36                           | 5.12  | 12                       | 5.60  | 3                   | 6.21  | 4                  | 6.42  | 16                                 | 5.10  |
| India                  | 62                   | 4.24  | 86                           | 4.12  | 41                       | 4.45  | 39                  | 4.96  | 100                | 3.59  | 48                                 | 4.06  |
| Indonesia              | 54                   | 4.45  | 43                           | 4.97  | 81                       | 3.66  | 50                  | 4.77  | 103                | 3.48  | 6                                  | 5.36  |
| Ireland                | 14                   | 5.32  | 4                            | 5.69  | 22                       | 5.18  | 31                  | 5.22  | 35                 | 5.69  | 24                                 | 4.84  |
| Israel                 | 36                   | 4.93  | 30                           | 5.18  | 30                       | 4.86  | 69                  | 4.34  | 7                  | 6.31  | 53                                 | 3.93  |
| Italy                  | 42                   | 4.77  | 70                           | 4.58  | 54                       | 4.26  | 53                  | 4.73  | 5                  | 6.41  | 60                                 | 3.86  |
| Jamaica                | 49                   | 4.54  | 3                            | 5.70  | 67                       | 3.92  | 111                 | 3.30  | 67                 | 4.59  | 10                                 | 5.22  |
| Japan                  | 28                   | 5.10  | 38                           | 5.05  | 17                       | 5.47  | 23                  | 5.37  | 28                 | 5.78  | 63                                 | 3.85  |
| Jordan                 | 30                   | 5.09  | 29                           | 5.18  | 56                       | 4.21  | 19                  | 5.53  | 41                 | 5.41  | 17                                 | 5.10  |
| Kazakhstan             | 81                   | 3.97  | 106                          | 3.54  | 80                       | 3.67  | 76                  | 4.15  | 45                 | 5.30  | 97                                 | 3.20  |
| Kenya                  | 91                   | 3.76  | 116                          | 3.33  | 60                       | 4.07  | 116                 | 3.12  | 106                | 3.26  | 19                                 | 4.99  |
| Korea, Rep.            | 46                   | 4.61  | 56                           | 4.78  | 37                       | 4.60  | 37                  | 5.00  | 60                 | 4.78  | 58                                 | 3.87  |
| Kuwait                 | 71                   | 4.07  | 100                          | 3.69  | 96                       | 3.35  | 22                  | 5.38  | 37                 | 5.67  | 120                                | 2.28  |
| Kyrgyz Republic        | 111                  | 3.41  | 120                          | 3.10  | 106                      | 3.16  | 115                 | 3.15  | 74                 | 4.27  | 89                                 | 3.37  |
| Latvia                 | 60                   | 4.32  | 71                           | 4.57  | 49                       | 4.31  | 41                  | 4.92  | 68                 | 4.56  | 94                                 | 3.22  |
| Lesotho                | 116                  | 3.34  | 87                           | 4.04  | 105                      | 3.17  | 94                  | 3.80  | 109                | 3.21  | 115                                | 2.46  |
| Lithuania              | 57                   | 4.39  | 68                           | 4.59  | 51                       | 4.29  | 57                  | 4.60  | 47                 | 5.24  | 95                                 | 3.21  |

(cont'd.)

Table 2: The Travel &amp; Tourism Competitiveness Index: Regulatory framework (cont'd.)

| Country/Economy       | Regulatory framework |       | PILLARS                      |       |                          |       |                     |       |                    |       |                                    |       |
|-----------------------|----------------------|-------|------------------------------|-------|--------------------------|-------|---------------------|-------|--------------------|-------|------------------------------------|-------|
|                       | Rank                 | Score | Policy rules and regulations |       | Environmental regulation |       | Safety and security |       | Health and hygiene |       | Prioritization of Travel & Tourism |       |
|                       | Rank                 | Score | Rank                         | Score | Rank                     | Score | Rank                | Score | Rank               | Score | Rank                               | Score |
| Luxembourg            | 17                   | 5.28  | 5                            | 5.67  | 11                       | 5.65  | 13                  | 5.70  | 19                 | 5.97  | 85                                 | 3.41  |
| Macedonia, FYR        | 114                  | 3.34  | 89                           | 3.96  | 110                      | 3.01  | 97                  | 3.75  | 96                 | 3.80  | 122                                | 2.20  |
| Madagascar            | 104                  | 3.54  | 117                          | 3.23  | 62                       | 3.98  | 93                  | 3.81  | 118                | 2.69  | 50                                 | 3.99  |
| Malawi                | 103                  | 3.57  | 73                           | 4.45  | 86                       | 3.56  | 81                  | 4.09  | 104                | 3.28  | 114                                | 2.47  |
| Malaysia              | 27                   | 5.12  | 26                           | 5.25  | 20                       | 5.31  | 26                  | 5.30  | 62                 | 4.75  | 21                                 | 4.98  |
| Mali                  | 93                   | 3.72  | 110                          | 3.45  | 69                       | 3.87  | 66                  | 4.45  | 114                | 3.12  | 66                                 | 3.71  |
| Malta                 | 23                   | 5.16  | 53                           | 4.79  | 55                       | 4.21  | 16                  | 5.62  | 26                 | 5.82  | 5                                  | 5.37  |
| Mauritania            | 95                   | 3.68  | 112                          | 3.38  | 98                       | 3.34  | 54                  | 4.71  | 115                | 3.05  | 55                                 | 3.90  |
| Mauritius             | 35                   | 4.96  | 63                           | 4.67  | 34                       | 4.67  | 40                  | 4.95  | 46                 | 5.25  | 9                                  | 5.24  |
| Mexico                | 48                   | 4.55  | 33                           | 5.13  | 47                       | 4.35  | 104                 | 3.54  | 49                 | 5.05  | 29                                 | 4.65  |
| Moldova               | 99                   | 3.65  | 118                          | 3.22  | 92                       | 3.46  | 88                  | 4.01  | 56                 | 4.87  | 113                                | 2.69  |
| Mongolia              | 92                   | 3.74  | 94                           | 3.78  | 117                      | 2.87  | 77                  | 4.13  | 75                 | 4.26  | 68                                 | 3.66  |
| Morocco               | 47                   | 4.60  | 48                           | 4.90  | 64                       | 3.97  | 43                  | 4.88  | 81                 | 4.11  | 15                                 | 5.16  |
| Mozambique            | 115                  | 3.34  | 108                          | 3.50  | 91                       | 3.48  | 100                 | 3.60  | 121                | 2.50  | 72                                 | 3.64  |
| Namibia               | 73                   | 4.05  | 44                           | 4.95  | 48                       | 4.32  | 85                  | 4.07  | 107                | 3.23  | 69                                 | 3.66  |
| Nepal                 | 113                  | 3.39  | 91                           | 3.83  | 97                       | 3.35  | 123                 | 2.73  | 116                | 3.02  | 49                                 | 4.04  |
| Netherlands           | 22                   | 5.17  | 12                           | 5.50  | 10                       | 5.69  | 27                  | 5.29  | 15                 | 6.16  | 91                                 | 3.24  |
| New Zealand           | 10                   | 5.44  | 19                           | 5.36  | 8                        | 5.85  | 12                  | 5.72  | 23                 | 5.90  | 36                                 | 4.37  |
| Nicaragua             | 82                   | 3.97  | 39                           | 5.04  | 99                       | 3.32  | 68                  | 4.36  | 97                 | 3.76  | 88                                 | 3.38  |
| Nigeria               | 118                  | 3.32  | 109                          | 3.49  | 78                       | 3.69  | 117                 | 3.10  | 108                | 3.21  | 101                                | 3.10  |
| Norway                | 9                    | 5.45  | 34                           | 5.13  | 9                        | 5.83  | 9                   | 5.96  | 10                 | 6.24  | 46                                 | 4.10  |
| Pakistan              | 106                  | 3.50  | 98                           | 3.73  | 85                       | 3.57  | 106                 | 3.46  | 91                 | 4.04  | 111                                | 2.71  |
| Panama                | 56                   | 4.41  | 31                           | 5.16  | 70                       | 3.85  | 59                  | 4.58  | 65                 | 4.63  | 62                                 | 3.85  |
| Paraguay              | 107                  | 3.50  | 95                           | 3.77  | 121                      | 2.68  | 101                 | 3.58  | 88                 | 4.08  | 87                                 | 3.39  |
| Peru                  | 74                   | 4.04  | 35                           | 5.13  | 71                       | 3.85  | 110                 | 3.38  | 93                 | 3.97  | 61                                 | 3.86  |
| Philippines           | 80                   | 3.98  | 61                           | 4.72  | 83                       | 3.65  | 96                  | 3.75  | 77                 | 4.22  | 74                                 | 3.59  |
| Poland                | 63                   | 4.22  | 66                           | 4.66  | 65                       | 3.96  | 71                  | 4.26  | 89                 | 4.07  | 42                                 | 4.15  |
| Portugal              | 11                   | 5.40  | 28                           | 5.23  | 26                       | 5.05  | 11                  | 5.82  | 17                 | 6.13  | 26                                 | 4.78  |
| Qatar                 | 34                   | 5.04  | 65                           | 4.66  | 29                       | 4.89  | 17                  | 5.61  | 24                 | 5.88  | 40                                 | 4.17  |
| Romania               | 87                   | 3.86  | 67                           | 4.61  | 101                      | 3.31  | 72                  | 4.26  | 99                 | 3.68  | 82                                 | 3.45  |
| Russian Federation    | 100                  | 3.64  | 124                          | 2.71  | 113                      | 2.96  | 99                  | 3.66  | 31                 | 5.73  | 99                                 | 3.13  |
| Serbia and Montenegro | 79                   | 3.99  | 76                           | 4.33  | 120                      | 2.72  | 62                  | 4.55  | 48                 | 5.11  | 92                                 | 3.23  |
| Singapore             | 1                    | 5.81  | 1                            | 5.78  | 6                        | 5.92  | 7                   | 6.02  | 29                 | 5.77  | 2                                  | 5.57  |
| Slovak Republic       | 37                   | 4.86  | 24                           | 5.30  | 38                       | 4.59  | 24                  | 5.37  | 18                 | 5.99  | 104                                | 3.05  |
| Slovenia              | 44                   | 4.74  | 81                           | 4.27  | 27                       | 5.01  | 33                  | 5.21  | 34                 | 5.69  | 77                                 | 3.51  |
| South Africa          | 59                   | 4.35  | 46                           | 4.94  | 28                       | 4.97  | 95                  | 3.77  | 82                 | 4.10  | 51                                 | 3.99  |
| Spain                 | 25                   | 5.15  | 45                           | 4.95  | 40                       | 4.51  | 46                  | 4.84  | 21                 | 5.93  | 3                                  | 5.54  |
| Sri Lanka             | 70                   | 4.11  | 64                           | 4.67  | 74                       | 3.80  | 112                 | 3.27  | 70                 | 4.49  | 37                                 | 4.33  |
| Suriname              | 110                  | 3.44  | 107                          | 3.54  | 122                      | 2.67  | 84                  | 4.07  | 71                 | 4.48  | 116                                | 2.43  |
| Sweden                | 19                   | 5.25  | 23                           | 5.30  | 7                        | 5.87  | 15                  | 5.64  | 13                 | 6.19  | 93                                 | 3.22  |
| Switzerland           | 2                    | 5.80  | 21                           | 5.33  | 4                        | 6.04  | 5                   | 6.08  | 8                  | 6.29  | 8                                  | 5.28  |
| Taiwan, China         | 45                   | 4.73  | 8                            | 5.65  | 21                       | 5.19  | 32                  | 5.21  | 85                 | 4.09  | 78                                 | 3.51  |
| Tajikistan            | 97                   | 3.67  | 102                          | 3.68  | 89                       | 3.52  | 78                  | 4.11  | 92                 | 4.00  | 106                                | 3.03  |
| Tanzania              | 72                   | 4.07  | 101                          | 3.68  | 44                       | 4.40  | 79                  | 4.09  | 101                | 3.55  | 31                                 | 4.61  |
| Thailand              | 41                   | 4.78  | 55                           | 4.78  | 39                       | 4.58  | 42                  | 4.91  | 59                 | 4.80  | 25                                 | 4.84  |
| Trinidad and Tobago   | 88                   | 3.83  | 60                           | 4.74  | 100                      | 3.32  | 121                 | 2.85  | 64                 | 4.68  | 75                                 | 3.57  |
| Tunisia               | 12                   | 5.34  | 42                           | 4.98  | 16                       | 5.47  | 14                  | 5.64  | 52                 | 5.02  | 1                                  | 5.59  |
| Turkey                | 53                   | 4.45  | 51                           | 4.82  | 61                       | 4.04  | 56                  | 4.61  | 54                 | 4.90  | 54                                 | 3.91  |
| Uganda                | 105                  | 3.54  | 103                          | 3.66  | 66                       | 3.94  | 109                 | 3.44  | 112                | 3.13  | 79                                 | 3.51  |
| Ukraine               | 76                   | 4.01  | 88                           | 3.99  | 109                      | 3.04  | 73                  | 4.23  | 39                 | 5.55  | 90                                 | 3.25  |
| United Arab Emirates  | 18                   | 5.28  | 54                           | 4.78  | 25                       | 5.07  | 10                  | 5.83  | 25                 | 5.84  | 23                                 | 4.85  |
| United Kingdom        | 21                   | 5.20  | 11                           | 5.54  | 14                       | 5.52  | 44                  | 4.88  | 33                 | 5.70  | 35                                 | 4.38  |
| United States         | 33                   | 5.06  | 13                           | 5.48  | 23                       | 5.15  | 45                  | 4.84  | 32                 | 5.72  | 47                                 | 4.10  |
| Uruguay               | 43                   | 4.76  | 50                           | 4.84  | 50                       | 4.30  | 60                  | 4.57  | 20                 | 5.95  | 44                                 | 4.13  |
| Venezuela             | 117                  | 3.32  | 90                           | 3.84  | 108                      | 3.06  | 122                 | 2.80  | 78                 | 4.20  | 112                                | 2.70  |
| Vietnam               | 84                   | 3.91  | 104                          | 3.66  | 84                       | 3.59  | 51                  | 4.77  | 94                 | 3.96  | 76                                 | 3.55  |
| Zambia                | 86                   | 3.87  | 58                           | 4.76  | 95                       | 3.39  | 70                  | 4.33  | 117                | 2.69  | 43                                 | 4.15  |
| Zimbabwe              | 108                  | 3.49  | 114                          | 3.36  | 90                       | 3.51  | 86                  | 4.07  | 102                | 3.48  | 105                                | 3.04  |

Table 3: The Travel &amp; Tourism Competitiveness Index: Business environment and infrastructure

| Country/Economy        | Business environment and infrastructure |       | PILLARS                      |       |                                 |       |                        |       |                    |       |                                       |       |
|------------------------|-----------------------------------------|-------|------------------------------|-------|---------------------------------|-------|------------------------|-------|--------------------|-------|---------------------------------------|-------|
|                        | Rank                                    | Score | Air transport infrastructure |       | Ground transport infrastructure |       | Tourism infrastructure |       | ICT infrastructure |       | Price competitiveness in T&T industry |       |
|                        | Rank                                    | Score | Rank                         | Score | Rank                            | Score | Rank                   | Score | Rank               | Score | Rank                                  | Score |
| Albania                | 114                                     | 2.49  | 113                          | 2.00  | 122                             | 1.94  | 86                     | 2.39  | 106                | 1.80  | 81                                    | 4.31  |
| Algeria                | 93                                      | 2.82  | 101                          | 2.25  | 78                              | 3.00  | 114                    | 1.69  | 118                | 1.63  | 9                                     | 5.52  |
| Angola                 | 113                                     | 2.50  | 98                           | 2.29  | 120                             | 2.00  | 115                    | 1.63  | 121                | 1.58  | 30                                    | 5.01  |
| Argentina              | 58                                      | 3.58  | 43                           | 3.49  | 69                              | 3.37  | 51                     | 3.51  | 55                 | 2.95  | 62                                    | 4.56  |
| Armenia                | 96                                      | 2.80  | 95                           | 2.32  | 98                              | 2.56  | 110                    | 1.86  | 84                 | 2.20  | 28                                    | 5.05  |
| Australia              | 10                                      | 5.04  | 5                            | 5.41  | 20                              | 5.18  | 14                     | 5.44  | 8                  | 5.57  | 111                                   | 3.59  |
| Austria                | 12                                      | 4.97  | 23                           | 4.10  | 17                              | 5.49  | 1                      | 6.92  | 22                 | 4.79  | 113                                   | 3.55  |
| Azerbaijan             | 70                                      | 3.29  | 77                           | 2.75  | 49                              | 3.87  | 101                    | 2.14  | 73                 | 2.39  | 17                                    | 5.30  |
| Bahrain                | 34                                      | 4.24  | 27                           | 3.95  | 39                              | 4.21  | 31                     | 4.18  | 52                 | 3.00  | 3                                     | 5.84  |
| Bangladesh             | 108                                     | 2.61  | 114                          | 1.99  | 87                              | 2.82  | 120                    | 1.29  | 112                | 1.71  | 19                                    | 5.25  |
| Barbados               | 36                                      | 4.14  | 53                           | 3.22  | 41                              | 4.14  | 42                     | 3.78  | 25                 | 4.62  | 33                                    | 4.93  |
| Belgium                | 29                                      | 4.41  | 26                           | 3.99  | 9                               | 6.05  | 33                     | 4.15  | 29                 | 4.39  | 114                                   | 3.49  |
| Benin                  | 116                                     | 2.47  | 122                          | 1.71  | 100                             | 2.47  | 97                     | 2.18  | 113                | 1.70  | 79                                    | 4.32  |
| Bolivia                | 101                                     | 2.73  | 68                           | 2.87  | 121                             | 1.96  | 98                     | 2.17  | 98                 | 1.89  | 49                                    | 4.74  |
| Bosnia and Herzegovina | 94                                      | 2.82  | 117                          | 1.88  | 114                             | 2.12  | 56                     | 3.27  | 61                 | 2.67  | 92                                    | 4.14  |
| Botswana               | 69                                      | 3.30  | 59                           | 3.13  | 66                              | 3.49  | 73                     | 2.68  | 97                 | 1.89  | 16                                    | 5.32  |
| Brazil                 | 48                                      | 3.76  | 28                           | 3.94  | 79                              | 2.96  | 28                     | 4.36  | 48                 | 3.22  | 80                                    | 4.31  |
| Bulgaria               | 56                                      | 3.64  | 76                           | 2.75  | 70                              | 3.33  | 25                     | 4.43  | 50                 | 3.05  | 59                                    | 4.63  |
| Burkina Faso           | 115                                     | 2.48  | 119                          | 1.81  | 103                             | 2.44  | 109                    | 1.87  | 110                | 1.74  | 67                                    | 4.53  |
| Burundi                | 123                                     | 2.31  | 123                          | 1.58  | 117                             | 2.10  | 111                    | 1.86  | 123                | 1.46  | 66                                    | 4.54  |
| Cambodia               | 103                                     | 2.71  | 89                           | 2.54  | 82                              | 2.93  | 122                    | 1.09  | 111                | 1.71  | 18                                    | 5.27  |
| Cameroon               | 122                                     | 2.37  | 120                          | 1.80  | 113                             | 2.19  | 89                     | 2.29  | 122                | 1.51  | 100                                   | 4.04  |
| Canada                 | 4                                       | 5.22  | 2                            | 5.68  | 13                              | 5.67  | 16                     | 5.31  | 4                  | 5.76  | 110                                   | 3.68  |
| Chad                   | 124                                     | 1.80  | 124                          | 1.54  | 124                             | 1.63  | 117                    | 1.44  | 124                | 1.32  | 123                                   | 3.08  |
| Chile                  | 42                                      | 3.87  | 41                           | 3.59  | 30                              | 4.61  | 61                     | 3.12  | 41                 | 3.54  | 69                                    | 4.52  |
| China                  | 61                                      | 3.51  | 36                           | 3.78  | 45                              | 3.99  | 113                    | 1.72  | 63                 | 2.62  | 11                                    | 5.42  |
| Colombia               | 77                                      | 3.15  | 50                           | 3.34  | 86                              | 2.83  | 79                     | 2.53  | 67                 | 2.52  | 71                                    | 4.51  |
| Costa Rica             | 52                                      | 3.66  | 44                           | 3.49  | 93                              | 2.59  | 36                     | 4.10  | 45                 | 3.32  | 42                                    | 4.83  |
| Croatia                | 40                                      | 4.06  | 80                           | 2.71  | 46                              | 3.98  | 11                     | 5.73  | 34                 | 3.79  | 96                                    | 4.09  |
| Cyprus                 | 23                                      | 4.50  | 34                           | 3.83  | 51                              | 3.84  | 5                      | 6.10  | 31                 | 4.26  | 72                                    | 4.48  |
| Czech Republic         | 37                                      | 4.13  | 48                           | 3.39  | 38                              | 4.27  | 23                     | 4.49  | 26                 | 4.49  | 101                                   | 4.03  |
| Denmark                | 16                                      | 4.76  | 17                           | 4.63  | 7                               | 6.21  | 22                     | 4.61  | 10                 | 5.44  | 124                                   | 2.90  |
| Dominican Republic     | 71                                      | 3.28  | 63                           | 3.04  | 71                              | 3.20  | 39                     | 3.90  | 79                 | 2.33  | 104                                   | 3.94  |
| Ecuador                | 90                                      | 2.87  | 82                           | 2.67  | 97                              | 2.58  | 94                     | 2.19  | 85                 | 2.15  | 45                                    | 4.76  |
| Egypt                  | 60                                      | 3.51  | 49                           | 3.35  | 58                              | 3.73  | 85                     | 2.39  | 74                 | 2.39  | 5                                     | 5.68  |
| El Salvador            | 66                                      | 3.34  | 57                           | 3.15  | 63                              | 3.54  | 78                     | 2.55  | 66                 | 2.54  | 36                                    | 4.89  |
| Estonia                | 25                                      | 4.45  | 56                           | 3.17  | 31                              | 4.48  | 21                     | 4.84  | 19                 | 4.86  | 34                                    | 4.92  |
| Ethiopia               | 110                                     | 2.57  | 94                           | 2.35  | 118                             | 2.07  | 118                    | 1.43  | 119                | 1.60  | 13                                    | 5.39  |
| Finland                | 18                                      | 4.68  | 19                           | 4.55  | 10                              | 5.88  | 29                     | 4.33  | 15                 | 5.24  | 117                                   | 3.41  |
| France                 | 5                                       | 5.10  | 4                            | 5.45  | 4                               | 6.44  | 15                     | 5.40  | 21                 | 4.83  | 118                                   | 3.35  |
| Gambia                 | 106                                     | 2.66  | 102                          | 2.21  | 80                              | 2.95  | 108                    | 1.87  | 104                | 1.82  | 73                                    | 4.48  |
| Georgia                | 98                                      | 2.77  | 106                          | 2.16  | 76                              | 3.07  | 106                    | 1.87  | 87                 | 2.09  | 58                                    | 4.65  |
| Germany                | 3                                       | 5.23  | 6                            | 5.39  | 1                               | 6.58  | 18                     | 5.28  | 13                 | 5.31  | 112                                   | 3.56  |
| Greece                 | 32                                      | 4.36  | 37                           | 3.72  | 34                              | 4.42  | 7                      | 6.02  | 38                 | 3.65  | 103                                   | 3.99  |
| Guatemala              | 76                                      | 3.16  | 55                           | 3.18  | 73                              | 3.12  | 76                     | 2.64  | 71                 | 2.46  | 74                                    | 4.41  |
| Guyana                 | 88                                      | 2.93  | 69                           | 2.83  | 92                              | 2.60  | 80                     | 2.52  | 65                 | 2.54  | 90                                    | 4.15  |
| Honduras               | 83                                      | 2.97  | 74                           | 2.77  | 75                              | 3.09  | 82                     | 2.45  | 90                 | 2.03  | 68                                    | 4.53  |
| Hong Kong SAR          | 14                                      | 4.81  | 12                           | 4.83  | 2                               | 6.46  | 70                     | 2.79  | 16                 | 4.98  | 31                                    | 4.98  |
| Hungary                | 51                                      | 3.71  | 65                           | 2.98  | 56                              | 3.74  | 34                     | 4.15  | 39                 | 3.61  | 97                                    | 4.07  |
| Iceland                | 8                                       | 5.04  | 13                           | 4.81  | 29                              | 4.61  | 10                     | 5.82  | 2                  | 6.16  | 108                                   | 3.80  |
| India                  | 55                                      | 3.64  | 33                           | 3.86  | 40                              | 4.17  | 96                     | 2.18  | 75                 | 2.38  | 6                                     | 5.61  |
| Indonesia              | 68                                      | 3.30  | 64                           | 2.98  | 89                              | 2.80  | 87                     | 2.36  | 80                 | 2.28  | 1                                     | 6.10  |
| Ireland                | 26                                      | 4.44  | 20                           | 4.33  | 50                              | 3.85  | 13                     | 5.58  | 30                 | 4.31  | 91                                    | 4.15  |
| Israel                 | 33                                      | 4.28  | 40                           | 3.59  | 24                              | 4.94  | 41                     | 3.79  | 23                 | 4.78  | 78                                    | 4.32  |
| Italy                  | 30                                      | 4.38  | 22                           | 4.20  | 55                              | 3.77  | 8                      | 6.00  | 27                 | 4.48  | 116                                   | 3.43  |
| Jamaica                | 59                                      | 3.53  | 47                           | 3.39  | 57                              | 3.74  | 64                     | 3.05  | 44                 | 3.37  | 95                                    | 4.09  |
| Japan                  | 17                                      | 4.71  | 16                           | 4.68  | 6                               | 6.32  | 43                     | 3.76  | 17                 | 4.95  | 107                                   | 3.84  |
| Jordan                 | 54                                      | 3.65  | 67                           | 2.88  | 47                              | 3.95  | 49                     | 3.56  | 72                 | 2.44  | 12                                    | 5.42  |
| Kazakhstan             | 81                                      | 3.03  | 75                           | 2.76  | 72                              | 3.19  | 100                    | 2.15  | 78                 | 2.34  | 51                                    | 4.72  |
| Kenya                  | 86                                      | 2.94  | 71                           | 2.82  | 84                              | 2.89  | 71                     | 2.75  | 93                 | 2.02  | 82                                    | 4.25  |
| Korea, Rep.            | 24                                      | 4.46  | 24                           | 4.10  | 19                              | 5.30  | 68                     | 2.88  | 3                  | 5.81  | 84                                    | 4.24  |
| Kuwait                 | 50                                      | 3.71  | 62                           | 3.06  | 43                              | 4.02  | 52                     | 3.49  | 53                 | 2.98  | 29                                    | 5.01  |
| Kyrgyz Republic        | 104                                     | 2.69  | 107                          | 2.15  | 104                             | 2.41  | 95                     | 2.19  | 99                 | 1.89  | 40                                    | 4.83  |
| Latvia                 | 41                                      | 4.00  | 54                           | 3.19  | 36                              | 4.29  | 37                     | 4.08  | 36                 | 3.73  | 55                                    | 4.68  |
| Lesotho                | 111                                     | 2.54  | 121                          | 1.75  | 115                             | 2.11  | 103                    | 1.98  | 117                | 1.67  | 24                                    | 5.17  |
| Lithuania              | 43                                      | 3.84  | 61                           | 3.07  | 32                              | 4.47  | 40                     | 3.80  | 40                 | 3.54  | 77                                    | 4.35  |

(cont'd.)



Table 3: The Travel &amp; Tourism Competitiveness Index: Business environment and infrastructure (cont'd.)

| Country/Economy       | Business environment and infrastructure |       | PILLARS                      |       |                                 |       |                        |       |                    |       |                                       |       |
|-----------------------|-----------------------------------------|-------|------------------------------|-------|---------------------------------|-------|------------------------|-------|--------------------|-------|---------------------------------------|-------|
|                       |                                         |       | Air transport infrastructure |       | Ground transport infrastructure |       | Tourism infrastructure |       | ICT infrastructure |       | Price competitiveness in T&T industry |       |
|                       | Rank                                    | Score | Rank                         | Score | Rank                            | Score | Rank                   | Score | Rank               | Score | Rank                                  | Score |
| Luxembourg            | 9                                       | 5.04  | 38                           | 3.68  | 21                              | 5.10  | 6                      | 6.05  | 6                  | 5.69  | 56                                    | 4.67  |
| Macedonia, FYR        | 82                                      | 3.01  | 108                          | 2.12  | 83                              | 2.92  | 63                     | 3.10  | 76                 | 2.38  | 64                                    | 4.55  |
| Madagascar            | 105                                     | 2.68  | 110                          | 2.03  | 106                             | 2.40  | 81                     | 2.48  | 115                | 1.68  | 43                                    | 4.82  |
| Malawi                | 118                                     | 2.46  | 118                          | 1.87  | 111                             | 2.32  | 112                    | 1.74  | 116                | 1.67  | 54                                    | 4.68  |
| Malaysia              | 27                                      | 4.44  | 31                           | 3.91  | 15                              | 5.58  | 60                     | 3.14  | 37                 | 3.69  | 2                                     | 5.89  |
| Mali                  | 121                                     | 2.41  | 116                          | 1.92  | 105                             | 2.40  | 105                    | 1.89  | 107                | 1.79  | 98                                    | 4.06  |
| Malta                 | 31                                      | 4.37  | 42                           | 3.58  | 60                              | 3.62  | 12                     | 5.60  | 11                 | 5.39  | 109                                   | 3.68  |
| Mauritania            | 97                                      | 2.80  | 111                          | 2.03  | 99                              | 2.47  | 72                     | 2.71  | 96                 | 1.90  | 38                                    | 4.88  |
| Mauritius             | 46                                      | 3.77  | 60                           | 3.12  | 53                              | 3.79  | 38                     | 3.99  | 59                 | 2.75  | 20                                    | 5.23  |
| Mexico                | 57                                      | 3.60  | 32                           | 3.87  | 62                              | 3.57  | 47                     | 3.58  | 60                 | 2.74  | 85                                    | 4.23  |
| Moldova               | 100                                     | 2.75  | 103                          | 2.19  | 110                             | 2.35  | 88                     | 2.32  | 81                 | 2.26  | 60                                    | 4.62  |
| Mongolia              | 109                                     | 2.57  | 96                           | 2.31  | 109                             | 2.35  | 116                    | 1.45  | 91                 | 2.02  | 52                                    | 4.71  |
| Morocco               | 72                                      | 3.27  | 83                           | 2.66  | 54                              | 3.78  | 62                     | 3.11  | 92                 | 2.02  | 46                                    | 4.76  |
| Mozambique            | 107                                     | 2.63  | 105                          | 2.17  | 108                             | 2.37  | 92                     | 2.20  | 120                | 1.60  | 41                                    | 4.83  |
| Namibia               | 64                                      | 3.44  | 45                           | 3.45  | 33                              | 4.46  | 83                     | 2.43  | 86                 | 2.10  | 47                                    | 4.75  |
| Nepal                 | 117                                     | 2.47  | 112                          | 2.02  | 116                             | 2.11  | 123                    | 1.08  | 105                | 1.81  | 14                                    | 5.35  |
| Netherlands           | 15                                      | 4.77  | 14                           | 4.80  | 8                               | 6.20  | 32                     | 4.16  | 12                 | 5.37  | 119                                   | 3.34  |
| New Zealand           | 20                                      | 4.57  | 15                           | 4.69  | 25                              | 4.83  | 35                     | 4.12  | 20                 | 4.85  | 75                                    | 4.37  |
| Nicaragua             | 99                                      | 2.76  | 73                           | 2.78  | 112                             | 2.24  | 77                     | 2.58  | 103                | 1.85  | 76                                    | 4.35  |
| Nigeria               | 102                                     | 2.72  | 104                          | 2.18  | 88                              | 2.80  | 107                    | 1.87  | 102                | 1.85  | 35                                    | 4.91  |
| Norway                | 21                                      | 4.56  | 18                           | 4.61  | 22                              | 5.10  | 17                     | 5.30  | 24                 | 4.70  | 121                                   | 3.10  |
| Pakistan              | 75                                      | 3.19  | 84                           | 2.64  | 52                              | 3.84  | 99                     | 2.17  | 89                 | 2.09  | 22                                    | 5.19  |
| Panama                | 53                                      | 3.66  | 39                           | 3.66  | 42                              | 4.04  | 57                     | 3.18  | 62                 | 2.63  | 44                                    | 4.79  |
| Paraguay              | 92                                      | 2.84  | 66                           | 2.89  | 119                             | 2.04  | 90                     | 2.28  | 109                | 1.76  | 21                                    | 5.22  |
| Peru                  | 85                                      | 2.95  | 88                           | 2.55  | 96                              | 2.58  | 66                     | 2.96  | 68                 | 2.49  | 89                                    | 4.15  |
| Philippines           | 79                                      | 3.10  | 72                           | 2.80  | 91                              | 2.70  | 93                     | 2.19  | 83                 | 2.22  | 7                                     | 5.59  |
| Poland                | 62                                      | 3.50  | 86                           | 2.60  | 61                              | 3.60  | 46                     | 3.61  | 43                 | 3.46  | 83                                    | 4.24  |
| Portugal              | 22                                      | 4.50  | 35                           | 3.81  | 23                              | 4.99  | 9                      | 5.89  | 33                 | 3.83  | 102                                   | 3.99  |
| Qatar                 | 39                                      | 4.10  | 29                           | 3.93  | 48                              | 3.94  | 26                     | 4.40  | 49                 | 3.12  | 25                                    | 5.12  |
| Romania               | 74                                      | 3.20  | 93                           | 2.38  | 77                              | 3.01  | 50                     | 3.55  | 56                 | 2.85  | 87                                    | 4.19  |
| Russian Federation    | 49                                      | 3.75  | 21                           | 4.23  | 65                              | 3.52  | 58                     | 3.17  | 51                 | 3.01  | 39                                    | 4.84  |
| Serbia and Montenegro | 80                                      | 3.09  | 99                           | 2.29  | 107                             | 2.38  | 54                     | 3.34  | 46                 | 3.29  | 88                                    | 4.16  |
| Singapore             | 11                                      | 5.01  | 10                           | 4.88  | 3                               | 6.45  | 44                     | 3.73  | 18                 | 4.87  | 26                                    | 5.10  |
| Slovak Republic       | 45                                      | 3.81  | 97                           | 2.30  | 44                              | 4.01  | 30                     | 4.29  | 35                 | 3.78  | 57                                    | 4.66  |
| Slovenia              | 38                                      | 4.11  | 79                           | 2.72  | 37                              | 4.28  | 20                     | 5.22  | 28                 | 4.47  | 106                                   | 3.87  |
| South Africa          | 44                                      | 3.81  | 30                           | 3.92  | 35                              | 4.34  | 48                     | 3.58  | 70                 | 2.46  | 48                                    | 4.74  |
| Spain                 | 7                                       | 5.05  | 7                            | 5.17  | 18                              | 5.42  | 2                      | 6.80  | 32                 | 3.93  | 105                                   | 3.93  |
| Sri Lanka             | 91                                      | 2.86  | 91                           | 2.48  | 74                              | 3.11  | 102                    | 2.01  | 94                 | 1.99  | 53                                    | 4.70  |
| Suriname              | 87                                      | 2.94  | 81                           | 2.71  | 102                             | 2.46  | 59                     | 3.14  | 82                 | 2.26  | 93                                    | 4.11  |
| Sweden                | 13                                      | 4.88  | 11                           | 4.87  | 12                              | 5.74  | 27                     | 4.39  | 1                  | 6.31  | 122                                   | 3.10  |
| Switzerland           | 2                                       | 5.36  | 9                            | 4.97  | 5                               | 6.36  | 4                      | 6.48  | 9                  | 5.54  | 115                                   | 3.46  |
| Taiwan, China         | 28                                      | 4.43  | 52                           | 3.22  | 14                              | 5.66  | 74                     | 2.67  | 14                 | 5.27  | 15                                    | 5.32  |
| Tajikistan            | 112                                     | 2.52  | 109                          | 2.09  | 94                              | 2.58  | 124                    | 1.01  | 101                | 1.86  | 27                                    | 5.08  |
| Tanzania              | 89                                      | 2.88  | 100                          | 2.26  | 68                              | 3.39  | 84                     | 2.40  | 108                | 1.77  | 63                                    | 4.56  |
| Thailand              | 35                                      | 4.14  | 25                           | 4.07  | 28                              | 4.67  | 53                     | 3.45  | 58                 | 2.78  | 4                                     | 5.71  |
| Trinidad and Tobago   | 65                                      | 3.35  | 46                           | 3.43  | 90                              | 2.77  | 65                     | 2.97  | 57                 | 2.85  | 50                                    | 4.72  |
| Tunisia               | 47                                      | 3.77  | 78                           | 2.74  | 27                              | 4.78  | 45                     | 3.70  | 69                 | 2.46  | 23                                    | 5.17  |
| Turkey                | 63                                      | 3.49  | 51                           | 3.34  | 59                              | 3.66  | 55                     | 3.30  | 54                 | 2.95  | 86                                    | 4.21  |
| Uganda                | 119                                     | 2.44  | 115                          | 1.98  | 101                             | 2.46  | 119                    | 1.36  | 100                | 1.86  | 65                                    | 4.55  |
| Ukraine               | 73                                      | 3.21  | 87                           | 2.56  | 67                              | 3.39  | 75                     | 2.66  | 64                 | 2.56  | 37                                    | 4.89  |
| United Arab Emirates  | 19                                      | 4.68  | 8                            | 5.05  | 26                              | 4.82  | 24                     | 4.47  | 42                 | 3.53  | 8                                     | 5.53  |
| United Kingdom        | 6                                       | 5.08  | 3                            | 5.59  | 16                              | 5.52  | 19                     | 5.23  | 5                  | 5.73  | 120                                   | 3.30  |
| United States         | 1                                       | 5.74  | 1                            | 6.75  | 11                              | 5.77  | 3                      | 6.50  | 7                  | 5.64  | 99                                    | 4.06  |
| Uruguay               | 67                                      | 3.32  | 92                           | 2.47  | 64                              | 3.54  | 69                     | 2.80  | 47                 | 3.29  | 70                                    | 4.51  |
| Venezuela             | 78                                      | 3.12  | 58                           | 3.14  | 95                              | 2.58  | 67                     | 2.90  | 77                 | 2.36  | 61                                    | 4.60  |
| Vietnam               | 95                                      | 2.81  | 90                           | 2.52  | 85                              | 2.88  | 121                    | 1.11  | 88                 | 2.09  | 10                                    | 5.47  |
| Zambia                | 120                                     | 2.44  | 85                           | 2.61  | 123                             | 1.90  | 104                    | 1.91  | 114                | 1.69  | 94                                    | 4.10  |
| Zimbabwe              | 84                                      | 2.97  | 70                           | 2.82  | 81                              | 2.94  | 91                     | 2.21  | 95                 | 1.90  | 32                                    | 4.95  |

Table 4: The Travel &amp; Tourism Competitiveness Index: Human, cultural, and natural resources

| Country/Economy        | PILLARS                                |       |                 |       |                             |       |                                |       |
|------------------------|----------------------------------------|-------|-----------------|-------|-----------------------------|-------|--------------------------------|-------|
|                        | Human, cultural, and natural resources |       | Human resources |       | National tourism perception |       | Natural and cultural resources |       |
|                        | Rank                                   | Score | Rank            | Score | Rank                        | Score | Rank                           | Score |
| Albania                | 43                                     | 5.07  | 35              | 5.37  | 10                          | 6.17  | 93                             | 3.68  |
| Algeria                | 97                                     | 4.37  | 86              | 4.82  | 114                         | 4.01  | 65                             | 4.28  |
| Angola                 | 124                                    | 3.25  | 118             | 3.09  | 121                         | 3.64  | 119                            | 3.02  |
| Argentina              | 45                                     | 5.05  | 66              | 5.08  | 52                          | 5.13  | 35                             | 4.93  |
| Armenia                | 62                                     | 4.77  | 53              | 5.23  | 53                          | 5.11  | 78                             | 3.98  |
| Australia              | 26                                     | 5.30  | 17              | 5.64  | 80                          | 4.60  | 15                             | 5.64  |
| Austria                | 1                                      | 5.86  | 23              | 5.53  | 33                          | 5.53  | 2                              | 6.52  |
| Azerbaijan             | 88                                     | 4.45  | 36              | 5.36  | 65                          | 4.82  | 116                            | 3.15  |
| Bahrain                | 54                                     | 4.86  | 79              | 4.94  | 36                          | 5.37  | 66                             | 4.27  |
| Bangladesh             | 116                                    | 3.96  | 99              | 4.30  | 119                         | 3.88  | 92                             | 3.69  |
| Barbados               | 17                                     | 5.38  | 42              | 5.32  | 2                           | 6.56  | 68                             | 4.25  |
| Belgium                | 4                                      | 5.62  | 27              | 5.49  | 59                          | 4.99  | 4                              | 6.38  |
| Benin                  | 115                                    | 3.96  | 104             | 4.08  | 79                          | 4.61  | 112                            | 3.19  |
| Bolivia                | 103                                    | 4.20  | 91              | 4.79  | 113                         | 4.02  | 90                             | 3.80  |
| Bosnia and Herzegovina | 108                                    | 4.14  | 90              | 4.79  | 111                         | 4.10  | 100                            | 3.52  |
| Botswana               | 85                                     | 4.47  | 113             | 3.52  | 28                          | 5.59  | 62                             | 4.30  |
| Brazil                 | 67                                     | 4.70  | 83              | 4.85  | 87                          | 4.54  | 42                             | 4.71  |
| Bulgaria               | 41                                     | 5.11  | 67              | 5.08  | 30                          | 5.56  | 43                             | 4.70  |
| Burkina Faso           | 106                                    | 4.17  | 117             | 3.18  | 12                          | 6.15  | 114                            | 3.18  |
| Burundi                | 122                                    | 3.50  | 119             | 3.08  | 98                          | 4.42  | 120                            | 2.99  |
| Cambodia               | 87                                     | 4.45  | 105             | 4.08  | 32                          | 5.53  | 91                             | 3.75  |
| Cameroon               | 102                                    | 4.22  | 103             | 4.16  | 24                          | 5.67  | 123                            | 2.83  |
| Canada                 | 16                                     | 5.40  | 12              | 5.69  | 76                          | 4.66  | 11                             | 5.86  |
| Chad                   | 120                                    | 3.72  | 120             | 2.99  | 37                          | 5.34  | 122                            | 2.83  |
| Chile                  | 47                                     | 5.03  | 24              | 5.52  | 92                          | 4.44  | 32                             | 5.13  |
| China                  | 93                                     | 4.39  | 74              | 5.00  | 120                         | 3.82  | 60                             | 4.36  |
| Colombia               | 78                                     | 4.62  | 58              | 5.18  | 89                          | 4.53  | 72                             | 4.16  |
| Costa Rica             | 20                                     | 5.34  | 28              | 5.49  | 39                          | 5.30  | 28                             | 5.22  |
| Croatia                | 11                                     | 5.55  | 54              | 5.22  | 4                           | 6.52  | 36                             | 4.90  |
| Cyprus                 | 3                                      | 5.62  | 49              | 5.24  | 5                           | 6.48  | 31                             | 5.15  |
| Czech Republic         | 22                                     | 5.32  | 26              | 5.50  | 77                          | 4.65  | 12                             | 5.80  |
| Denmark                | 9                                      | 5.59  | 4               | 6.08  | 69                          | 4.72  | 7                              | 5.97  |
| Dominican Republic     | 29                                     | 5.24  | 57              | 5.18  | 21                          | 5.88  | 45                             | 4.65  |
| Ecuador                | 94                                     | 4.38  | 96              | 4.51  | 86                          | 4.55  | 74                             | 4.10  |
| Egypt                  | 68                                     | 4.70  | 69              | 5.06  | 85                          | 4.55  | 55                             | 4.49  |
| El Salvador            | 98                                     | 4.36  | 41              | 5.32  | 102                         | 4.36  | 103                            | 3.41  |
| Estonia                | 34                                     | 5.18  | 30              | 5.45  | 31                          | 5.54  | 49                             | 4.54  |
| Ethiopia               | 111                                    | 4.08  | 112             | 3.55  | 101                         | 4.36  | 61                             | 4.32  |
| Finland                | 33                                     | 5.18  | 8               | 5.87  | 109                         | 4.15  | 18                             | 5.52  |
| France                 | 28                                     | 5.27  | 32              | 5.42  | 96                          | 4.42  | 9                              | 5.95  |
| Gambia                 | 101                                    | 4.28  | 107             | 3.96  | 25                          | 5.65  | 108                            | 3.25  |
| Georgia                | 31                                     | 5.18  | 33              | 5.40  | 7                           | 6.26  | 81                             | 3.89  |
| Germany                | 6                                      | 5.61  | 25              | 5.52  | 88                          | 4.54  | 1                              | 6.75  |
| Greece                 | 15                                     | 5.41  | 55              | 5.21  | 23                          | 5.71  | 23                             | 5.29  |
| Guatemala              | 69                                     | 4.69  | 78              | 4.95  | 74                          | 4.67  | 56                             | 4.46  |
| Guyana                 | 109                                    | 4.09  | 95              | 4.62  | 68                          | 4.73  | 121                            | 2.91  |
| Honduras               | 91                                     | 4.44  | 82              | 4.86  | 63                          | 4.83  | 97                             | 3.62  |
| Hong Kong SAR          | 14                                     | 5.44  | 7               | 5.93  | 27                          | 5.60  | 39                             | 4.78  |
| Hungary                | 51                                     | 4.98  | 37              | 5.34  | 100                         | 4.39  | 30                             | 5.20  |
| Iceland                | 5                                      | 5.61  | 3               | 6.19  | 49                          | 5.19  | 22                             | 5.44  |
| India                  | 81                                     | 4.55  | 85              | 4.83  | 81                          | 4.60  | 70                             | 4.22  |
| Indonesia              | 56                                     | 4.85  | 62              | 5.14  | 57                          | 5.00  | 58                             | 4.40  |
| Ireland                | 46                                     | 5.03  | 9               | 5.83  | 67                          | 4.77  | 54                             | 4.49  |
| Israel                 | 35                                     | 5.18  | 13              | 5.69  | 78                          | 4.61  | 27                             | 5.23  |
| Italy                  | 32                                     | 5.18  | 46              | 5.26  | 66                          | 4.79  | 20                             | 5.50  |
| Jamaica                | 36                                     | 5.17  | 39              | 5.33  | 15                          | 6.10  | 76                             | 4.08  |
| Japan                  | 38                                     | 5.15  | 11              | 5.75  | 116                         | 3.97  | 14                             | 5.73  |
| Jordan                 | 58                                     | 4.82  | 63              | 5.13  | 34                          | 5.51  | 86                             | 3.83  |
| Kazakhstan             | 90                                     | 4.44  | 60              | 5.17  | 58                          | 5.00  | 117                            | 3.15  |
| Kenya                  | 107                                    | 4.15  | 100             | 4.20  | 75                          | 4.67  | 98                             | 3.59  |
| Korea, Rep.            | 73                                     | 4.67  | 48              | 5.24  | 118                         | 3.88  | 37                             | 4.89  |
| Kuwait                 | 86                                     | 4.46  | 16              | 5.64  | 117                         | 3.94  | 89                             | 3.80  |
| Kyrgyz Republic        | 84                                     | 4.52  | 71              | 5.05  | 72                          | 4.69  | 88                             | 3.82  |
| Latvia                 | 77                                     | 4.63  | 38              | 5.33  | 107                         | 4.29  | 67                             | 4.27  |
| Lesotho                | 123                                    | 3.48  | 116             | 3.37  | 103                         | 4.34  | 124                            | 2.72  |
| Lithuania              | 61                                     | 4.79  | 61              | 5.15  | 93                          | 4.44  | 38                             | 4.80  |

(cont'd.)

Table 4: The Travel &amp; Tourism Competitiveness Index: Human, cultural, and natural resources (cont'd.)

| Country/Economy       | PILLARS                                |       |                 |       |                             |       |                                |       |
|-----------------------|----------------------------------------|-------|-----------------|-------|-----------------------------|-------|--------------------------------|-------|
|                       | Human, cultural, and natural resources |       | Human resources |       | National tourism perception |       | Natural and cultural resources |       |
|                       | Rank                                   | Score | Rank            | Score | Rank                        | Score | Rank                           | Score |
| Luxembourg            | 8                                      | 5.60  | 14              | 5.69  | 22                          | 5.84  | 24                             | 5.29  |
| Macedonia, FYR        | 44                                     | 5.07  | 56              | 5.21  | 13                          | 6.11  | 82                             | 3.89  |
| Madagascar            | 110                                    | 4.09  | 108             | 3.93  | 73                          | 4.68  | 94                             | 3.66  |
| Malawi                | 117                                    | 3.90  | 121             | 2.84  | 40                          | 5.29  | 99                             | 3.56  |
| Malaysia              | 57                                     | 4.84  | 34              | 5.38  | 26                          | 5.64  | 101                            | 3.52  |
| Mali                  | 99                                     | 4.36  | 114             | 3.49  | 8                           | 6.21  | 104                            | 3.37  |
| Malta                 | 21                                     | 5.33  | 43              | 5.32  | 16                          | 6.03  | 44                             | 4.66  |
| Mauritania            | 74                                     | 4.67  | 101             | 4.19  | 1                           | 6.58  | 110                            | 3.23  |
| Mauritius             | 39                                     | 5.15  | 89              | 4.80  | 14                          | 6.10  | 50                             | 4.54  |
| Mexico                | 50                                     | 4.98  | 50              | 5.24  | 91                          | 4.50  | 29                             | 5.22  |
| Moldova               | 83                                     | 4.54  | 80              | 4.94  | 48                          | 5.19  | 102                            | 3.49  |
| Mongolia              | 55                                     | 4.86  | 68              | 5.07  | 11                          | 6.16  | 105                            | 3.34  |
| Morocco               | 52                                     | 4.93  | 72              | 5.04  | 45                          | 5.24  | 52                             | 4.50  |
| Mozambique            | 121                                    | 3.71  | 124             | 2.54  | 44                          | 5.27  | 106                            | 3.32  |
| Namibia               | 95                                     | 4.37  | 122             | 2.83  | 9                           | 6.17  | 73                             | 4.12  |
| Nepal                 | 79                                     | 4.60  | 106             | 4.05  | 20                          | 5.91  | 85                             | 3.83  |
| Netherlands           | 25                                     | 5.30  | 21              | 5.55  | 82                          | 4.60  | 13                             | 5.74  |
| New Zealand           | 7                                      | 5.60  | 20              | 5.60  | 38                          | 5.34  | 10                             | 5.88  |
| Nicaragua             | 82                                     | 4.54  | 59              | 5.18  | 84                          | 4.58  | 83                             | 3.87  |
| Nigeria               | 119                                    | 3.86  | 102             | 4.18  | 110                         | 4.13  | 107                            | 3.25  |
| Norway                | 40                                     | 5.12  | 18              | 5.62  | 108                         | 4.26  | 21                             | 5.46  |
| Pakistan              | 118                                    | 3.88  | 98              | 4.45  | 123                         | 3.57  | 96                             | 3.62  |
| Panama                | 63                                     | 4.76  | 88              | 4.81  | 61                          | 4.92  | 48                             | 4.56  |
| Paraguay              | 113                                    | 4.00  | 92              | 4.79  | 115                         | 3.97  | 109                            | 3.24  |
| Peru                  | 80                                     | 4.59  | 77              | 4.95  | 105                         | 4.32  | 53                             | 4.49  |
| Philippines           | 100                                    | 4.29  | 93              | 4.64  | 83                          | 4.58  | 95                             | 3.66  |
| Poland                | 60                                     | 4.81  | 44              | 5.31  | 122                         | 3.59  | 19                             | 5.52  |
| Portugal              | 30                                     | 5.23  | 40              | 5.32  | 54                          | 5.10  | 25                             | 5.28  |
| Qatar                 | 49                                     | 4.99  | 19              | 5.60  | 41                          | 5.28  | 75                             | 4.08  |
| Romania               | 71                                     | 4.68  | 76              | 4.96  | 95                          | 4.43  | 46                             | 4.64  |
| Russian Federation    | 65                                     | 4.71  | 70              | 5.05  | 104                         | 4.34  | 41                             | 4.74  |
| Serbia and Montenegro | 13                                     | 5.47  | 47              | 5.25  | 19                          | 5.92  | 26                             | 5.25  |
| Singapore             | 42                                     | 5.11  | 2               | 6.21  | 47                          | 5.20  | 79                             | 3.94  |
| Slovak Republic       | 18                                     | 5.37  | 10              | 5.78  | 71                          | 4.71  | 16                             | 5.62  |
| Slovenia              | 53                                     | 4.88  | 52              | 5.23  | 60                          | 4.99  | 57                             | 4.43  |
| South Africa          | 96                                     | 4.37  | 111             | 3.64  | 56                          | 5.08  | 59                             | 4.40  |
| Spain                 | 19                                     | 5.34  | 45              | 5.30  | 55                          | 5.09  | 17                             | 5.62  |
| Sri Lanka             | 70                                     | 4.69  | 84              | 4.84  | 70                          | 4.71  | 51                             | 4.51  |
| Suriname              | 112                                    | 4.02  | 97              | 4.48  | 97                          | 4.42  | 115                            | 3.17  |
| Sweden                | 27                                     | 5.27  | 31              | 5.43  | 99                          | 4.42  | 8                              | 5.96  |
| Switzerland           | 2                                      | 5.81  | 1               | 6.25  | 62                          | 4.88  | 6                              | 6.30  |
| Taiwan, China         | 23                                     | 5.32  | 15              | 5.69  | 17                          | 5.97  | 63                             | 4.29  |
| Tajikistan            | 105                                    | 4.18  | 87              | 4.82  | 90                          | 4.51  | 113                            | 3.19  |
| Tanzania              | 75                                     | 4.64  | 110             | 3.69  | 42                          | 5.28  | 34                             | 4.96  |
| Thailand              | 59                                     | 4.82  | 75              | 4.97  | 35                          | 5.43  | 77                             | 4.05  |
| Trinidad and Tobago   | 104                                    | 4.20  | 64              | 5.10  | 106                         | 4.30  | 111                            | 3.21  |
| Tunisia               | 37                                     | 5.15  | 22              | 5.54  | 50                          | 5.17  | 40                             | 4.75  |
| Turkey                | 48                                     | 5.00  | 65              | 5.09  | 43                          | 5.28  | 47                             | 4.63  |
| Uganda                | 66                                     | 4.70  | 109             | 3.88  | 18                          | 5.94  | 64                             | 4.29  |
| Ukraine               | 89                                     | 4.45  | 73              | 5.00  | 46                          | 5.21  | 118                            | 3.12  |
| United Arab Emirates  | 24                                     | 5.31  | 29              | 5.47  | 3                           | 6.53  | 80                             | 3.92  |
| United Kingdom        | 10                                     | 5.58  | 6               | 5.97  | 94                          | 4.43  | 5                              | 6.32  |
| United States         | 12                                     | 5.50  | 5               | 5.99  | 112                         | 4.09  | 3                              | 6.42  |
| Uruguay               | 64                                     | 4.75  | 51              | 5.23  | 64                          | 4.83  | 71                             | 4.20  |
| Venezuela             | 92                                     | 4.41  | 94              | 4.63  | 124                         | 3.52  | 33                             | 5.08  |
| Vietnam               | 76                                     | 4.63  | 81              | 4.92  | 51                          | 5.14  | 84                             | 3.84  |
| Zambia                | 72                                     | 4.67  | 115             | 3.40  | 6                           | 6.39  | 69                             | 4.23  |
| Zimbabwe              | 114                                    | 3.99  | 123             | 2.60  | 29                          | 5.56  | 87                             | 3.82  |

is strongly assessed for its cultural aspects. Other areas of strength are the health and hygiene of the country (5th) and its very good tourism infrastructure (8th). However, Italy's T&T competitiveness suffers from several weaknesses, which bring the overall rating down. These weaknesses include policy rules and regulations, where it ranks a dismal 70th—below most European countries because of its very strong foreign ownership restrictions (ranked 103rd) and rules governing foreign direct investment (101st). There are also safety and security concerns (53rd). Ground transport infrastructure also gets poor marks, particularly the quality of railroads (49th) and ports (77th). Also the T&T sector is not assessed as being an important priority for the government (ranked a low 92nd).

Among countries that recently joined the European Union, **Cyprus** is ranked highest, at 20th overall, just behind the Netherlands. The country's tourism infrastructure is ranked 5th overall, with top marks for the availability of hotel rooms and major car rental companies, as well as good access to ATMs. Its tourism perception also gets top marks, ranked 5th overall, with Cypriots being extremely open to foreign visitors, for example. It is also notable that Cyprus is ranked 4th overall with regard to the prioritization of T&T, behind only Spain among European countries. However, more could be done in the policy environment, where the country is ranked 49th overall, behind many other European countries, and in upgrading human resources in order to ensure more and better-qualified people for the industry.

Elsewhere in Europe, **Turkey** is ranked a relatively low 55th overall. Although the country has a rich cultural heritage (with nine World Heritage sites), its overall T&T competitiveness is held back by onerous policy rules and regulations (ranked 51st), such as foreign ownership restrictions and rules on foreign direct investment. There are also worries about safety and security (61st, particularly related to terrorism), health and hygiene (54th), and infrastructure inadequacies. These weaknesses might be tackled more readily if the sector were further prioritized by the government (73rd).

**Russia** is ranked 68th overall. The country gets relatively high marks for natural and cultural resources, particularly because of the high number of World Heritage sites (23). It also has a quite well developed air transport infrastructure (21st). However, ground transport infrastructure (65th) and tourism infrastructure (58th) get lower marks, with a very low concentration of hotel rooms and relatively few ATMs available. Safety and security issues are also of serious concern (99th), with a high level of crime and violence and a lack of trust in the police to protect from crime. Most strikingly, with regard to the policy environment, Russia is assessed as having the worst policy environment of all countries covered (124th), due, for example, to extremely high foreign ownership restrictions, property rights that are

not well protected, and visa requirements for visitors from many countries. Environmental regulation, ranked 113th, is also a serious weakness. More generally, the sector is not seen to be a priority of the government, ranked a low 120th overall. Much needs to be achieved in the country in order to fully exploit its T&T potential.

### Asia and Oceania

Within Asia, **Hong Kong** is the economy with the strongest T&T competitiveness (ranked 6th overall), followed closely by **Singapore** (8th). These economies have excellent infrastructures: both their ground transport infrastructures are assessed as among the top three in the world, and their air transport infrastructures get high marks as well. They also have top-notch human resources, with healthy and well-educated people to work in the sector. With regard to the policy environment, they hold the top two places out of all economies, with regulatory environments that are extremely conducive to the development of the T&T industry (policies facilitating foreign ownership and foreign direct investment, well-protected property rights, and few visa restrictions). Further, they are among the safest countries of all assessed in terms of crime and security issues. Hong Kong is unsurpassed in the quality of health and hygiene, and Singapore is ranked second in the overall prioritization of Travel & Tourism.

**Australia** is ranked 13th overall, just ahead of **New Zealand** (14th). Both countries are characterized by excellent natural and cultural resources, with much nationally protected land area and, in the case of Australia, many World Heritage sites as well (there are 16 such sites in Australia, placing the country 12th). And, given the importance of the natural environment for much of their leisure tourism, it is notable that they also have comparatively stringent environmental regulations, which are aimed at ensuring that this remains a sustainable strength (both countries' governments get good marks for making efforts to ensure that the T&T industry is developed sustainably). Given their distance from other continents, particularly Australia, and the importance of domestic air travel to overcome the large distances between major sites, their competitiveness is also buttressed by excellent air transport infrastructure (especially Australia, ranked 5th), as well as good ground transport and general tourism infrastructure. Further, both countries are characterized by a relatively strong prioritization of the T&T sector and by effective destination-marketing campaigns.

**Japan** is ranked 25th, quite a bit lower than its overall economic competitiveness ranking (Japan is ranked 7th in the World Economic Forum's Global Competitiveness Index), inferring that the country's many strengths are not fully translating into an attractive environment for the development of Travel & Tourism. Although Japan gets quite good marks for its cultural resources (ranked 15th for its 14 World Heritage sites),

it does very poorly on the national tourism perception pillar (116th), because, for example, of a negative attitude toward foreign travelers in the country. Further, the sector is not perceived to be a priority for the government (ranked 98th).

**Taiwan** is ranked 30th, just ahead of Malaysia, which is ranked 31st. Taiwan's strengths lie in the quality of its human resources (ranked 15th), good ground transport and ICT infrastructure (both ranked 14th), a policy environment that is conducive to developing the sector (8th), and strong price competitiveness (ranked 15th), indicating that much of the underlying structure and environment exists for developing the sector. But its overall T&T competitiveness is held back by a relatively underdeveloped tourism infrastructure (ranked a low 74th) and the lack of prioritization of the sector by the government (ranked 78th).

**Malaysia** also has good ground transport infrastructure and excellent price competitiveness—it is ranked 2nd overall on this indicator, with very low ticket taxes and airport charges, low comparative fuel prices, and a favorable tax regime. The country is perceived as quite safe (24th), although health and hygiene indicators lag behind those of many other countries in the region, with in particular a low physician density (placing the country 86th). The country's policy environment is measured as relatively conducive to the development of the sector (ranked 26th), and the government is prioritizing Travel & Tourism, with one of the highest T&T fair attendances in the world (ranked 2nd) and an excellent evaluation for its destination-marketing campaigns (ranked 6th).

**Thailand** is ranked 43rd in the TTCI, just behind Korea (ranked 42nd). Thailand does reasonably well in national tourism perception, where it is ranked 35th, because of a very friendly attitude toward tourists (ranked 6th) and general openness toward tourism in the country. And the sector is indeed prioritized by the government (ranked 14th) with (as in Malaysia) excellent destination-marketing campaigns and an effort to ensure national presence at major T&T fairs internationally. However, important weaknesses remain, particularly in the quality of transport and tourism infrastructure, both of which remain underdeveloped. And despite its prioritization by the government, some aspects of the regulatory environment—such as stringent foreign ownership restrictions and rules governing foreign direct investment—are not particularly conducive to developing the sector (ranked 55th).

**Indonesia** is ranked quite a bit lower, at 60th overall. The country does have a great number of nationally protected areas and World Heritage sites, making it an attractive place to visit for a number of reasons. Further, Indonesia is ranked first overall in price competitiveness in the T&T industry because of low ticket taxes and airport charges, favorable fuel prices, and overall relatively low prices in the country. However, these strengths are held back by weaknesses such as underdeveloped

infrastructure in the country, including air transport (64th), ground transport (89th), and tourism infrastructure (87th). There are also some concerns related to safety and security, particularly the reliability of police services to protect from crime.

**India** is ranked 65th overall. The country has some clear strengths, which are mainly linked to cultural endowments. It ranked a very high 7th overall with regard to the number of World Heritage sites in the country, and it also benefits from a relatively welcoming attitude toward foreign travelers. The country also benefits from excellent price competitiveness—it is ranked 6th overall, with very low ticket taxes and airport charges (ranked 7th) and low prices in the economy as a whole (ranked 11th). And with regard to the policy environment, property rights are indeed well protected and foreign ownership is authorized, although the stringency of visa requirements places India a very low 106th overall. India also has quite a good air transport network (ranked 33rd), particularly given the country's stage of development. But the tourism infrastructure remains underdeveloped (ranked a very low 96th), with very few hotel rooms available by international comparison (ranked 113th) and low ATM penetration. Further, despite government and industry efforts to promote the country abroad (India is ranked 4th with regard to tourism fair attendance) and the exposure given to recent promotional campaigns, the assessment of marketing and branding to attract tourists remains somewhat mediocre (ranked 59th).

**China** is ranked 71st in the TTCI. Although China is ranked 3rd in terms of World Heritage sites and 11th in terms of price competitiveness, there are many weaknesses pulling the country's ranking down. China has a policy environment that is not at all conducive for T&T development (ranked a low 97th, just ahead of Pakistan), with property rights that are not sufficiently protected, strong foreign ownership restrictions, and stringent visa requirements. Environmental regulation also gets low marks (88th), with the government not seen to be prioritizing the development of the sector in a sustainable way. China has a relatively good air transport infrastructure (ranked 36th), and ground infrastructure that is ranked 45th overall. However, tourism infrastructure remains highly underdeveloped (ranked 113th), with very few major international car rental companies operating in the country, few hotel rooms given the size of the country, and few ATMs. There are also some safety and security concerns (83rd), as well as issues related to health and hygiene (84th), with a low physician density and access to improved sanitation and drinking water that is low by international standards. However, on a positive note, China does seem to be prioritizing the sector to a certain extent (33rd), with active participation in most international tourism fairs.

## Latin America and the Caribbean

**Barbados**, at 29th, is the highest-ranked country in the Latin America and the Caribbean region. Barbados is ranked 2nd overall in national tourism perception, with a positive attitude toward tourists and toward the value of tourism in the country. The government is prioritizing the sector to a very high degree (ranked 2nd), spending a high percentage of GDP on the sector and ensuring quality destination-marketing campaigns. Further, the country has a regulatory environment that is quite conducive to the development of the sector, with low visa requirements and very open bilateral Air Service Agreements.

**Costa Rica**, ranked 41st, is second in the region. The country's strengths are in the area of natural resources, where it is ranked 12th with regard to the percentage of nationally protected areas. Its policy environment is extremely conducive to the development of the sector (ranked 17th), with very open bilateral Air Service Agreements, low visa requirements, and an environment that welcomes foreign investment. However, safety and security remains a concern (67th). And although tourism infrastructure is quite well developed (36), with an excellent presence of major car rental companies and a high hotel room concentration in the country, ground transport infrastructure remains highly underdeveloped (93rd), particularly roads and ports, making travel in the country somewhat difficult.

**Chile** is ranked 45th. The country has an excellent policy environment (7th), with well-protected property rights, few foreign ownership restrictions, and a conducive visa regime. The country also benefits from a high level of safety and security by regional standards (30th), with low crime and reliable police services. Chile also has a relatively well developed ground transport infrastructure (30th), with quality roads and ports, although tourism infrastructure is less developed (61st), in particular hotel rooms and car rental possibilities. Further, the government is not seen as prioritizing the sector (ranked 93rd).

**Jamaica** is ranked 48th overall, followed by Mexico, in 49th place. Jamaica's government is assessed as prioritizing the sector significantly (ranked 15th), spending a large percentage of the government budget on the sector (almost 17 percent, ranked 2nd) and ensuring effective destination-marketing campaigns. In this context, it is perhaps not surprising that Jamaica gets good marks for its policy environment, ranked 3rd—just after Singapore and Hong Kong—with low visa requirements, very open bilateral Air Service Agreements, and low foreign ownership restrictions. Air transport infrastructure is also quite developed given the country's stage of development, and although the country has quite a few hotel rooms, other aspects of tourism infrastructure—such as the availability of ATMs and the presence of major car rental companies—are weaker. Health and hygiene issues are also an area of concern (ranked 67th), with a

very low physician density in the country. Of even greater concern is the safety and security situation in Jamaica, ranked a very low 111th overall, just behind Uganda and Peru, with high levels of crime and violence and a police force that is not relied upon to protect from crime. Clearly the safety issue is hindering its overall T&T competitiveness.

**Mexico**, in 49th place, gets quite high marks for its natural and cultural resources (ranked 29th) with nationally protected areas and a large number of World Heritage sites (ranking the country 7th). This “natural attractiveness” is reinforced by a relatively good policy environment for the development of Travel & Tourism, ranked 33rd overall with low visa requirements and low foreign ownership restrictions, for example. Mexico also has a relatively well developed air transport infrastructure (32nd), although its tourism infrastructure (47th) and ground transport (62nd) get lower marks. And it has some weaknesses that are eroding at its price competitiveness, ranked a low 85th, in particular very high ticket taxes and airport charges (ranked a very low 114th overall). Safety and security is also a major concern for the country, where it is ranked a very low 104—just after Bolivia and before Colombia—with high levels of crime and violence and, as in Jamaica, a police force that cannot be relied on to protect from crime.

**Brazil** is ranked 59th overall. The country clearly benefits from some excellent cultural and natural resources, in particular many World Heritage sites. And the air transport network gets relatively high marks (28th), as well as measures of the dedicated tourism infrastructure (also 28th) such as the presence of major car rental companies. However, the general ground transport network remains underdeveloped with the quality of roads, ports and railroads ranked 96th, 88th, and 81st respectively. Safety and security also continues to be of serious concern, ranked 90th overall, as it is for a number of countries in the region. The country also suffers greatly from a lack of price competitiveness (80th), attributable in part to high ticket taxes and airport charges in the country. More generally, the overall policy environment is not particularly conducive to the development of the sector (ranked 75th), with, for example, highly stringent visa requirements (ranked 89th) and foreign ownership restrictions.

**Argentina** is ranked a bit lower than Brazil, in 64th place. Argentina gets relatively good marks for its cultural and natural resources (ranked 35th), with eight World Heritage sites. The country's air transport network also receives a moderately good evaluation, with a high airport density and several operating airlines, although the quality of air transport is highlighted as a problem area (ranked 84th). Some aspects of the quality of human resources are also strengths, such as the high primary and secondary school enrollment rates. However, a number of weaknesses are pulling the country's overall score down. For example, several government policies—such as weak



property rights (ranked 121st) and stringent rules on foreign direct investment (ranked 111th)—are not supporting the development of the sector. Further, environmental regulation is not sufficiently stringent (ranked 87th) nor sufficiently clear and stable (ranked 110th), and, in relative terms, the government is not seen to be developing the concept of sustainable tourism actively (ranked 91st).

Despite its very good natural resources, **Venezuela** is ranked much lower than most other countries in the region at 99th overall. Among the significant weaknesses in the country are a lack of safety and security (ranked 122nd) and the state of infrastructure, particularly ground transport infrastructure (ranked a low 95th). The policy environment is also not very conducive to the development of the T&T sector. Although visa requirements are not particularly onerous, property rights are not well protected in the country (ranked 123rd) and foreign direct investment is also not encouraged (ranked 120th). More generally, the Venezuelan government has not pursued an international program to promote and support the T&T sector (ranked 124th), as several other Latin American countries have.

### Middle East and North Africa

Among countries in the Middle East and North Africa region, the **United Arab Emirates (UAE)** ranks highest, at 18th, well ahead of the second-ranked country, Israel at 32nd place. Although UAE ranks quite low with regard to natural and cultural resources (80th), it makes up for this with a number of strengths in other areas captured by the Index. For example, national tourism perception is rated 3rd in the world, with an extremely positive attitude toward foreign travelers and the attractiveness of the country for tourism. UAE is also seen as extremely safe from crime and violence (ranked 10th). The country also perhaps surprisingly does very well in terms of price competitiveness, ranked 8th in this area, despite a very high price level. This is because of its very low ticket taxes and airport charges, low taxation more generally, and comparatively low fuel price levels. UAE's infrastructure also gets good marks—particularly its air transport infrastructure, ranked a very high 8th out of all countries assessed. The government is seen as prioritizing the sector strongly (ranked 4th), carrying out very effective destination-marketing campaigns (ranked 1st) and ensuring the presence of the country at major T&T fairs internationally. On the other hand, the policy rules and regulations could be adapted to better support the sector's development; this is ranked 54th overall because of foreign ownership restrictions and relatively stringent visa requirements, for example.

**Israel**, ranked 32nd, is quite strong with regard to natural and cultural resources, with a large percentage of land that is nationally protected, and with five World Heritage sites. The country also has excellent human resources (13th), providing healthy and well-trained

people to work in the T&T sector. Further, its infrastructure is quite well developed compared with that of other countries in the region, although some improvements could be made in the areas of air transport (40th) and tourism infrastructure (41st)—by increasing the number of ATMs and hotel rooms, for example. Israel's regulatory environment, ranked 30th, is somewhat conducive to the development of the sector, with very well protected property rights and low foreign ownership restrictions. And the country's environmental regulation also gets relatively good marks, with the government seen as prioritizing the development of the T&T sector in a sustainable way (27th). But while Israel gets excellent marks related to health and hygiene (ranked 7th) with one of the highest physician densities in the world, it is not surprising that safety and security continues to be a major concern, placing the country a low 69th out of 124 countries, primarily related to concerns about terrorism (ranked 120th).

**Tunisia** is ranked very close to Israel, at 34th place. Tunisia is the number 1 country within the prioritization of Travel & Tourism pillar, just ahead of Singapore and Spain, with high government spending on the sector, effective destination-marketing campaigns, and attendance at most major international tourism fairs. Further, unlike some other countries in the region, Tunisia is perceived as extremely safe from crime and violence (ranked 14th), including terrorism. On the other hand, health and hygiene remains an area of concern (52nd), with a relatively low physician density and a lack of access to improved drinking water that places the country 78th. Tunisia's competitiveness could also be improved with a more conducive regulatory environment, where it is ranked 42nd, with a less restrictive visa regime, for example.

**Egypt**, a country so rich in cultural heritage (with seven World Heritage sites), ranks a low 58th overall in the TTCI. And this is despite a number of clear strengths beyond the cultural richness. For example, Egypt has excellent price competitiveness, where it is ranked 5th overall with low comparative prices, including fuel prices, and relatively low ticket taxes and airport charges. Further, there is a prioritization by the government of the sector, with relatively high government spending on Travel & Tourism and ensuring the country's presence at major tourism fairs. This level of prioritization is reflected in some policy areas such as the favorable policy on visa requirements, ranked 15th overall. On the other hand, the country's infrastructure is somewhat underdeveloped, particularly tourism infrastructure (85th) and ICT infrastructure (74th). An upgrading of the quality of the country's human resources available to work in the sector, ranked 69th, would also improve the country's overall T&T competitiveness.



## Sub-Saharan Africa

**Mauritius** is by far the most competitive country in the region with regard to Travel & Tourism; it is ranked 39th overall, a ranking that is attributable to a number of strengths. To begin, Mauritius demonstrates significant openness to tourism, with the sector representing an important part of the economy and the general attitude of the population to foreign travelers being quite welcoming. This openness is buttressed by great support from the government, which demonstrates the greatest prioritization of the industry of all countries analyzed. The country's tourism infrastructure is quite well developed, ranked 38th overall, with a high concentration of hotel rooms and many major car rental companies operating in the country. And with regard to human resources, the country has strengths in the area of education—having attained universal primary enrollment—and with quite good on-the-job training (ranked 33rd). And although there are some areas of concern, compared with other countries in the region, Mauritius has excellent health indicators, including higher life expectancy and a very low HIV prevalence rate—among the very lowest in the world—in a region with the highest prevalence rate in the world. On the negative side, there are some areas that could be addressed to further enhance Mauritius' competitiveness. For example, the policy environment could be improved; it is ranked a low 63rd in this area because of foreign ownership restrictions and rules on foreign direct investment, as well as a visa regime that could be simplified to allow foreign tourists to enter the country with less hassle (ranked 43rd). And although the government is seen to be making an effort to develop the industry in a sustainable way (ranked 7th), this could be backed up by more stringent and clearer environmental regulations (ranked 47th).

The rest of the countries of sub-Saharan Africa are situated quite a bit lower in the rankings. **South Africa** is the region's second-strongest performer, ranked 62nd in the TTCI. The country is endowed with a significant number of World Heritage sites, placing it 30th overall in this indicator. Infrastructure in the country is also well developed, particularly for the region. Specifically, its air transport infrastructure gets good marks (ranked 30th), as well as its ground transport infrastructure (35th), with a particularly good assessment of road quality. Some aspects of the regulatory environment are conducive to the sector's development, such as the excellent protection of property rights and visa requirements that are not extremely onerous. In particular, environmental regulation is a strength, with the government prioritizing the sustainable development of the sector quite strongly. And the government is seen to be prioritizing the development of the T&T sector as a whole, through, for example, effective destination marketing (ranked 16th) and ensuring attendance at tourism fairs (35th). However, there are also some areas of

weakness that have brought down the country's overall ranking. Safety and security is of serious concern (ranked 95th), with the costs of crime and violence in particular ranked a low 112th. The country also has weaknesses in the area of health and hygiene, where it is ranked 82nd overall, with a low physician density (84th) as well as concerns about access to improved sanitation (70th) and drinking water (65th). Finally, there are some areas for improvement with regard to human resources. Although the country has quite good educational indicators, such as educational enrollment rates and on-the-job training by companies, health indicators are extremely worrisome. South Africa's life expectancy is very low at 48 years, placing the country 111th overall, related in large part to the very high rates of communicable diseases such as HIV/AIDS and tuberculosis. The situation is thus one of precariousness with regard to the quality of human resources available for the T&T sector, as well as all sectors in the economy.

The next most competitive T&T sector in the region is in **Botswana**, ranked 70th overall. Botswana, known for its beautiful natural parks, is evaluated very highly in terms of its nationally protected areas, where it is ranked 19th, and its lack of environmental damage. The country also does quite well in terms of price competitiveness, where it is ranked 16th; this is not attributable to price differences with richer countries (Botswana's price level as measured by purchasing power parity places it 65th overall, or slightly more expensive than the average). Instead, this is attributable to low ticket taxes and airport charges (16th), for example, and a favorable tax regime in the country (16th). However, the country does also have some weaknesses that lead to the rather low ranking overall. The policy environment is not extremely conducive to the development of the sector. Although the country does not have an onerous visa policy (where it is ranked 15th), foreign direct investment and ownership are somewhat restricted and property rights are not sufficiently protected. There are also some concerns in the area of health and hygiene because of a very low physician density (96th) and very limited access to improved sanitation (also 96th). Further, unlike South Africa, Botswana's transport infrastructure is somewhat underdeveloped, as is its tourism infrastructure, with a low hotel room concentration (71st) and a limited presence of international car rental companies (66th). Finally, similar to South Africa, the country is primarily held back by weaknesses in the area of human resources. Although primary education has become universal, secondary enrollment remains low at 75 percent (placing the country at a very low 78th place), and training facilities are also limited. But the greatest concern relates to the health of the workforce, where life expectancy of just 40 years places the country 121st, in a tie with Angola and Zambia and followed only by Zimbabwe. Botswana has the highest HIV prevalence rate of all countries covered (124th).

Looking much lower in the rankings, we see that **Zimbabwe**, a country with such rich natural and cultural resources, such as the famous Victoria Falls, is ranked a very low 107th overall. The country has five World Heritage sites and many nationally protected areas (national parks). Despite these strengths, which have attracted tourists to Zimbabwe over the years, the Index highlights mainly weaknesses in all of the other areas. Its policy environment is among the worst in the world, with very stringent foreign ownership restrictions (114th); in any event there is a complete lack of property rights in the country once those investments have been made (it is ranked a rock bottom 124th on this indicator). Safety and security is also a major concern, with high crime and violence and a lack of trust in the reliability of police services to protect from crime (112th), reflecting the general breakdown in law and order in the country in recent years. Human resources are also a serious weakness, with very low enrollment rates by international standards in primary and secondary education, and among the worst health indicators in the world: life expectancy is just 36 years, placing it last of all countries covered, at 124th (with HIV prevalence placing the country 122nd, and tuberculosis prevalence placing it 121st). Better governance will be imperative to get the country back on track for improved Travel & Tourism competitiveness.

## Conclusions

This chapter has introduced a new comprehensive index, the TTCI, which measures the T&T competitiveness of 124 economies spanning all regions of the world. The results have shown that, on average, high-income countries tend to do well in the overall rankings, a tendency that is generally attributable to their more-developed policy and infrastructure environments. Yet performance remains varied, with some economies demonstrating strengths across most areas, and others lagging behind.

Developing countries, on average, tend to score lower in the Index. This can be attributed to a large extent to the legacy of less-developed economies and structural endowments. However, some have made great strides, putting into place the necessary factors and policies to make developing the T&T sector attractive. More generally, the weaker performance of a number of countries in the developing world should be seen as an opportunity for sectoral improvements. As has been demonstrated in other industry sectors, there should be significant potential for learning from international success stories and leapfrogging to higher levels of T&T competitiveness.

It is our hope that, by highlighting success factors and obstacles to T&T competitiveness in these countries, the TTCI will serve as a useful tool for the business community and for national policymakers to work

together to improve the T&T competitiveness of their respective economies and thus contribute to improving growth prospects and the prosperity of their citizens.

## Notes

- 1 UNWTO, "Historical Perspective of World Tourism," available online at <http://www.unwto.org/facts/menu.html> (accessed December 2006).
- 2 See, for example, International Trade Centre UNCTAD/WTO (2005).
- 3 See the Tourism Satellite Accounting research of the World Travel & Tourism Council (WTTC) and Accenture (2006).
- 4 WTTC 2006b.
- 5 See the Tourism Satellite Accounting research of the World Travel & Tourism Council (WTTC) and Accenture (2006).
- 6 UNWTO, "Historical Perspective of World Tourism," available online at <http://www.unwto.org/facts/menu.html> (accessed December 2006).
- 7 UNWTO 2006.
- 8 International Trade Centre UNCTAD/WTO 2005.
- 9 See the Tourism Satellite Accounting research of the World Travel & Tourism Council (WTTC) and Accenture (2006).
- 10 Wason 2001.
- 11 See the Tourism Satellite Accounting research of the World Travel & Tourism Council (WTTC) and Accenture (2006).
- 12 See UNCED (1992).
- 13 For more details on the WTTC's Competitiveness Monitor, see chapter 1.3 of this *Report* by Richard Miller.

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## Appendix A: Composition of the Travel & Tourism Competitiveness Index

This appendix provides details about the construction of the Travel & Tourism Competitiveness Index (TTCI). The TTCI is composed of three subindexes: the T&T regulatory framework subindex, the T&T business environment and infrastructure subindex, and the T&T human, cultural, and natural resources subindex. These subindexes are, in turn, composed of the 13 pillars of T&T competitiveness shown below: namely, policy rules and regulations, environmental regulation, safety and security, health and hygiene, prioritization of Travel & Tourism, air transport infrastructure, ground transport infrastructure, tourism infrastructure, ICT infrastructure, price competitiveness in the T&T industry, human resources, national tourism perception, and natural and cultural resources. These pillars are calculated on the basis of both “hard data” and “Survey data.”

The Survey data comprise the responses to the World Economic Forum’s Executive Opinion Survey and range from 1 to 7; the hard data were collected from various sources, which are described in the Technical Notes and Sources section at the end of the *Report*. All of the data used in the calculation of the TTCI can be found in the Data Tables section of the *Report*.

The standard formula for converting each hard data variable to the 1-to-7 scale is

$$6 \times \left( \frac{\text{country value} - \text{sample minimum}}{\text{sample maximum} - \text{sample minimum}} \right) + 1$$

The sample minimum and sample maximum are the lowest and highest values of the overall sample, respectively. For some variables, a higher value indicates a worse outcome. For example, higher carbon dioxide damage is bad. In this case we “reverse” the series by subtracting the newly created variable from 8. In some instances, adjustments were made to account for extreme outliers in the data.

Each of the pillars has been calculated as an unweighted average of the individual component variables. The subindexes are then calculated as unweighted averages of the included pillars. In the case of the human resources pillar, which is itself composed of three subpillars (education and training, availability of qualified labor, and workforce wellness), the overall pillar is the unweighted average of the three subpillars. The overall TTCI is then the unweighted average of the three subindexes.

The variables of each pillar and subpillar are described below. If a variable is one of hard data, this is indicated in parentheses after the description.

### Subindex A: T&T regulatory framework

#### Pillar 1: Policy rules and regulations

- 1.01 Foreign ownership restrictions
- 1.02 Property rights
- 1.03 Rules governing foreign direct investment
- 1.04 Visa requirements (hard data)
- 1.05 Openness of bilateral Air Service Agreements (hard data)

#### Pillar 2: Environmental regulation

- 2.01 Stringency of environmental regulation
- 2.02 Clarity and stability of environmental regulations
- 2.03 Government prioritization of sustainable Travel & Tourism

#### Pillar 3: Safety and security

- 3.01 Business costs of terrorism
- 3.02 Reliability of police services
- 3.03 Business costs of crime and violence

#### Pillar 4: Health and hygiene

- 4.01 Government efforts to reduce health risks from pandemics
- 4.02 Physician density (hard data)
- 4.03 Access to improved sanitation (hard data)
- 4.04 Access to improved drinking water (hard data)

#### Pillar 5: Prioritization of Travel & Tourism

- 5.01 Government prioritization of the T&T industry
- 5.02 T&T government expenditure (hard data)
- 5.03 Effectiveness of marketing and branding to attract tourists
- 5.04 T&T fair attendance (hard data)

### Subindex B: T&T business environment and infrastructure

#### Pillar 6: Air transport infrastructure

- 6.01 Quality of air transport infrastructure
- 6.02 Available seat kilometers (hard data)
- 6.03 Departures per 1,000 population (hard data)
- 6.04 Airport density (hard data)
- 6.05 Number of operating airlines (hard data)
- 6.06 International air transport network

#### Pillar 7: Ground transport infrastructure

- 7.01 Road infrastructure
- 7.02 Railroad infrastructure
- 7.03 Port infrastructure
- 7.04 Domestic transport network

#### Pillar 8: Tourism infrastructure

- 8.01 Hotel rooms (hard data)
- 8.02 Presence of major car rental companies (hard data)
- 8.03 ATMs accepting Visa cards (hard data)

#### Pillar 9: ICT infrastructure

- 9.01 Extent of business Internet use
- 9.02 Internet users (hard data)
- 9.03 Telephone lines (hard data)

## Appendix A: Composition of the Travel & Tourism Competitiveness Index *(cont'd.)*

### Pillar 10: Price competitiveness in the T&T industry

- 10.01 Ticket taxes and airport charges (hard data)
- 10.02 Purchasing power parity (hard data)
- 10.03 Extent and effect of taxation
- 10.04 Fuel price levels (hard data)

## Subindex C: T&T human, cultural, and natural resources

### Pillar 11: Human resources

#### Education and training

- 11.01 Primary education enrollment (hard data)
- 11.02 Secondary education enrollment (hard data)
- 11.03 Quality of the educational system
- 11.04 Local availability of specialized research and training services
- 11.05 Extent of staff training

#### Availability of qualified labor

- 11.06 Hiring and firing practices
- 11.07 Ease of hiring foreign labor

#### Workforce wellness

- 11.08 HIV prevalence (hard data)
- 11.09 Malaria incidence (hard data)
- 11.10 Tuberculosis incidence (hard data)
- 11.11 Life expectancy (hard data)

### Pillar 12: National tourism perception

- 12.01 Tourism openness (hard data)
- 12.02 Attitude toward tourists
- 12.03 Recommendation to extend business trips

### Pillar 13: Natural and cultural resources

- 13.01 Number of World Heritage sites (hard data)
- 13.02 Carbon dioxide damage (hard data)
- 13.03 Nationally protected areas (hard data)
- 13.04 Business concern for ecosystems
- 13.05 Risk of malaria and yellow fever (hard data)



# Taking Travel & Tourism to the Next Level: Shaping the Government Agenda to Improve the Industry's Competitiveness

JÜRGEN RINGBECK, Senior Partner, Booz Allen Hamilton

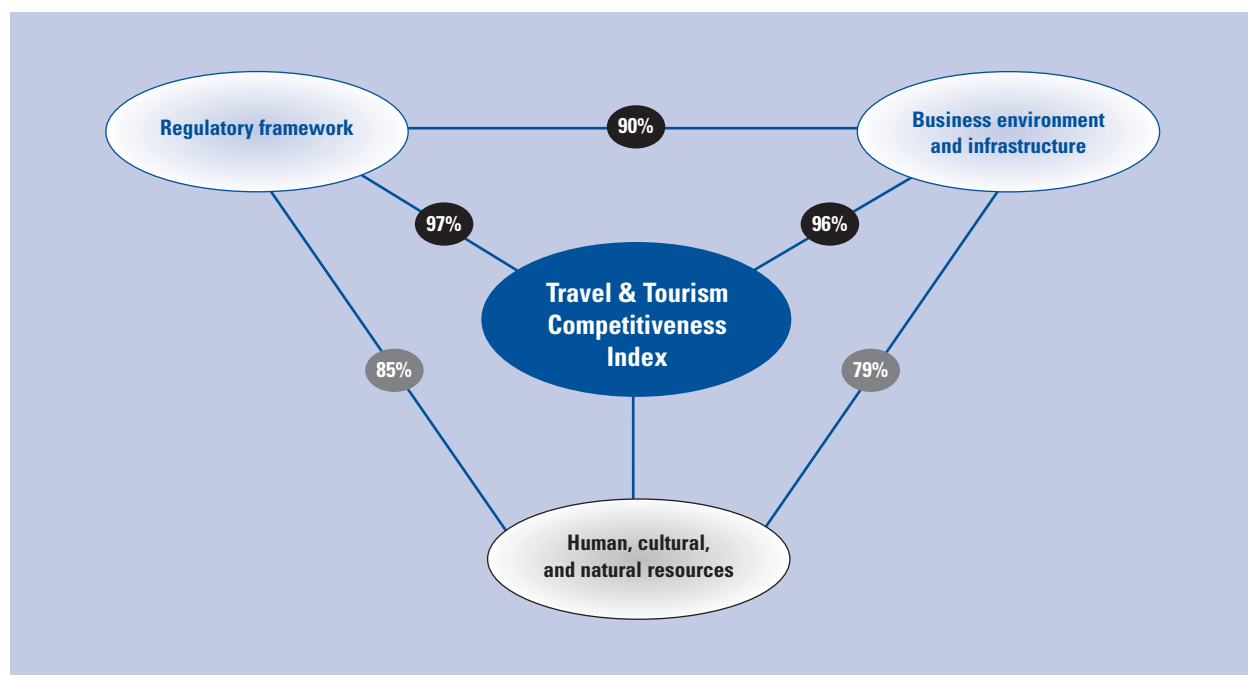
STEPHAN GROSS, Senior Associate, Booz Allen Hamilton

Governments all over the world are striving to support and increase the well-being of their citizens through sustainable economic growth and the resulting improvements in commercial and social welfare. As globalization brings every country closer together, Travel & Tourism (T&T) has become an increasingly important means of stimulating development, accelerating local investment, and boosting employment. But as the world grows smaller, the competition for business travelers and tourists is heating up. And everyone around the world has watched as disruptive forces such as pandemics and terrorism have adversely affected a country's T&T industry and even set back its entire economy. Given these conditions, what can countries do to sustain and improve their T&T industry, whatever their stage of economic development?

## Factors that impact the competitiveness of the T&T industry

The Travel & Tourism Competitiveness Index (TTCI) is a primary indicator of a country's T&T sector competitiveness. As such, it provides a useful measure to identify the critical success factors governments and business leaders need to foster a flourishing T&T industry. By using the TTCI to evaluate and compare an economy's T&T performance with the country's peers within their particular development stage, we have identified a number of "best practice" examples. These can help governments looking to improve the competitiveness of their own T&T sectors, and thus positively influence their country's economic growth.

The overall TTCI is built on three primary sub-indexes: the T&T regulatory framework subindex (1), the T&T business environment and infrastructure subindex (2), and the T&T human, cultural, and natural resources subindex (3). Together these are composed of a total of 13 pillars that, in turn, are made up of a total of 58 variables. Looking across the different components of the TTCI, it is evident that it pays off for governments to adopt a balanced regulatory framework that attracts private investors, facilitates access for domestic and international travelers, and encourages competition in the market. These factors improve the sector's operational efficiency, services, and price levels. State subsidies and government investments should be limited to areas that are not yet attractive enough for private investment, but always with the intention of moving toward a self-sustaining competitive environment—a necessary precondition for long-term growth. Keeping a good balance between maintaining regulatory control and providing business incentives that attract private investors provides the foundation for an efficient T&T sector.

**Figure 1: Overview of correlations between the TTCI and its subindexes**

Source: World Economic Forum; Booz Allen Hamilton analysis.

It is therefore not surprising that the regulatory framework and the business environment and infrastructure subindexes show the highest positive correlation in the TTCI: these two factors are correlated with the overall Index by 97 percent and 96 percent, respectively (see Figure 1). The high correlation of 90 percent between those two subindexes demonstrates that government policies are strongly related to the quality of the sector's business environment for Travel & Tourism. By providing a powerful regulatory framework that fosters the build-up of an efficient T&T environment, encourages private investments, and guarantees respect for the local culture and social welfare, government action obviously contributes directly to the sector's competitiveness.

**T&T regulatory framework.** Addressing the various factors that make up a country's regulatory environment is a prerequisite for sustainable growth in a country's T&T sector. The top factors that we found to be the most highly correlated with a country's T&T sector competitiveness are:

- ensuring political stability and a high standard of safety and security (80 percent),
- securing investments in the sector by adopting and maintaining favorable rules and regulations (80 percent),

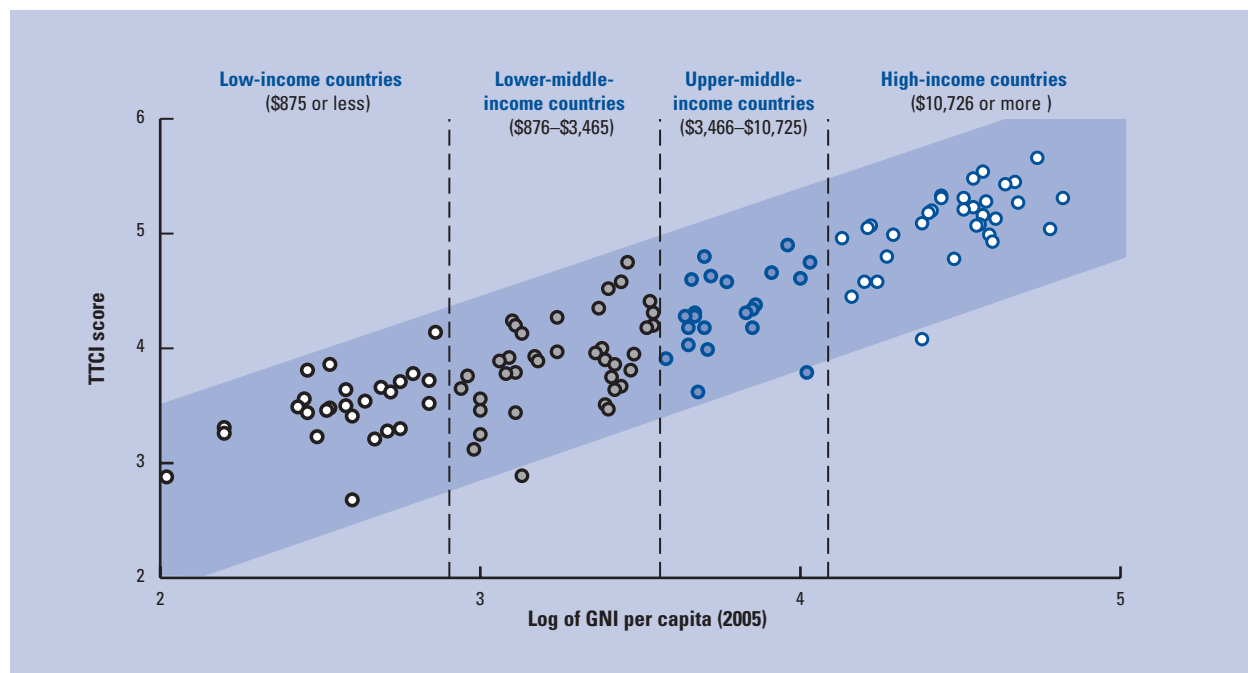
- maintaining high standards of health and hygiene for both citizens and travelers (86 percent), and
- implementing and monitoring environmental regulations (87 percent).

Political and economic stability is a critical prerequisite for attracting private capital, foreign investors, and international business travelers and tourists. Because the global business community is averse to very risky economic environments, countries with insecure legal policies are at a significant disadvantage when trying to leverage their business potential. Government regulations that encourage foreign ownership and direct investments, clearly define and protect property rights, and promote business foundations and technical innovation provide an effective framework for a competitive T&T industry.

If a country's regulatory environment allows its public and private sectors to work together effectively, sustainable growth can be strategically planned—further stimulating the sector's potential and defending it against severe disruptions from external events beyond its direct control.

**T&T business environment and infrastructure.** In addition to a well-designed regulatory framework, an efficient business environment and transport infrastructure is a key driver that directly influences the competitiveness of a country's T&T industry. Ground, air, tourism, and information and communications technology



**Figure 2: TTCI score vs. gross national income per capita**

Source: World Bank, 2005; World Economic Forum; Booz Allen Hamilton analysis.

infrastructure are key factors that correlate highly with a country's overall TTCI. Those factors include:

- an accessible, high-quality air traffic network—for example, in terms of routes, frequencies, and number of destinations offered (84 percent);
- established tourism infrastructure, such as a high density of hotels, rental car companies, and banks (86 percent);
- a well-developed ground transportation network, including roads, railroads, mass transit, port facilities, and waterways (89 percent); and
- broad coverage of Information and Communication Technologies (ICT) services, such as television, telephones, and high-speed Internet access (90 percent).

To attract private investors to a country's T&T economy, governments need to create a business environment that provides the required air, ground, and tourism networks, either through direct government investment or state subsidies, or by entering into public-private partnerships for those projects too difficult for a state authority or a single company on its own. Involving private investors in infrastructure projects deepens everyone's long-term commitment to the sector. Such commitment benefits not only those who work in the T&T industry or use its services, but also the surrounding community, thanks to the tax revenues the sector generates. Finally, information technology—whether it

be e-booking services, travel and vehicle management systems, or Radio Frequency Identification (RFID) technologies for baggage and passenger tracking—plays a critical role throughout the T&T value chain, boosting efficiency and service quality.

**Stages of Development.** The importance of the various factors that make up the TTCI is likely to vary depending on each country's stage of development. Although some of the factors are a “must have” for high-income economies, they might not yet be absolutely necessary for developing countries. Political stability, for instance, is a prerequisite for any country looking to attract foreign business and international travelers; government investments in environmental protection and new technologies, on the other hand, might become relevant only once basic infrastructure is in place. A less-developed country that is in the process of building up its air and ground transport network may consider environmental regulations a secondary priority.

Comparing economies within each stage of development makes it possible to identify specific key success factors and lessons learned that are specifically applicable within each peer group (see Figure 2).

Travel & Tourism naturally increases as a country's economic and social welfare improves, and as it does so, it becomes more important to its government and business leaders. That is why the TTCI naturally ranks advanced economies higher than countries at lower stages of development. Taking the gross national income (GNI) per capita as an indicator, it shows that the first 27 rankings in the TTCI are all countries that belong to

**Table 1: Top 10 TTCI rankings based on stage of development**

| HIGH-INCOME PEER GROUP |                |       | UPPER-MIDDLE-INCOME PEER GROUP |                 |       |
|------------------------|----------------|-------|--------------------------------|-----------------|-------|
| Index rank             | Economy        | Score | Index rank                     | Economy         | Score |
| 1                      | Switzerland    | 5.66  | 28                             | Estonia         | 4.90  |
| 2                      | Austria        | 5.54  | 29                             | Barbados        | 4.86  |
| 3                      | Germany        | 5.48  | 31                             | Malaysia        | 4.80  |
| 4                      | Iceland        | 5.45  | 35                             | Czech Republic  | 4.75  |
| 5                      | United States  | 5.43  | 37                             | Slovak Republic | 4.68  |
| 6                      | Hong Kong SAR  | 5.33  | 39                             | Mauritius       | 4.63  |
| 7                      | Canada         | 5.31  | 40                             | Hungary         | 4.61  |
| 8                      | Singapore      | 5.31  | 41                             | Costa Rica      | 4.60  |
| 9                      | Luxembourg     | 5.31  | 45                             | Chile           | 4.58  |
| 10                     | United Kingdom | 5.28  |                                |                 |       |

| LOWER-MIDDLE INCOME PEER GROUP |                    |        | LOW-INCOME PEER GROUP |            |       |
|--------------------------------|--------------------|--------|-----------------------|------------|-------|
| Index rank                     | Economy            | Score  | Index rank            | Economy    | Score |
| 34                             | Tunisia            | 4.76   | 65                    | India      | 4.14  |
| 43                             | Thailand           | 4.58   | 80                    | Tanzania   | 3.86  |
| 46                             | Jordan             | 4.52   | 84                    | Gambia     | 3.81  |
| 48                             | Jamaica            | 4.41   | 88                    | Vietnam    | 3.78  |
| 50                             | Dominican Republic | 4.35   | 91                    | Mongolia   | 3.72  |
| 54                             | Bulgaria           | 4.31   | 92                    | Mauritania | 3.71  |
| 57                             | Morocco            | 4.27   | 94                    | Zambia     | 3.66  |
| 58                             | Egypt              | 4.24   | 96                    | Cambodia   | 3.64  |
| 59                             | Brazil             | 4.20   | 98                    | Kenya      | 3.62  |
| 60                             | Indonesia          | 4.20   | 101                   | Uganda     | 3.56  |
| (71)                           | (China)            | (3.97) |                       |            |       |

Source: World Economic Forum; Booz Allen Hamilton analysis.

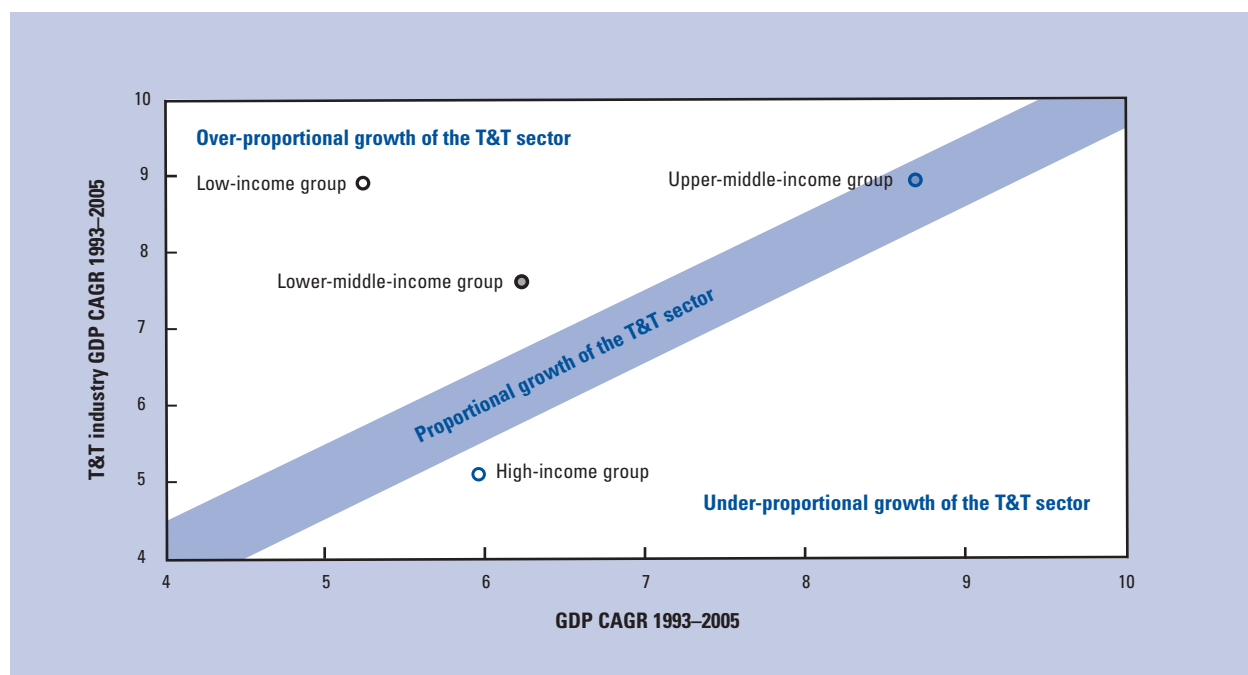
the high-income category. Only seven high-income economies have been surpassed by countries in either the upper-middle-income or the lower-middle-income categories. Looking at the TTCI score bandwidth within the four different country groupings shows that some economies emerge as high performers relative to their peers—serving as a first starting point for a more detailed investigation of key success factors that drive an economy's T&T competitiveness. Table 1 highlights the top 10 “fly-wheel” countries for each of the four segments shown in Figure 2, illustrating their overall TTCI rank and their respective scores.

According to the World Tourism & Travel Council (WTTC), China's T&T demand is expected to grow 8.9 percent by 2013—adding an astonishing 11.5 million new jobs in this sector. Since in both absolute and relative terms China's T&T economy grows at an impressive speed and thus serves as a good case example, we show it in the table of lower-middle-income countries even though it does not rank in the top 10 scores but comes “only” in 14th place among the other 39 economies in its peer group.

### **Travel & Tourism as a driver of economic growth: The application of best practice examples across defined peer groups**

As the pace of globalization has increased, many countries have experienced rapid GDP growth rates over the past few years. In such countries, Travel & Tourism is taking off at the same speed, granting people first-time access to foreign travel destinations and directly adding to domestic economic development. With its direct and indirect impacts on overall welfare, Travel & Tourism may be a key enabler helping low-income, lower-middle-income, and upper-middle-income countries to move upward into the ranks of the more advanced nations. Virtually every country in the three less-developed categories are achieving relatively high T&T growth rates, suggesting that they are investing heavily in this sector in hopes of moving toward the next development stage. Going beyond the individual TTCI scores and comparing average GDP growth with increase in GDP specific to the T&T sector reconfirms this trend: low-income and lower-middle-income countries show proportionally higher than average sector growth rates compared to the other country segments (see Figure 3).

If supported by open domestic market conditions—fostered by a focused and well-balanced political and regulatory approach—Travel & Tourism can provide promising economic opportunities in many countries, especially among low-income and lower-middle-income

**Figure 3: Travel & Tourism industry vs. overall economic growth**

Source: WTTC, 2006a; EIU, 2006; Booz Allen Hamilton analysis.  
 Note: CAGR is the compound annual growth rate.

nations. In that way boosting the T&T sector can help equalize economic differences among countries and become a major contributor to a nation's overall welfare. Countries that understand the positive impact of Travel & Tourism on their overall economies—and thus outperform their peer group's average—make excellent “best practice” case studies for understanding how and why a focus on Travel & Tourism pays off.

#### Case Study 1: High-income economy group: Hong Kong SAR and Iceland

The T&T markets in the high-income economies of the western hemisphere are highly sophisticated from both a demand and a supply perspective. As these economies' T&T sectors reach a high level of saturation, the sector's average top-line growth typically becomes relatively moderate.

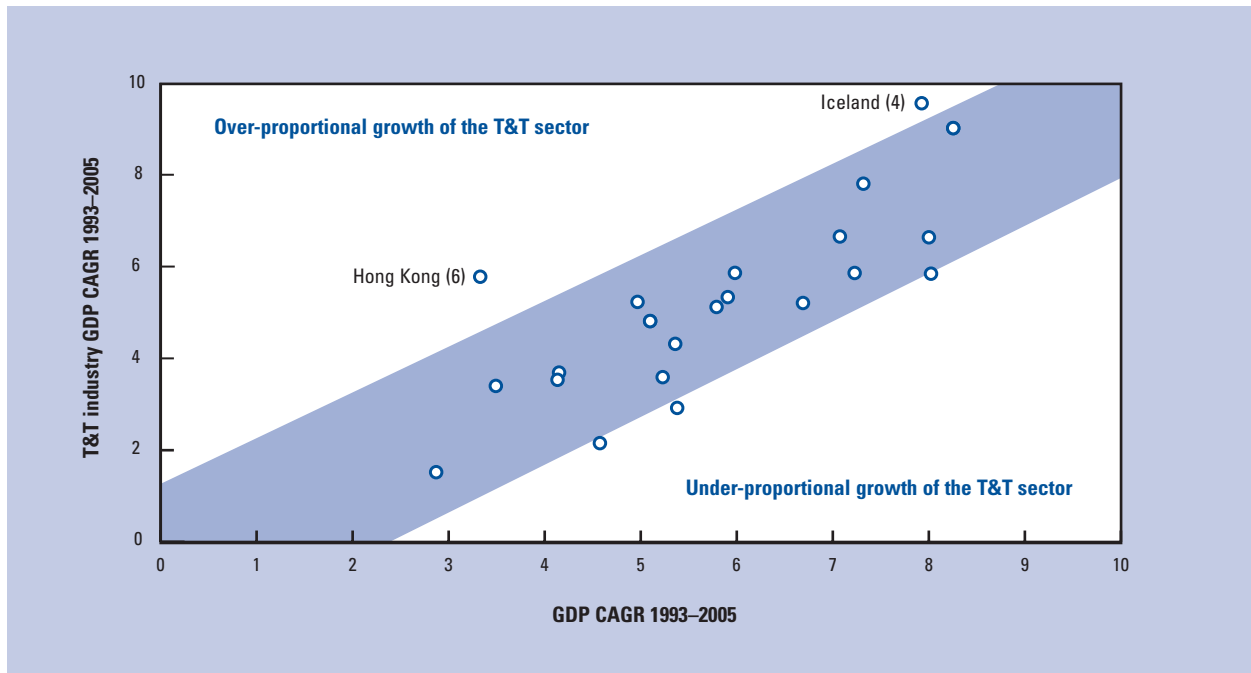
Some regions, however, are breaking the rule. Iceland and Hong Kong could hardly be more different, but both have managed to grow their T&T industries more quickly than the average of their peers (see Figure 4). A detailed look at Hong Kong and Iceland (ranked 6th and 4th, respectively, in the TTCI) makes clear the initiatives and policies each country has taken to drive their industries to perform so well.

The United Kingdom handed Hong Kong back to China in 1997. The immediate effect in Hong Kong was a sudden and severe economic collapse, as private investors feared that public policies and regulations would be tightened, thus increasing overall business risks; that fear also affected the tourism industry. But the

worst-case scenario did not take place: TTCI results show that Hong Kong ranked second in the policy rules and regulations pillar, particularly in the categories of favorable foreign direct investments and lack of foreign ownership restrictions.

Since the handover, Hong Kong has succeeded in restoring both its markets and its tourism industry. The Hong Kong Tourism Board (HKTb) was established in early 2001 as an independent cross-sector network for promoting the travel industry from both the demand and the supply sides. The board's activities range from global and regional marketing campaigns, monitoring the industry's quality standards and improvement efforts, and providing guidance to the domestic industry to supporting the further development of Hong Kong as a world-class tourism destination. Today, Hong Kong is a very successful Asian destination for shoppers from all across the world. And it has become the gateway to the People's Republic of China, a trend that has also steadily increased visitors flows. Meanwhile, city officials are considering the privatization of the Hong Kong Airport—the plan is to float 25 percent of the airport's shares—the main goal being to subject the airport to even stronger market and commercial discipline.

An island on the outskirts of the inhabited world, Iceland isn't as easy for visitors to reach as Hong Kong is. In the past, Iceland has been a major destination for “eco-tourists,” but the country is making a major effort to place its tourism industry on more than one leg. By combining effective marketing efforts with a clear economic liberalization policy, Iceland has successfully

**Figure 4: High-income economy group: Travel & Tourism industry vs. overall economic growth**

Source: WTTC, 2006a; EIU, 2006; Booz Allen Hamilton analysis.

Note: Numbers in parentheses show the economy's TTCI rank and its position within its peer group. CAGR is the compound annual growth rate.

managed to redirect a significant share of international convention travelers to Reykjavik, a success that shows up in the country's number 5 ranking in the T&T regulatory framework subindex.

Iceland's banking sector clearly demonstrates how privatization has aided the island's overall economy. Privatization has allowed banks to compete far beyond the island's borders, attracting an increasing number of business travelers to the country. Within Iceland's T&T sector, privately held conglomerate Icelandair has succeeded along the same lines by avoiding governmental influence or international alliances. Since its establishment as Icelandair resulting from a merger of two domestic airlines in 1973 it has expanded rapidly, and in 2004 it bought a 10 percent stake in EasyJet. Although based in a domestic market of only 300,000 people, Icelandair transported roughly 1.5 million passengers in 2005 and Reykjavik has established itself as a hub for international traffic, carrying more than a third of its passengers on transatlantic flights.

#### Case Study 2: Upper-middle-income economy group: Estonia and the Slovak Republic

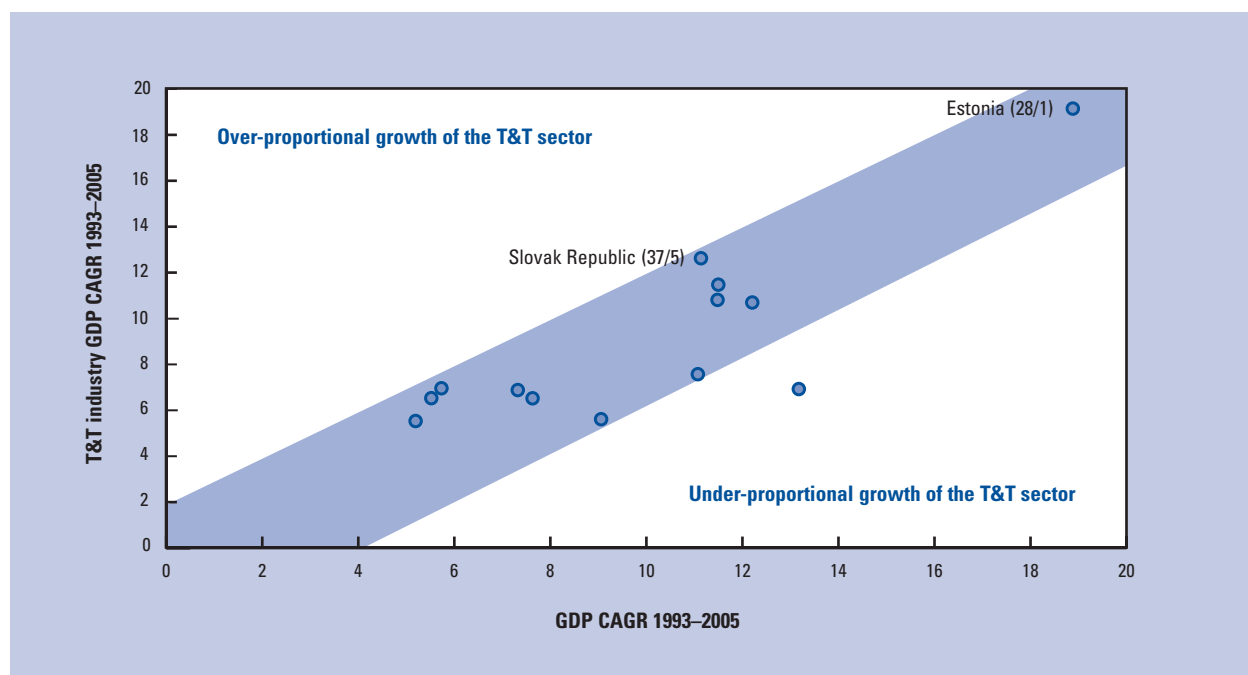
As the European Union has expanded its borders into Eastern Europe, with the result that its markets there are continuously opening up to private investors, a fresh group of small countries have become tourist destinations and dynamic business climates. So it is not surprising that some Eastern European countries rank relatively high in the overall index, with T&T sectors growing faster than their overall economies (see Figure 5).

Estonia emerges as a high flyer at rank 28, leaving other more advanced countries—such as Italy, at rank 33—behind.

Since several low-cost carriers expanded their networks to Tallinn, tourists have been pouring into the country in growing numbers. In order not to get branded as a destination for “booze trips” from its western neighbors, Estonia's Tourism Board is following a multiple strategy:

- First, to keep the travel industry growing steadily, low-budget tourists have remained a top priority.
- Second, the country has worked to brand itself as a tourist destination with a strong cultural heritage and traditional countryside getaways.
- Third, Estonia is keeping an eye on newly emerging sources of tourism, especially Russian tourists, and has decided to significantly ease visa requirements for short-term travelers.

Since Estonia joined the European Union in 2004, it has followed the path of privatization of former state-owned businesses. In late 2004, the privately held Go Group was set up to consolidate a number of transportation and hospitality companies in order to raise efficiency and provide better service to Estonians and visitors alike. The group is made up of four businesses—international train services, bus services, tourism, and a hotel business—operating under one integrated brand.

**Figure 5: Upper-middle-income economy group: Travel & Tourism industry vs. overall economic growth**

Source: WTTC, 2006a; EIU, 2006; Booz Allen Hamilton analysis.

Note: Number in brackets shows the country's TTCI rank and its position within its peer group. CAGR is the compound annual growth rate.

With its strong focus on improving infrastructure access and efficiency, it is not surprising that Estonia scores relatively high in the T&T business environment and infrastructure subindex, ranking 25 and outperforming such high-income countries as Belgium, Greece, and Ireland.

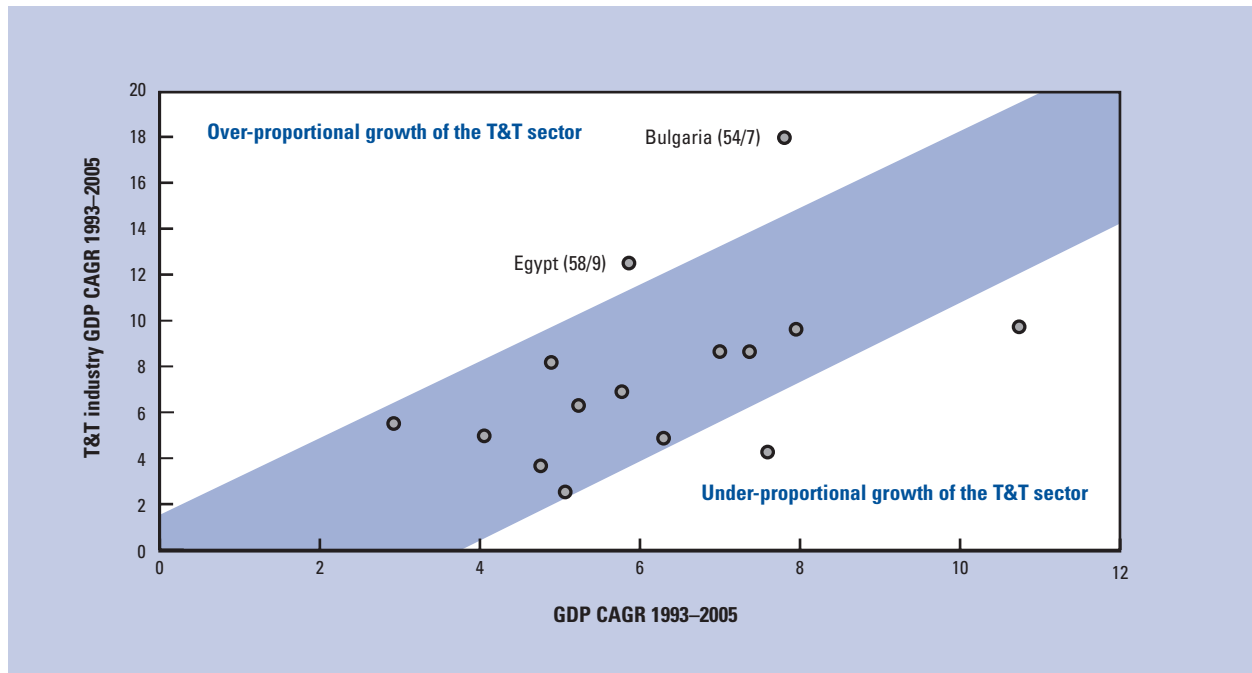
The Slovak Republic has chosen a similar path. It has successfully built its capital, Bratislava, into a dynamic business hub that attracts multinational manufacturing and corporate affiliations, thanks to its flat-tax scheme and low prices. The Slovak Republic's aviation sector has taken off in recent years, with Bratislava airport emerging as a regional hub that has experienced double-digit growth in passenger traffic. Although the Slovakian government recently postponed the privatization of this airport, the country's largest air hub, the sale of a majority stake in the country's second-largest hub—Košice airport—has been finalized. It is not surprising that the Slovak Republic shows up among the top 20 percent within the TTCI's policy rules and regulations pillar, at rank 24.

Other outperforming countries in this peer group, such as Turkey and South Africa, already have a well-established reputation in the T&T industry, yet just in the past decade, Estonia and the Slovak Republic have managed to build up this sector virtually from scratch. They are now well positioned to continue their success stories, assuming they carry on their policies of economic and regulatory liberalization.

### Case Study 3: Lower-middle-income economy group: Bulgaria and Egypt

Several lower-middle-income economies have been using their long-standing, if underdeveloped, T&T industries as a stepping-stone to long-term economic stability to catch up to their economic peer group. Bulgaria and Egypt both rank in the top 10 in the TTCI group of lower-middle-income economies, significantly outperforming the group as a whole (see Figure 6).

Without its booming tourism industry, which has successfully redirected large numbers of travelers from Mediterranean beaches to the coast of the Black Sea, Bulgaria would continue to suffer from a sky-high trade deficit. Yet today the country celebrates its entrance into the European Union. Bulgaria intends to invest heavily in its sometimes archaic infrastructure in order to put its skyrocketing tourism industry on a more stable basis for further growth. As a sign of its strong economy and ambitious future plans, Bulgaria's government has drafted an ambitious plan to spend 3.3 billion euros on improving roads, railways, ports, and waste treatment facilities in the country by 2015. The plan will be funded in part by the European Investment Bank and in part through a variety of public-private partnerships (PPPs). Bulgaria is now looking to take its mass-tourism markets to the next level, with plans to develop more high-end offerings for visitors. Its success has allowed Bulgaria to score relatively well in the TTCI tourism infrastructure pillar, ranking 25 and outpacing several other well-established

**Figure 6: Lower-middle-income economy group: Travel & Tourism industry vs. overall economic growth**

Source: WTTC, 2006a; EIU, 2006; Booz Allen Hamilton analysis.

Note: Numbers in parentheses show the country's TTCI rank and its position within its peer group. CAGR is the compound annual growth rate.

tourism destinations, such as the Dominican Republic (39), Tunisia (45), and Thailand (53).

Thanks to its incomparable cultural heritage and a coastline perfect for seaside vacationers and scuba divers, T&T is one of Egypt's key engines of economic growth, contributing close to 8 percent of the country's GDP and 28 percent of total investments. While other sectors of the economy remain state-run and highly regulated, there are no such limits in the tourism industry. For example, Egypt's government has long allowed unlimited foreign direct investments, granted the right to liquidate and transfer capital and profits abroad, and adopted open skies policies for all major tourism airports. This has helped the Egyptian travel industry to overcome several disasters, such as the Luxor attacks of 1997. Today, Egypt has undertaken an extensive tourism development program aimed at expanding its already-rich offerings, with, for example, a special focus on short getaways for Middle East visitors. Egypt's focus on its T&T sector is strongly confirmed in the country's exceptionally high score in the TTCI prioritization of Travel & Tourism pillar, where Egypt ranks 12 out of all 124 countries.

Although Egypt's tourist arrivals are growing at a greater rate than the world average, the country has not yet extracted the full value of its T&T industry. For example, Egypt's 24 natural protectorates and its Mediterranean coast still represent a large number of tourism "white spots"—areas that have yet to reach their full potential. These areas represent another way to increase average visitors' stays and to attract new forms

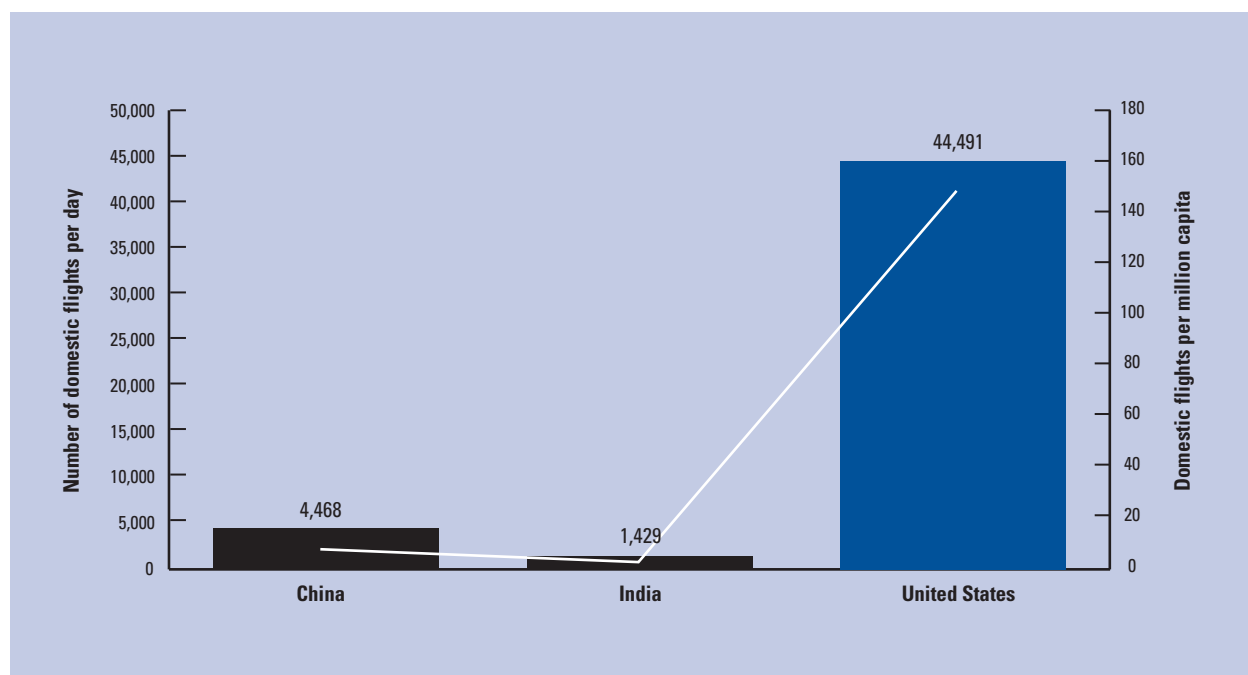
of tourism that have a higher value, such as eco-tourism. In addition, investments in shopping, entertainment, and conference facilities have lagged the region. This represents another opportunity to attract higher-value tourist segments such as Meetings, International Conferences, and Exhibitions (MICE) visitors and luxury shoppers.

Currently, Egypt is highly dependent on tour operators, which creates a mismatch between the supply and demand for hotel rooms. Although the average length of stay for a tourist in Egypt is high and increasing, the revenue per hotel room is low. This is due in part to aggressive resort package promotions offered by tour operators and the high rate of hotel room overcapacity; but it is also due to an underdeveloped domestic air and land transport network. Because tourists cannot easily travel around the country, they tend to stay in one city for the entire duration of their visit—thus visitors are spending more time in Egypt with very little incremental increase in spending.

To further improve T&T competitiveness Egypt needs to address these challenges, include balancing hotel capacity investments with demand characteristics, transferring knowledge from global hotel and airport operators to the local market, and capturing more value from long average stays per tourist.

#### Case Study 4: Growing giants: China and India

Because of their large populations, China and India are categorized as "lower-middle-income" and "low-income" countries, respectively, because their per capita gross national incomes are relatively low on average across

**Figure 7: Number of domestic flights per capita on a typical weekday**

Source: *OAG MAX Online* (accessed September 2006); Booz Allen Hamilton analysis.

Note: Domestic flights as scheduled on Wednesday, September 6, 2006

their overall population. Although they show strong economic growth in their industrial regions, there are still many rural areas with limited accessibility and transportation infrastructures.

However, both countries' strong and growing domestic demand and burgeoning workforce potential have long attracted international business. Both countries have been outpacing the rest of the world in terms of economic growth, and they represent huge markets for inbound tourism. But there are still significant differences in personal income and consumption between China and India and the industrialized world. Therefore, the two countries' T&T sectors are more likely to take off as domestic industries than as international tourism destinations, at least for the foreseeable future.

Figure 7 compares the total and relative number of domestic flights in China and India to domestic flights in the United States, an advanced air traffic market. Domestic travel demand in the two Eastern giants has great potential in the years to come.

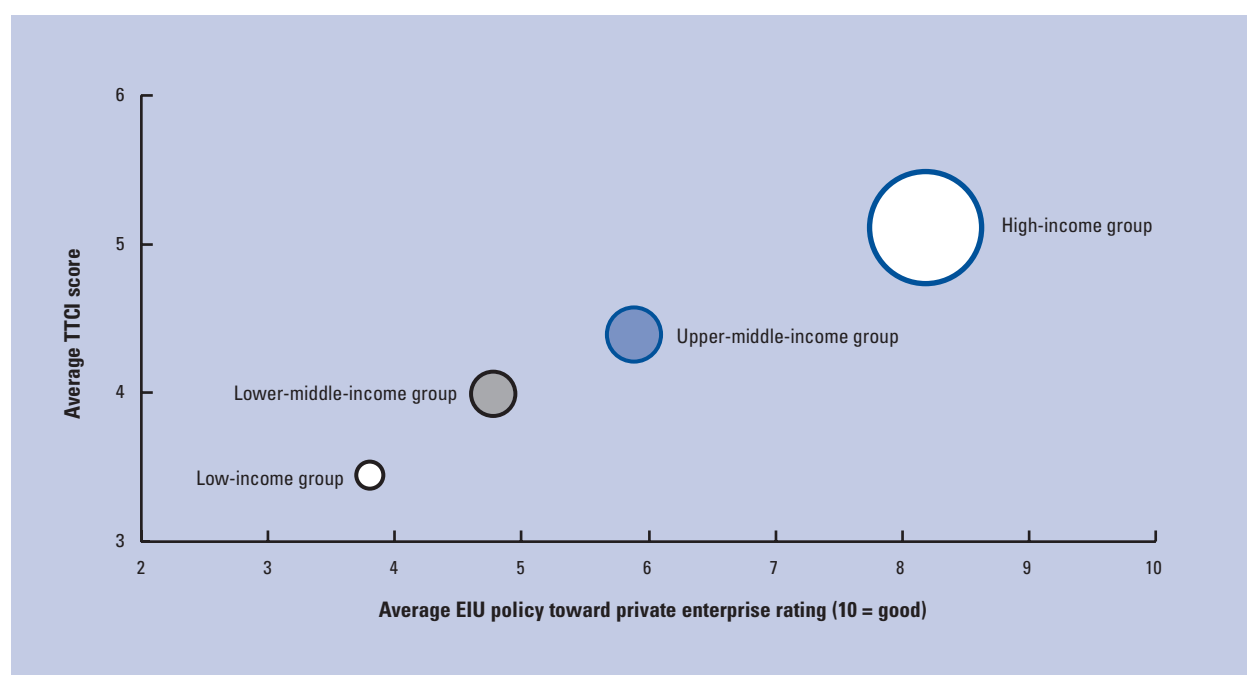
Although comparable in size and overall growth rates, a closer look at the two countries reveals different starting positions and perspectives for future development. China is looking ahead to the 2008 Olympics, to be held in Beijing, which will certainly boost the domestic as well as the international tourism industry. As a result, the Chinese T&T industry has already seen rapid growth over the past few years. According to the China National Tourism Administration, 31 million Chinese people traveled out of the country in 2005—a large number, but still a tiny figure compared with the country's

overall population. Domestic travel—with a total of 1.2 billion trips—has become the backbone of the Chinese tourism industry.

China's T&T sector has been a major beneficiary of the country's "open-door" policy, yet it remains one of the least progressive industries in terms of property-rights reform and financial performance. Most of China's tourism infrastructure is still publicly owned—the government still owns 63 percent of the country's hotels, for instance. That puts China near the bottom end of the tourism infrastructure pillar of the TTICI, at rank 113 out of 124. Just recently, however, the central government has proposed speeding up ownership reforms and encouraging the gradual withdrawal of state capital from commerce and distribution.

China's T&T score of 3.97 puts it below India, at 4.14, which would suggest that the country is not fully leveraging its potential in the sector. Yet China has been improving its ground and air infrastructure assets (through consolidation of its national airline industry, for instance), in order to keep up the pace of economic growth. And in order to boost business Travel & Tourism, the government plans to construct up to 50 new airports by 2010. Thus it ranks relatively high in the air and ground transport infrastructure pillars, at 36 and 45, respectively. In expanding its transport infrastructure, however, China should not forget about the economic split between its much wealthier eastern coast and the rural hinterland: While major economic centers such as Beijing, Shanghai, and the southern province of Guangdong are well served, the government must not



**Figure 8: Policy toward private enterprise rating vs. TTCI score (averages per defined peer group)**

Source: World Economic Forum; EIU, 2006; Booz Allen Hamilton analysis.

Note: Bubble size indicates overall average 2005 GDP of country cluster. The EIU Index rates countries between 1 and 10 on a variety of measures including protection of property rights and government attitudes to competition, with 1 being low and 10 being high. The average is made up of the 59 countries that are included in the EIU rating.

lose sight of the need to expand the infrastructure connecting the rest of the country.

India, meanwhile, has already gained a reputation as a popular tourist destination, with tourist arrivals expected to grow 10 percent annually for the foreseeable future. Yet India's tourism sector faces a number of constraints, including a severe shortage of budget hotels, regulatory barriers, high visa costs compared with neighboring regions, and significant delays for inbound travelers from South Asia. As a result, ranked 106, India is near the bottom end of the list in the visa requirements variable.

Within the low-income group of countries, however, India is far outperforming its peers, surpassing several countries in the lower-middle-income and even the upper-middle-income segments. In terms of infrastructure, accessibility, and safety, India shows relatively good scores, ranking 33 in air transport infrastructure and 40 in ground transport infrastructure. But, although India is among the fastest-growing aviation markets in the world, it has attained that position despite an infrastructure system that is still inadequate to deal with projected further growth. However, the country has plans for numerous major infrastructure projects, not just in the aviation sector, but in its road and rail systems as well. The Indian government and the US Federal Aviation Administration (FAA) have agreed on a major knowledge transfer effort to help develop and modernize the management, operations, and technology of India's civil aviation infrastructure.

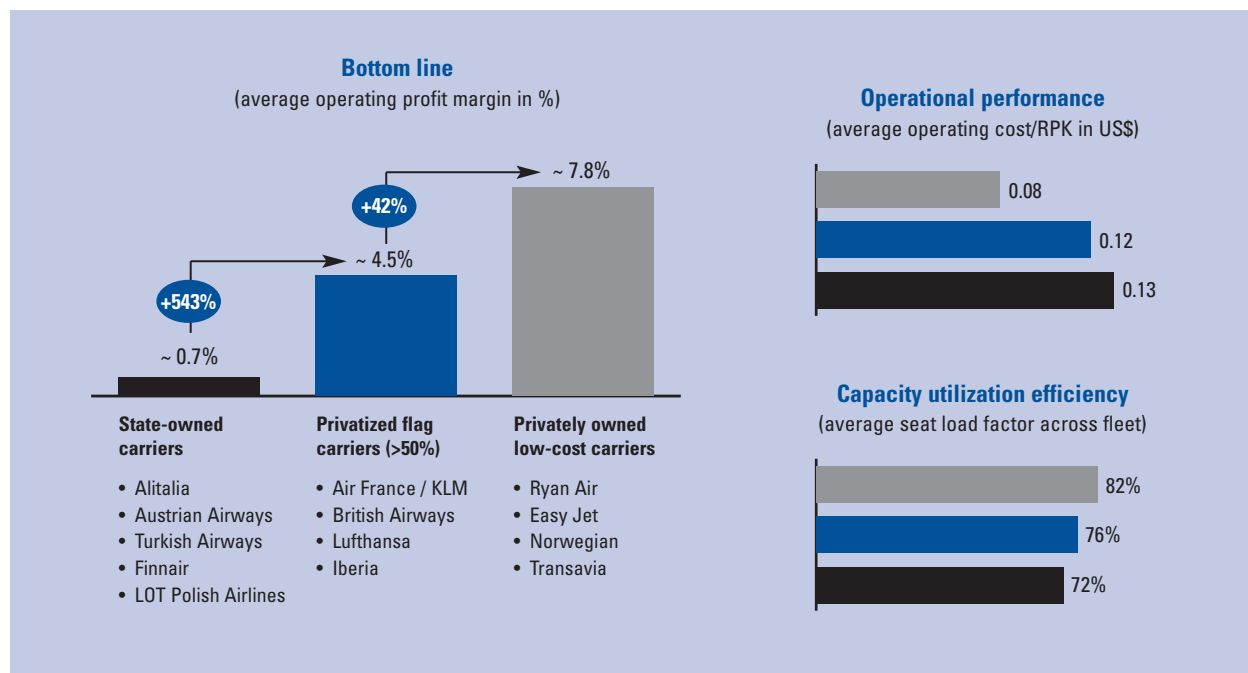
### **Deregulation and privatization: Increasing demand and improving T&T industry efficiency**

The T&T industry has established itself as an ongoing success story in countries both advanced and still developing. However, rapidly changing economic and social conditions mean that every country must maintain its pace of growth just to keep up with the competition around the world. That can happen only through further liberalization and deregulation of both the domestic and international T&T industry.

Over the past decades, most high-income countries have opened their domestic and international transport markets to competition. Today, these countries are profiting from a rock-solid tourism industry that lays the groundwork for long-term economic prosperity. The Economist Intelligence Unit (EIU) private enterprise rating, an indicator of a country's degree of economic liberalization, shows that the competitiveness of a country's T&T sector is very highly related to its degree of liberalization. Countries that engage in deregulation and privatization encourage competition, which forces all economic players to improve operational efficiency; that, in turn, drives up the T&T sector's competitiveness. Figure 8 indicates the relationship between the four economic groups' liberalization rating and their TTCI scores.

### **Case Study: Increasing T&T competitiveness by liberalizing the European aviation sector**

For Western Europe, the connection between economic liberalization and the competitiveness of its T&T sector

**Figure 9: State-owned vs. privatized European airlines**

Source: ATW, 2006; Booz Allen Hamilton analysis.  
Note: RPK = Revenue Passenger Kilometer.

can be seen in the two-decade-old history of Europe's decision to open up its aviation industry. The market's development since then has clearly shown that a cross-country liberalization plan can have a strong impact on growth, both within Travel & Tourism and beyond. Since the countries that make up Europe are at similar stages of development—they are all politically stable and boast comparable social welfare systems—Europe's experience with market deregulation provides valuable lessons that can be applied both domestically and internationally across borders.

The deregulation of the European aviation industry was driven by the 12 member states of the European Union at the time, under the basic premise of improving access and encouraging overall competition. This shift away from state protection opened the door not to the kind of competition that was first imagined (that of the state's respective flag carriers competing in each other's territories) but to competition in the form of new entrants. Indeed, once state subsidies were eliminated, some established carriers, such as Sabena, were forced into bankruptcy.

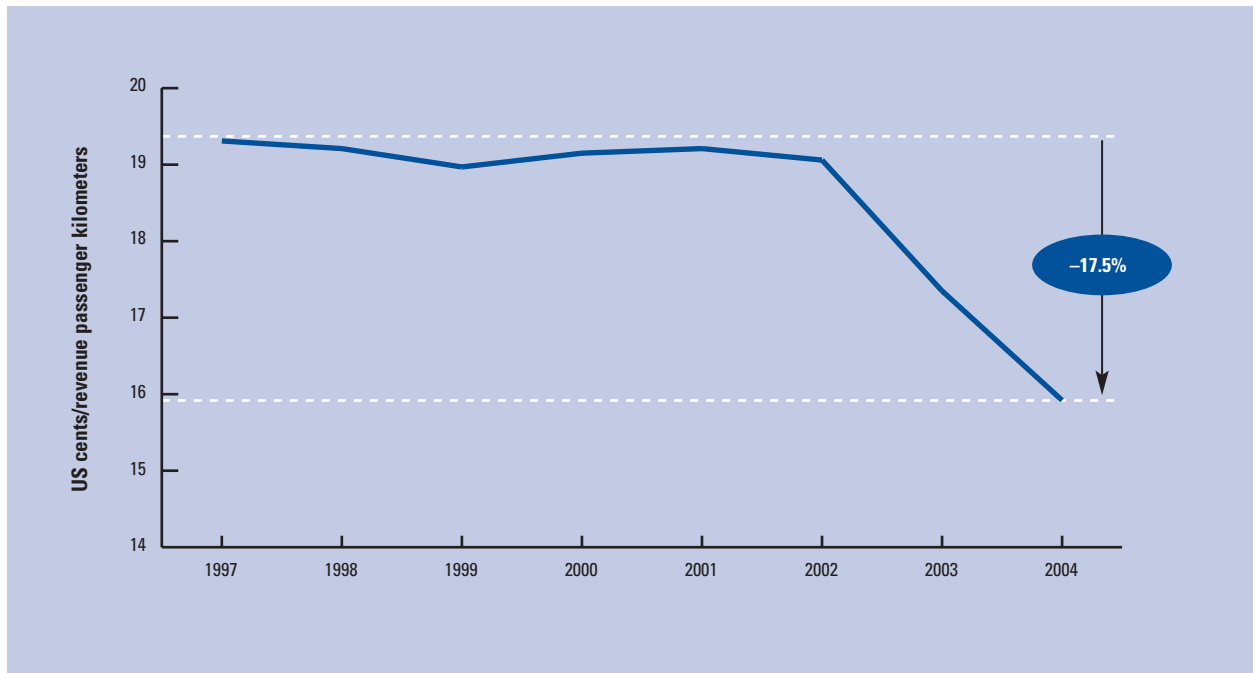
Once the airline market itself was deregulated, the European airport landscape entered into a phase of privatization, which started with the initial public offering of the British Airport Authority and was followed by many others. Now that the British air traffic service provider (NATS) has been privatized, and plans are on the table to sell off DFS (the German air traffic control provider), the overall European air traffic control sector is also expected to follow this trend soon.

The rise of the European aviation industry clearly demonstrates that privatization efforts pay off, even in the short term:

- Deregulation of the airline market triggered industry consolidation and fostered the development of broad domestic and international aviation networks.
- These global networks have provided better access to more destinations, stimulating air-travel demand and lowering prices.
- Communities throughout the region have seen higher employment and economic growth enabled by the increased access to and from key European business centers.

Meanwhile, most of the surviving flag carriers have transformed themselves from government air transport agencies into smart global players that compete successfully in a highly competitive and global business environment. In this market, ticket prices to the end-consumer are no longer subject to bilateral negotiations between country representatives, but to the principle of supply and demand under strong competition.

A comparison of fully privatized flag carriers with those in which governmental bodies still hold significant shares shows that airlines under private leadership operate much more profitably than state-owned airlines, thanks to their tighter rein on costs, better operational efficiency, and higher seat-load factors (see Figure 9).

**Figure 10: Yield development of European carriers (1997–2004)**

Source: AEA, 2005.

Note: Passenger revenue per kilometer at constant prices (1991).

The private investors who control the newly emerging European Low Cost Carriers demand even more efficiency, which shows up not only in the bottom line, but also in terms of better operational performance and capacity utilization.

Market deregulation has forced incumbent airlines into competition and introduced a wide range of new competing players into the marketplace, driving down overall market prices by more than 17 percent since 1997 (see Figure 10). Today, European travelers can choose from more direct connections within a vastly expanded route network. Most importantly, the rise of the low-cost carriers has shaken up not just the industry but customer behavior as well. Altogether, these market changes have added both more traffic and more money to the skies of Europe than was ever envisioned in the early days of liberalization.

For Travel & Tourism, basic infrastructure such as roads, rails, public transport, and—most importantly—airports are essential to get travelers into, around, and out of the country. In Western Europe, former state-owned airports that have been privatized during the last decade work significantly better than those still controlled by governments. Open market conditions in the airport sector have led to a variety of ownership and operating models for airports, ranging from state-owned to partially and fully privatized.

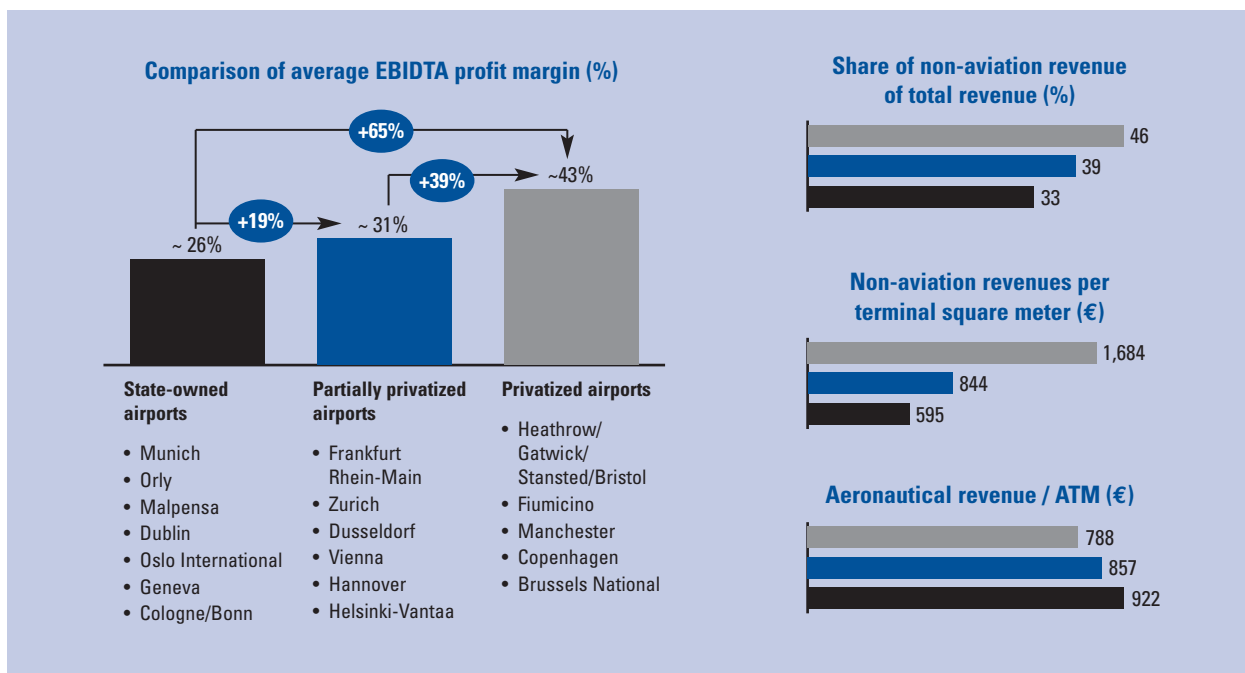
The connection between airport profitability and the degree of privatization makes clear the value private operators put on factors that go far beyond simply providing the necessary infrastructure. Such factors include

the importance of non-aeronautical revenue and the potential for improved efficiency that comes with new technologies. Putting more emphasis on the travelers themselves means a higher proportion of revenues from non-aviation operations. A benchmark of bottom-line performance among Europe's national and regional hubs reconfirms the efficiency gains privatized airports have made since deregulation (see Figure 11).

As a result of deregulation, all industry players have been forced to improve efficiency and to expand their network at competitive prices to survive competition. As a result, beyond the conventional growth that has occurred prior to deregulation (~6 percent), additional demand of approximately 81 million passengers has been stimulated, triggering an overall air traffic market increase of 20 percent since 2002 alone (see Figure 12). Meanwhile, the number of intra-community routes grew by more than 40 percent, creating an entirely new market of weekend travelers. Today, low-cost carriers carry nearly a fifth of all air passengers in Western Europe. Lower flight fares and new direct connections have attracted many European travelers to visit places they would not have gone to otherwise.

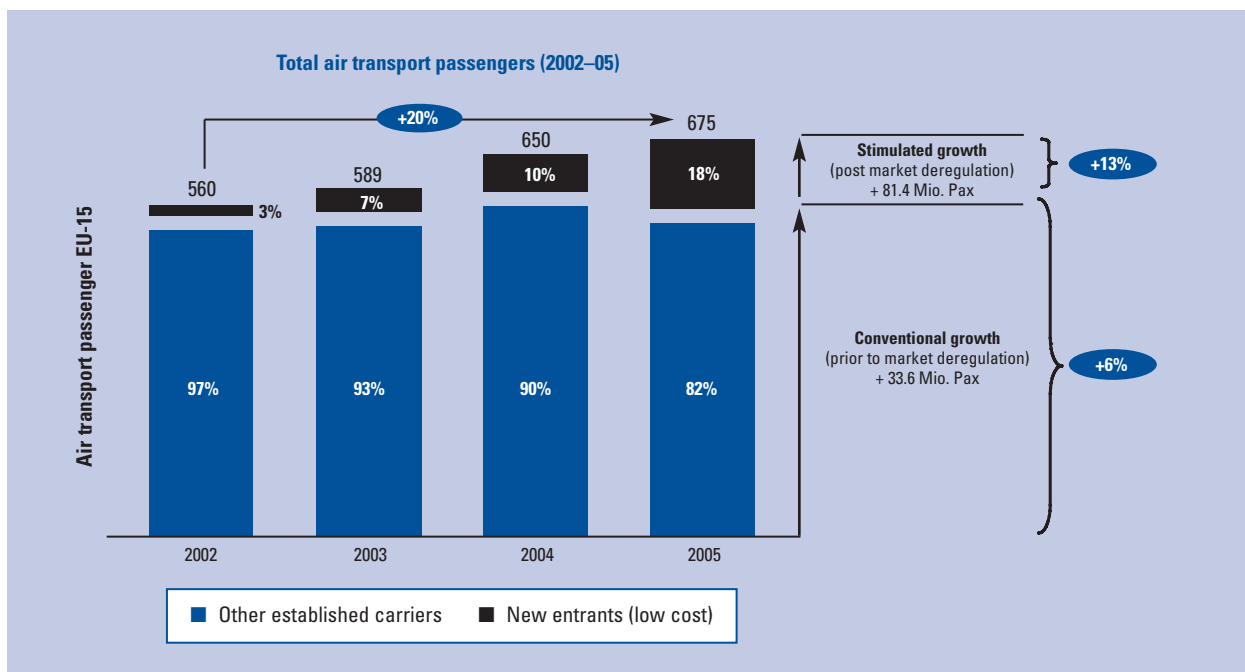
The deregulation of the European aviation sector has also contributed significantly to the growth of economic and social welfare in the European Union. Direct stakeholders in the aviation industry now account for 4 million jobs and €220 billion of added value—making up an additional 1.5 percent of Europe's gross domestic product (GDP).

Figure 11: Bottom-line differences of different airport ownership models



Source: Company Annual Reports, Booz Allen Hamilton analysis.

Figure 12: Growth of European air traffic demand after deregulation

Source: Eurostat, 2006; Eurocontrol, 2006; Booz Allen Hamilton analysis.  
Note: Numbers refer to intra-European traffic only.

## Lessons learned

The goal of this chapter has been to use the TTCI to lay out both a rationale and a strategy for how countries at various stages of economic development can make their T&T sectors more competitive. So how should countries in each of the four economic development groups help boost their T&T sectors? Here are some lessons learned.

**High-income economies.** These economies typically score high in the TTCI. However, that is not necessarily because they actively manage their T&T sectors, but because their overall economic environment—in terms of regulation, business environment, and resources—is favorable. In other words, these countries are not successful because their T&T industries are strong; rather, their T&T industry is successful because the countries themselves are strong. Their T&T infrastructure is state-of-the-art, not primarily for the sake of foreign visitors, but for the sake of their own citizens and businesses. Their advanced economies require a high level of regulatory sophistication, so industry policies and regulations are clearly defined and monitored. Even though mere size is not a factor in the TTCI, large countries such as the United States do benefit in their ranking from their economic power. Yet smaller high-income economies and regions, such as Iceland and Hong Kong, can make it to the top of the Index, too.

Nonetheless, even high-income countries have room to improve their T&T sectors. To do so, they should continue to fully leverage their existing potential and concentrate on preserving their T&T-related assets. For the first goal, an explicit T&T strategy and marketing campaign is instrumental; for the latter, consistent environmental regulations as well as rules for conservation of monuments, tourism sites, and areas of natural beauty are key factors.

**Upper-middle-income economies.** These boast many of the same advantages as high-income economies, and they should set similar goals for maximizing their T&T competitiveness. There is one major difference, however: most upper-middle-income economies are currently working to build up state-of-the-art infrastructure—transportation, information and communications technology, and the like—in the hopes of creating a business environment that the high-income economies already possess. The risk from the perspective of the TTCI is that upper-middle-income economies may focus too much on achieving world-class standards in basic industrial categories, leaving little attention for the T&T sector. If that happens, improved Travel & Tourism may end up the result of economic development, not a driver of it.

The upside of such a strategy is that, by building an advanced economy almost from scratch, countries can avoid a lot of the entrenched structures and legacy issues—the complex taxation models and multiple layers of regulation—that still hinder some of the more advanced countries. Furthermore, because they can be more agile

than the established industrialized nations, some upper-middle-income countries, such as the Baltic states, have already built out more advanced ICT technologies than their larger neighbors—and thus can benefit from more efficient T&T sales channels.

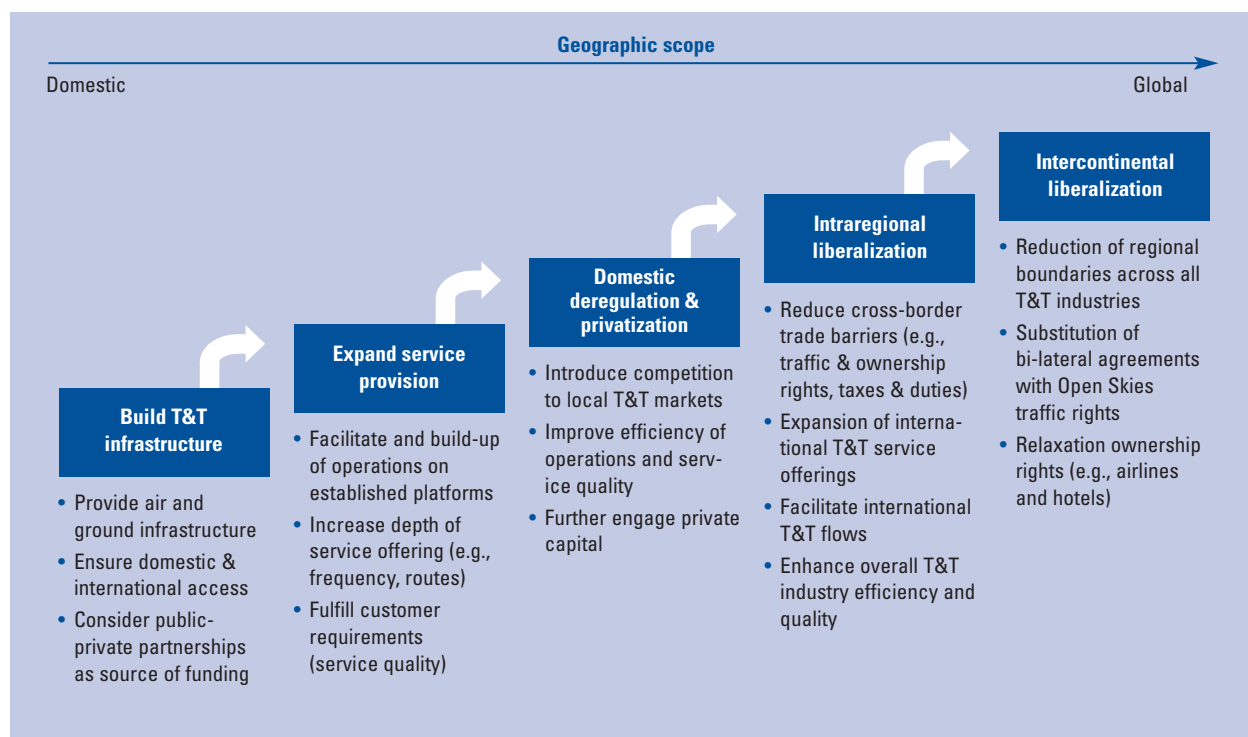
Upper-middle-income countries should focus on making sure they have enough leeway in their national strategies, policies, and budgets for T&T development, leveraging this sector as an additional source of income and as an accelerator for the exchange of people, knowledge, and money—within their national boundaries, between their regional neighbors, and around the world.

**Lower-middle-income and low-income economies.** These countries should pay the closest attention to the build-up of their T&T sectors, since they will reap the best return-on-investment from such efforts. Because these countries usually have limited sources of income and access to foreign capital, they may have only partially started to invest in industry and trade. In such cases, investment in Travel & Tourism is an ideal incubator for their national economy, contributing to overall development in four ways:

- Money raised through the T&T sector can be invested in other sectors.
- Necessary upgrades to Travel & Tourism are also beneficial for their own citizens and domestic business environment.
- Domestic workforce working in the T&T sector will further develop their skills and can act as role models for advanced education for all citizens.
- Growth in the T&T industry will have spillover effects in other markets—by attracting foreign investors, for example.

These effects also underline the priorities for national governments: build attractive resorts and business centers, train people, and bring transportation infrastructure up to international standards. Strong property rights, reliable health care, and adequate security standards will be required to attract investors as well as travelers.

Globalization is forcing every country—large or small, rich or poor—to compete with one another for the benefits of strong business Travel & Tourism. That means governments need to create an environment that best prepares their economies for the opportunities arising of the T&T sector. In an era where business travelers and tourists alike have many choices for travel and investment, every country—but especially lower middle income and upper middle income countries—must strengthen their T&T sectors rapidly and intelligently, addressing the real needs of their domestic economies while taking into account the actions of their regional neighbors.

**Figure 13: Steps toward a competitive T&T industry**

Source: Booz Allen Hamilton.

### How to realize the opportunity: Steps toward improving T&T competitiveness

Successfully building a highly competitive T&T sector requires several evolutionary steps (see Figure 13). Governments must first make sure the appropriate infrastructure capacity is in place to provide access for domestic and international travelers; preferably by leveraging private capital early in the process through such strategies as public-private partnerships. And both public regulators and private investors need to ensure that they jointly manage such partnerships efficiently, by focusing on the demand characteristics of their markets.

Once infrastructure is in place, governments should focus to ensure that market demand is fully met—both in terms of service quality and quantity (for example, routes and level of frequency served). To increase performance efficiency of the T&T sector, governments should engage in deregulation and privatization, providing a platform for further demand stimulation and growth. Following domestic deregulation, a cross-border liberalization of a whole region's policy framework, such as Europe's Open Skies agreement, can effectively attract new market entrants and improve the industry's overall performance. That in turn can drive down both prices and costs while stimulating service quality and demand across all T&T players within the region.

The last step, a full intercontinental—or even global—liberalization of travel regulations has not yet been reached, but given what the global T&T sector has achieved over the past two decades and what is currently underway (for example, the Open Skies agreement

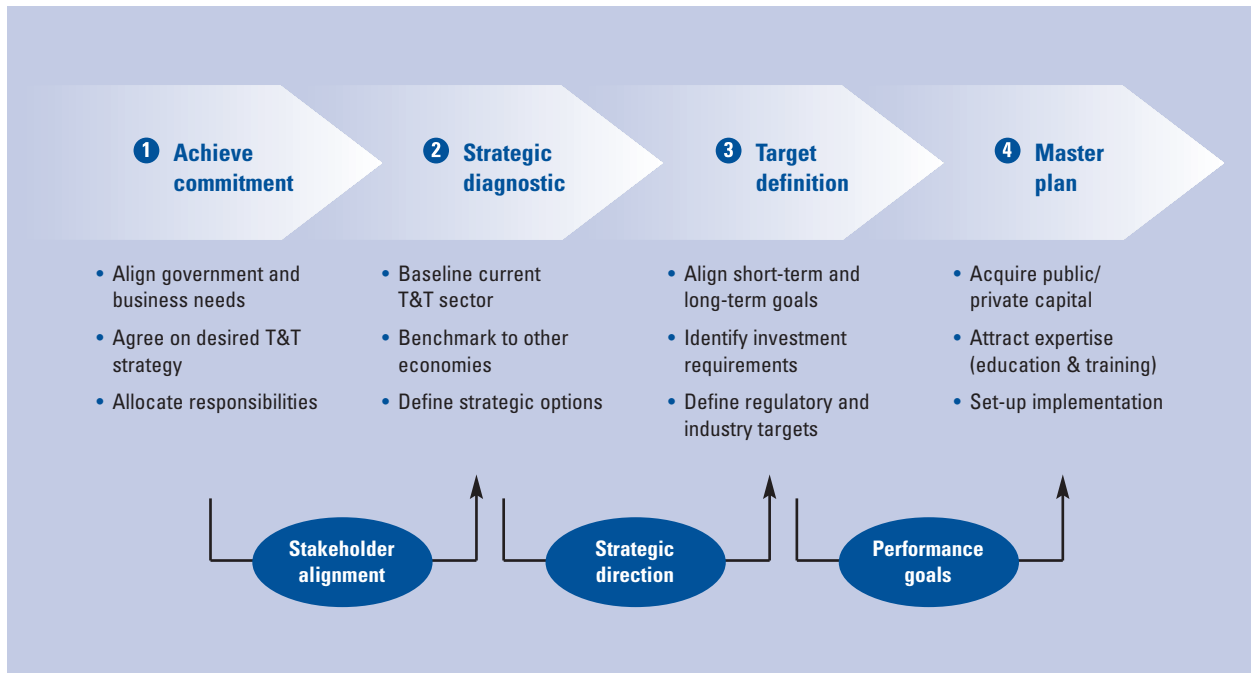
between Europe and North America), even this vision may become reality in the years to come.

The positive correlation between a healthy T&T sector and the wealth of individual nations, along with the examples of countries and economies that have successfully leveraged that correlation, provide a clear indication that governments can influence the competitiveness of their T&T sectors and their impact on overall GDP and welfare. Any government that wants to start the evolutionary process to improve its T&T sector competitiveness needs to shape its political agenda accordingly, aligning both public and private interests, evaluating its current situation, initiating relevant measures and targets, and applying lessons learned from the strongest of their peer economies (see Figure 14).

**Achieve commitment.** Before governmental bodies and business leaders can agree on the steps required to boost their T&T sector, they must agree on just how beneficial the further development of the T&T sector can be for their country's welfare. Once they choose a direction to pursue, it must be followed tenaciously, since only persistent action will bring about real progress.

Commitment on the part of a country's public and private stakeholders is the first step, but aligning closely with neighboring governments and business leaders are just as necessary for all the stakeholders to understand the full picture of a country's strategic options. Economies with close regional ties must set their strategic agendas jointly in order to define an aligned approach to the successful development of an efficient and effective T&T system. That alignment can also help



**Figure 14: Action steps toward unleashing the T&T sector's potential**

Source: Booz Allen Hamilton.

mitigate cross-border risks, such as the possibility of investing in ground infrastructure with overlapping catchment areas. (This risk was highlighted for the Middle East in a Booz Allen Hamilton study, “Mastering the Challenges of the Middle East Aviation System,” that was developed as a result of a 2006 World Economic Forum meeting in Sharm-el-Sheikh.)

**Strategic diagnostic.** Developing a workable plan requires a thorough understanding of the current state of a country’s and region’s T&T industry. This baseline approach involves not only the evaluation of the sector’s current competitiveness but also a gap analysis that compares its own performance, on both the regulatory and the business side, with comparable “best practice” countries. The strategic assessment must include a sound analytical foundation, and the TTCI should serve as a first indicator. The critical factors described in this study must be carefully screened and, if appropriate, adapted to the country’s specific social, economic, and regulatory environment. The results of the baselining and benchmarking analysis can then set the overall strategic direction that both private and public stakeholders will pursue, and can serve as a solid basis for defining the required operational targets going forward.

**Target definition.** Once all the stakeholders agree on an overall strategic plan, the tradeoffs between short-term expenses and long-term benefits must be clearly evaluated, and a target for a satisfactory return on investment determined. These targets need to be translated into sound and realistic planning. Governments must compare the targets with their plans for T&T

infrastructure, support services, and sector capabilities, and then identify the gaps. As they do so, they need to review their regulatory policies and evaluate the size of the infrastructure investments required, as well as any additional budget needed for new services and education of travel professionals. The resulting performance goals will set the stage for the subsequent master plan.

**Master plan.** The most critical prerequisite for an efficient T&T master plan is the liberalization of the transportation sector as well as of financial markets. Domestic as well as international air and ground travel should be opened to competition, including, ideally, competition from other countries. Investors in the sector should be able to own capital equipment, real estate, and the companies that provide travel services (if only in the form of public-private partnerships). In considering how state-owned infrastructure is to be shared, nondiscrimination clauses need to be enforced to ensure fair and efficient competition between former incumbents and new entrants into the market.

The master plan should focus on several major elements to enable the improvement of the T&T sector’s competitiveness, including:

- accelerating the national deregulation plans of major transportation markets, while taking into account spillover effects with neighboring regions;
- reducing subsidies and public investments by limiting them to critical areas where private investors are not yet willing to take on the full business risk; and



- improving safety and security, especially along major travel routes and business centers.

The master plan must also align T&T policies with a broader agenda of national economic growth, including a coherent roadmap for air and ground travel that builds on realistic projections of future traffic growth. And the plan needs to include a comprehensive education and training agenda for the national T&T sector, which may involve turning to international service partners to help kick-start the transformation.

Creating a coherent long-term plan for the T&T market and its needed capacities is essential. A plan will strengthen the positive elements of national transformation programs, such as employment benefits and strengthened privatized national companies, and it will prevent potential overinvestment in misplaced infrastructure.

To succeed along those steps, governments must define a clear vision and a commitment to engage all stakeholders in the process, and they must make a determined effort to work together hand-in-hand with the private T&T sector.

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## Using Policy Measures and Economics to Improve Travel & Tourism-Related Policy and Business Decision Making

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The World Economic Forum is launching in this *Report* the first Travel & Tourism Competitiveness Index (TTCI). The objective of the present chapter is to analyze the implications of the results of the TTCI from a policy-making perspective and to describe our initial thoughts on how the index might be used by the industry to engage in an active dialogue with the public sector so as to generate concrete actions in those economies of interest.

In order to set the stage for this dialogue, this paper first provides a brief overview of the mission of the World Travel & Tourism Council (WTTC) to raise awareness of Travel & Tourism's contribution and the economic research called *Tourism Satellite Accounting* that it has produced for the past 16 years to assist policy and business leaders in their decision-making processes. It also describes WTTC's efforts to create a policy vision for Travel & Tourism (T&T), as well as the two approaches—qualitative and quantitative—it has taken to measure performance against this vision.

The paper then presents some of WTTC's initial thoughts about how the public sector of a country should interpret and react to the TTCI's results in order to improve its country's T&T competitiveness.

Finally, this paper presents an innovative analysis of the results of the TTCI, which is designed to assist business leaders to understand how countries' TTCI findings correlate to the basic question of risk versus return. Our aim is to assist policy leaders to understand how their countries are perceived in this regard and thereby help them plan their strategy for decreasing risk or increasing return, thus making investment in their economy more attractive.

### The World Travel & Tourism Council

When the World Travel & Tourism Council (WTTC) was established in 1989, the founding members of this private sector industry association decided that the quantification of Travel & Tourism's impact on world and national economies would be the most important contribution they could make toward their goal of raising awareness among policy leaders and decision-makers of the sector's economic contribution and its potential for creating wealth and employment around the world. The subsequent 16 years of investment in solid, professional, and credible research—which to date has exceeded US\$5.0 million and is now sponsored by Accenture, a global management consulting, technology services and outsourcing company—made a significant contribution to the development of the new international standard for Tourism Satellite Accounting (TSA) research, adopted in 2001 by the United Nations Statistical Commission.

### Tourism Satellite Accounting

Over the years, WTTC and its research partner, UK-based Oxford Economic Forecasting (OEF), have endeavored to create a pioneering system of Tourism Satellite Accounting research, which now covers 174 economies around the world. Using the most sophisticated combination of macroeconomic research and forecasts, national accounting data and information, and T&T variables and econometric modeling, WTTC/OEF have produced a comprehensive and universal system of research covering all concepts of T&T “demand”—from personal consumption and business purchases to capital investment, government spending, and exports. This information is then translated into economic concepts of production, such as gross domestic product (GDP) and employment, which can be compared with those of other industries and the economy as a whole to provide credible statistical information that will assist in policy making and business decision-making.

Over the past 16 years, WTTC has endeavored to produce the most comprehensive TSA provided for within the UNWTO conceptual framework—by developing the narrow concept of the *T&T industry* in addition to the broader concept of the *T&T economy*—and in so doing, has generated a number of benefits available to government and industry worldwide.

Full implementation of a TSA can help governments understand:

- the economic dynamics of tourism well beyond the traditional scope of expenditure research and production by the travel service sector;
- the relationship between tourism and the crucially important durables sector of the economy;
- the relationship between tourism and government spending, thus helping establish a clear link between tourism results and tourism support;
- the balance of payments arising from the comprehensive flow of tourism goods and services necessary to make tourism possible and, in the process, discover hidden trade surpluses or deficits;
- the relationship between tourism and capital investment to assist in long-term planning for infrastructure, resort development, promotion, and so on;
- the difference between the immediate impact of tourism industry GDP and employment and the broader impact of tourism economy GDP and employment, which can facilitate policy analysis and decision-making; and

- the interplay between a tangible, but unsatisfactory, supply-side perspective of employment generated by characteristic activities and the more theoretical, but accurate, perspective of demand-side generated employment.

Full implementation of the a TSA can help industry understand:

- a wealth of customer and consumer information on tourism-related purchases (domestic and international, imported or exported goods, services, durables or nondurables, and purchases made before, during, and after a trip) that has never before been available;
- the full tourism product service chain and government’s ability to deliver quality and timely service to visitors;
- the history and forecast for public works that have benefited or will benefit visitors and travel companies in order to capitalize on public sector intentions and priorities for growth;
- the opportunities for domestic production and for negotiating incentives from the public sector to aid in the growth of businesses, which help alleviate trade balance issues; and
- the critical dual-perspective employment information that will allow industry to plan their human resource requirements and develop new and innovative ways to attract, retain, and grow their workforce.

There is little doubt that WTTC’s Satellite Accounting Research program has made a major contribution to ensuring that Travel & Tourism is today increasingly considered an industry that fully justifies mainstream economic and policy consideration. It has also enabled the industry to initiate a broader and more in-depth dialogue with government about how Travel & Tourism can be used as an economic development tool.

Tables 1 through 4 present data about the dramatic effect of Travel & Tourism on specific economies.

**Table 1: Travel & Tourism demand (2006)**

| Rank | Economy        | US\$ (millions) |
|------|----------------|-----------------|
| 1    | United States  | 1,652,646.0     |
| 2    | Japan          | 522,894.9       |
| 3    | Germany        | 412,607.5       |
| 4    | China          | 353,672.6       |
| 5    | France         | 336,535.4       |
| 6    | United Kingdom | 328,298.6       |
| 7    | Spain          | 251,972.5       |
| 8    | Italy          | 246,927.3       |
| 9    | Canada         | 189,082.4       |
| 10   | Mexico         | 140,450.0       |

Source: WTTC.

**Table 2: Travel & Tourism industry GDP (2006)**

| Rank | Economy                | Total GDP (%) |
|------|------------------------|---------------|
| 1    | Macau                  | 34.8          |
| 2    | Maldives               | 34.2          |
| 3    | Seychelles             | 29.2          |
| 4    | Anguilla               | 25.3          |
| 5    | Antigua and Barbuda    | 24.3          |
| 6    | Aruba                  | 23.0          |
| 7    | British Virgin Islands | 22.9          |
| 8    | Vanuatu                | 19.9          |
| 9    | Saint Lucia            | 18.7          |
| 10   | Bahamas                | 16.8          |

Source: WTTC.

**Table 3: Travel & Tourism industry employment (2006)**

| Rank | Country       | Jobs (thousands) |
|------|---------------|------------------|
| 1    | China         | 17,383.2         |
| 2    | India         | 10,679.6         |
| 3    | United States | 5,834.3          |
| 4    | Japan         | 2,683.8          |
| 5    | Indonesia     | 2,579.3          |
| 6    | Brazil        | 2,336.7          |
| 7    | Thailand      | 1,842.3          |
| 8    | Mexico        | 1,566.0          |
| 9    | Spain         | 1,472.8          |
| 10   | France        | 1,392.3          |

Source: WTTC.

**Table 4: Travel & Tourism demand (2007–16)**

| Rank | Economy    | Annualized real growth (%) |
|------|------------|----------------------------|
| 1    | Montenegro | 10.2                       |
| 2    | China      | 8.7                        |
| 3    | India      | 8.0                        |
| 4    | Romania    | 7.9                        |
| 5    | Croatia    | 7.6                        |
| 6    | Vietnam    | 7.5                        |
| 7    | Latvia     | 7.3                        |
| 8    | Maldives   | 7.2                        |
| 9    | Albania    | 7.0                        |
| 10   | Cambodia   | 7.0                        |

Source: WTTC.

**WTTC's *Blueprint for New Tourism***

From a global strategic perspective, the critical policy issues concerning T&T growth are encapsulated in WTTC's *Blueprint for New Tourism*, a contemporary and historic call to action involving a coherent partnership between all stakeholders—both public and private—to strengthen industry efforts and turn future challenges into opportunities.

The *Blueprint for New Tourism*, which resulted from WTTC's Global Travel & Tourism Summit in the spring of 2002, is the latest version of the industry's policy vision following WTTC's Millennium Vision and its Seven Strategic Priorities. It provides a new strategic framework for ensuring that Travel & Tourism works for all stakeholders in the future.

In short, "New Tourism" is a new sense of coherent partnership between the private sector and public authorities. It is geared to delivering commercially successful products—but in a way that ensures benefits for everyone. New Tourism looks beyond short-term considerations. It focuses on benefits not only for those who travel, but also for the local communities they visit and for their respective natural, social, and cultural environments.

New Tourism is also a new vision—of Travel & Tourism as a partnership, delivering consistent results that match the needs of economies, local and regional authorities, and local communities with those of business, based on:

1. governments recognizing Travel & Tourism as a top priority;
2. business balancing economics with people, culture, and environment; and
3. a shared pursuit of long-term growth and prosperity.

**Governments recognizing Travel & Tourism as a top priority**

New Tourism depends on governments recognizing Travel & Tourism's valuable flow-through effects for all sectors of the economy and across the whole population—and having the sense of leadership to act on that recognition. Leadership at the highest levels of government should factor Travel & Tourism into all policies and decision-making; should coordinate all strategies that have an impact on, or are impacted by, Travel & Tourism; and should reorganize structures and funding so as to ensure effective planning and management. The most effective policy responses are those that encompass key government responsibilities, such as coordinating infrastructure development and fostering competitiveness, rather than focusing on short-term protectionism or micro-intervention in market mechanisms.

The benefits, which can be enjoyed by every economy that adopts measures to help deliver on the promise, include:

- long-term tourism planning at national and regional/local levels;
- the creation of a competitive business environment that avoids inflationary taxation, guarantees transparency, and offers more attractive corporate ownership rules;
- the assurance that quality statistics and information feed into policy and decision-making processes;
- the inclusion of new professionalism, funding, and coordination in promotion and marketing, employment and training needs, infrastructure, and regional and local policy;
- the development of the human capital required for T&T growth. Governments should lead investment in human resources—through education and by bridging the gap between authorities and the industry—to help plan ahead for future needs. An online and easily accessible market monitoring network could link reliable tourism market information with data on employment;
- the liberalization of trade, transport, and communications and the easing of barriers to travel and to investment;
- the building of confidence for customers and investors on safety and security;
- the promotion of product diversification that spreads demand;
- sustainable tourism expansion in keeping with cultures and character; and
- investment in technological advances, such as satellite navigation systems, to facilitate safe and efficient T&T development.

This is the agenda that makes it possible to explore and support the opportunities in the broadest spectrum of T&T businesses. It will not only develop product range and quality, but also ensure that the patterns of tourism flow respect the natural and built heritage as well as local interests.

#### Business balancing economics with people, culture, and environment

New Tourism requires the T&T industry to achieve the right balance between business imperatives and the wider needs of local communities in terms of quality of life. Private sector growth can be deployed as a driver

of sustainable development and as a contributor to the dignity of the people and cultures it touches.

Internally, the sector must adjust business planning, product, and service quality, and adopt policies that respect the interests of the people for and with whom it works. Externally, it must systematically embrace opportunities to spread its benefits—from helping to kick-start developing economies into conserving the environment to transferring skills and promoting the dignity of people in local communities.

Many of New Tourism's key tasks for the private sector are very concrete. They comprise:

- expanding markets, while promoting and protecting natural resources and local heritage and lifestyles;
- developing careers, education, and employee relations;
- promoting small firms;
- raising the environmental awareness, and helping to narrow the gap between the “haves” and the “have-nots”;
- ensuring a range of tourism products that helps diversify a country's tourism product mix so as to reduce seasonality and increase yields;
- improving the quality of tourism products and services, and adding value for money while increasing consumer choice;
- agreeing and implementing quality standards at all levels and in all areas, including staff training;
- transferring industry skills and best practice that spread the benefits of Travel & Tourism widely and efficiently;
- ensuring increasingly sophisticated and more precise measurement of the sector's own activity, to feed into strategic business decisions; and
- communicating more effectively with the world in which it operates—for example, including energetic input from T&T umbrella organizations to government, at strategic and local levels.

The cumulative effect will be a shift toward Travel & Tourism that continues to serve the private sector's own needs while embracing the wider interests of the countries and communities in which it operates.

#### A shared pursuit of long-term growth and prosperity

New Tourism needs new joint strategies, using new mechanisms springing from new partnerships with public authorities. Industry's recognition of its broader responsibilities has to be matched by that of government, and both sides must be prepared to adopt a new



form of long-term thinking—and a new degree of openness and cooperation—to develop contingency planning as well as development strategies. Specific tasks that can be successfully undertaken by the widest cooperation include:

- allying best practice in tourism development with policies on regional affairs, transport, human resources, the environment, infrastructure, and rural development;
- promoting public-private sector partnership in the joint preparation of sustainable master plans for the development of entire destinations or holiday regions—a task that is too demanding for a single company or state authority to undertake on its own;
- creating locally driven processes for continuous stakeholder consultation, involvement and benefit;
- restructuring national tourism organizations (NTOs) as public-private sector partnerships;
- averting the dangers of excessive, unplanned development, and setting environmental policy goals that can realistically be met;
- developing human resources and the deploying skills through planning and legislation that avoids limits based on residence or other requirements;
- collaborating on information requirements for public sector analysis and policy formation;
- promoting joint efforts to improve security, with private sector mechanisms complemented by action from public authorities; and
- developing confidence among all stakeholders that efforts are mutually reinforcing.

New Tourism offers the prize of economic activity that enhances quality of life as well as new opportunities for self-sufficiency and local prosperity. This prize can be won by all economies that rise to the challenge of integrating the needs of the T&T industry with national policies.

### Travel & Tourism policy assessment

In recent years, the assessment of an economy's performance vis-à-vis the strategic vision of WTTC's *Blueprint for New Tourism*, or even more specific T&T policy objectives, has been limited to a qualitative assessment conducted by experienced travel industry analysts.

In producing its well-known and highly sought after Country Reports, WTTC has complemented the TSA research with a detailed analysis of each country or

economy's performance against the vision of its *Blueprint for New Tourism*. This is a time-consuming exercise that involves months of desk research and numerous interviews and focus group sessions with local industry officials, business leaders, consultants, academics, experts, and the media. Nevertheless, the analysis of what is working and what is not working in each economy is a function of perspective and experience and, since no two economies or analysts are exactly alike, it is difficult—if not impossible—to provide a meaningful comparative analysis of one economy's policy situation versus another's.

### WTTC's Competitiveness Monitor

It is because of the difficulty of providing a truly comparative analysis that, in 2001, WTTC undertook a pioneering effort at the request of its former chairman, Harvey Golub (who is also past chairman and CEO of American Express) to develop a competitiveness index similar in nature to that produced by the World Economic Forum to rank global competitiveness.

WTTC's Competitiveness Monitor tracked a wide range of information that indicated to what extent a country offers a competitive environment for T&T development. Produced for three years, the Monitor was researched and compiled in partnership with the Christel DeHaan Tourism and Travel Research Institute at the University of Nottingham.

The Monitor's aim was to stimulate policy-makers, industry investors, academics, and other interested parties to recognize the crucial role they play in maximizing the contribution of Travel & Tourism for the benefit of all stakeholders, and to ensure that the development of the industry is sustainable.

The Competitiveness Monitor offered an analytical framework that:

- provided an ongoing record of policy indicators and developments that have an impact on Travel & Tourism;
- compared national performance statistics, policies, and agreements;
- indicated, when combined with TSA research, the effectiveness of national policies to attract foreign direct investment and tourism expenditure in a globally competitive market; and
- highlighted the importance of long-term planning and the need to factor Travel & Tourism into all government policy developments and decisions.

Like the new Travel & Tourism Competitiveness Index, the WTTC Competitiveness Monitor was based on a set of social and economic data that were available and comparable across all countries. The data were compiled using a series of indexes that comprise eight subindexes



calibrated to allow across-the-board comparisons in the follow groupings:

- **Price:** This subindex measured the relative cost of travel to the countries, using room rates, purchasing power parity, and taxes on goods and services.
- **Human Tourism:** This subindex measured the achievement of human development in terms of tourism activity. It was a new index in line with various kinds of human development indexes constructed by the United Nations Development Programme (UNDP) to measure human achievement in various aspects of human development.
- **Infrastructure:** This subindex measured the level of infrastructure development such as road infrastructure, sanitation facilities, and access to improved drinking water.
- **Environment:** This subindex measured population density, CO<sub>2</sub> emissions, and the ratification of environmental treaties.
- **Technology:** This subindex measured telephone and Internet access, high-technology exports, and the use of mobile phones.
- **Human Resources:** This subindex measured life expectancy, adult literacy, and combined primary/secondary/tertiary enrollment rates.
- **Openness:** This subindex measured a country's openness toward international trade and visitors through visa requirements, TSA import/export results, and taxes on international trade.
- **Social:** This subindex measured the level of a country's human development through access to daily newspapers, personal computers, and television, as well as overall crime.

The WTTC Monitor used a “traffic light” system to indicate relative positions rather than the absolute performance of different countries. Green, amber, and red lights indicated above-average, average, and below-average performance respectively.

After three years of development and production, the WTTC Competitiveness Monitor, although well received and used by the international community, was thought to be limited by lack of access to specific policy implementation/success measures. As a result, following discussions with the World Economic Forum, it was decided that joining efforts and working with a more established policy monitoring organization, which has access to even greater policy metrics and a broader executive network, would be beneficial to the Monitor. Thus, WTTC has now joined forces with the Forum to collaborate on, and contribute to, this new TTCI. This new Index should make great strides toward allowing

government and industry to assess the potential for Travel & Tourism throughout the world. The ultimate purpose of this paper is to open the discussions on how the new TTCI can be used both by governments—to understand their policy positions and work to improve their positioning in order to develop their T&T activities and attract investment in the sector; and by industry—to prioritize their business activities, direct new investments, and focus their necessary government affairs' efforts.

### The Travel & Tourism Competitiveness index

The TTCI, by its nature and design, is simple to understand and to use. As a result, it is a beautiful tool that allows economies, and governments in particular, to understand how their tourism performance is perceived.

#### Simple is beautiful

Although it will be extremely tempting for each country or economy to review the Index and immediately claim success or failure based on where they fall within the rankings, this would be premature and might, in fact, be a matter of jumping to an unwarranted conclusion. Instead, the more appropriate measure will be how each economy, regardless of its ranking, moves forward over time. Of course, for those economies that are ranked lower on the list, competitive pressures will create conditions that encourage them to move higher up the list. But, in reality, it is not the ranking that counts. What matters is how the actual score improves—or not—over time.

The most obvious example to illustrate this erroneous notion is the rare situation in which each country improves its score by exactly the same amount from one time period to another. In this case, the policy situation for Travel & Tourism will improve for each country and for the industry worldwide but, at the same time, the ranking for all countries will stay the same. Thus, any focus on ranking alone would be very unwise.

#### Quantitative vs. qualitative

It will also be tempting for countries to raise their scores and/or rankings by specifically targeting those quantitative elements of the Index that can easily be affected by narrow or specifically focused public policy changes, adjustments to regulation, and increased spending or investment. Again, although this approach would seem to be natural and appropriate—after all, the Index does include a number of very specific quantifiable performance measurement items—such an approach merely scratches the surface of what the Index covers. This is because the qualitative aspects as measured by the Forum's Executive Opinion Survey are perhaps even more important, and these do not lend themselves to direct targeting by a specific activity.

Therefore, in order realistically to affect the score and/or ranking of the TTCI, countries will be obliged to tackle the areas of assessment from a full policy perspective. As an example, in order to increase the quality of road infrastructure, countries will need not only to address roadway hardware, but also the administration of roadway construction, safety and security, and maintenance. Without a 360-degree perspective, the qualitative assessment will not enjoy the full benefits that a limited policy approach or activity targeting would provide.

### Reality vs. perception

Some countries may, nevertheless, still believe, in some circumstances, that the Index is not reporting the reality of a situation—that is, that it is a matter of perception rather than reality, and that a publicity campaign—not a change of policy—is all that is needed. Although this situation is indeed conceivable, it is our strong belief that countries facing this situation should focus on clear communication of facts rather than waging a publicity campaign to win hearts and minds. Clearly articulated facts that discuss and explain the current state of affairs in any one of the Index's areas of coverage will have much greater impact on, and contribute much more significantly to, changing perceptions than well-crafted publicity campaigns would have.

Furthermore, the simple exercise of articulating the facts may even help the country to understand why and how a false perception has developed, and to establish a mechanism to correct or prevent the false perception from re-occurring in the future.

### Industry and the TTCI

Like most government reaction, industry reaction to the TTCI is likely to start with a review and an examination of the individual and aggregate rankings for those countries in which the company or enterprise is currently operating. For organizations with businesses in countries with lower scores and ranks, business leaders will clearly want to know:

- if the score/ranking is valid, consistent with internal management understanding and/or perceptions, and whether this score/ranking has been taken into consideration by the business in terms of its strategy and/or operations;
- whether there are plans by the government, now or in the near future, to address the weaknesses or challenges identified by the score/ranking;
- what, if anything, the individual business or industry in aggregate must do to assist or encourage the public sector to take action to address the weakness/challenges;

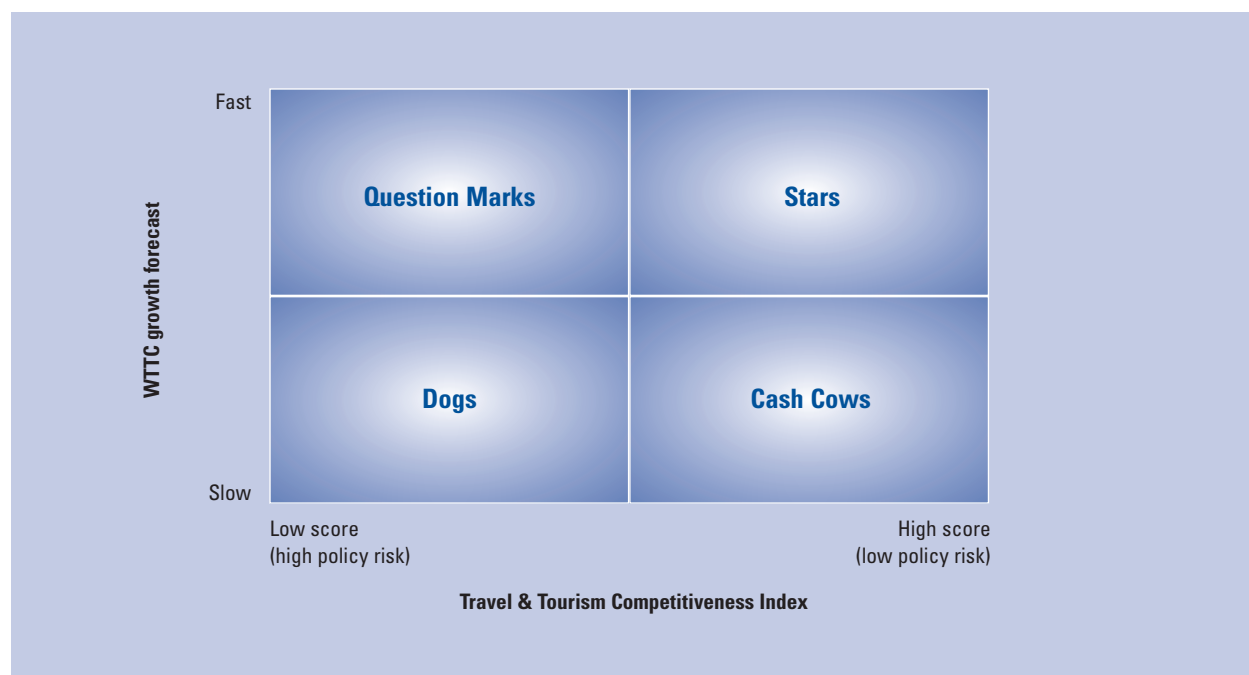
- based on the existing situation, what the risk/return tradeoff is—both for the specific organization and industry in general; and
- whether it is necessary to develop an exit strategy if the risk/return tradeoff is insufficient or there are no plans and efforts by the public sector to address the challenges/weaknesses, or if these plans and efforts are unsuccessful.

In order to understand and clearly define the risk/return tradeoff, WTTC has created an additional and innovative analysis by combining the TTCI with the TSA outlook for growth. To undertake this analysis, we have used the concept of the Growth-Share Matrix developed by the Boston Consulting Group (BCG). This matrix has been used by businesses around the world to assess their business units or product lines, and to best allocate their resources. However, instead of using relative market share as the x-axis variable, WTTC has used the new TTCI to help construct a growth-policy risk matrix, which can be used by businesses to assess the allocation of their resources on an international basis.

In translating the BCG matrix to a growth-policy risk matrix, it is still possible to classify the results in a similar manner (Cash Cows, Dogs, Question Marks, Stars—see Figure 1). The following language has been taken from [www.wikipedia.org](http://www.wikipedia.org) and the terminology has been adjusted to suit this new matrix.

**Cash Cows** are countries with a high TTCI score—that is, a low policy risk—and a slow-growing T&T economy. Companies or enterprises in these countries typically generate a return in excess of the amount of risk incurred by operating in this country. The T&T economy in these countries is regarded as staid and boring—that is, it is a “mature” T&T economy—and every company and enterprise would be thrilled to operate in as many Cash Cow countries as possible. Enterprises in these countries can be “milked” continuously with as little investment as possible, since such investment would be wasted in a country with low growth. Countries that find themselves in this group should be satisfied with their policy situation but unsatisfied with their outlook for growth, and should focus their attention on incentives that will encourage investment. Cash Cow countries should aspire to be Stars.

**Dogs** are countries with low TTCI scores—that is, high policy risk—and a mature, slow-growing T&T economy. T&T enterprises in these countries typically break even, although they generate barely enough return to maintain the risk/return ratio. Although operating in a break-even country provides the social benefit of providing jobs and possible synergies that assist enterprises in other countries, such an enterprise is worthless from the point of view of risk, as it does not generate sufficient return for the company. Operations in these countries depress a profitable company's return-on-assets

**Figure 1: Travel & Tourism growth-policy risk matrix**

ratio, used by many investors to judge how well a company is being managed. Enterprises in a Dog country, it is thought, should be sold off. Countries that find themselves in this group should be worried about both their policy situation and their outlook for growth; in most cases, they will find that it is the poor policy situation that is causing the poor growth situation. Countries in this group should prioritize their work by focusing on those policy issues with the greatest return on investment—that is, they should start with those issues for which small or quick fixes will result in large or fast returns. Dog countries should aspire to be Question Marks or Cash Cows.

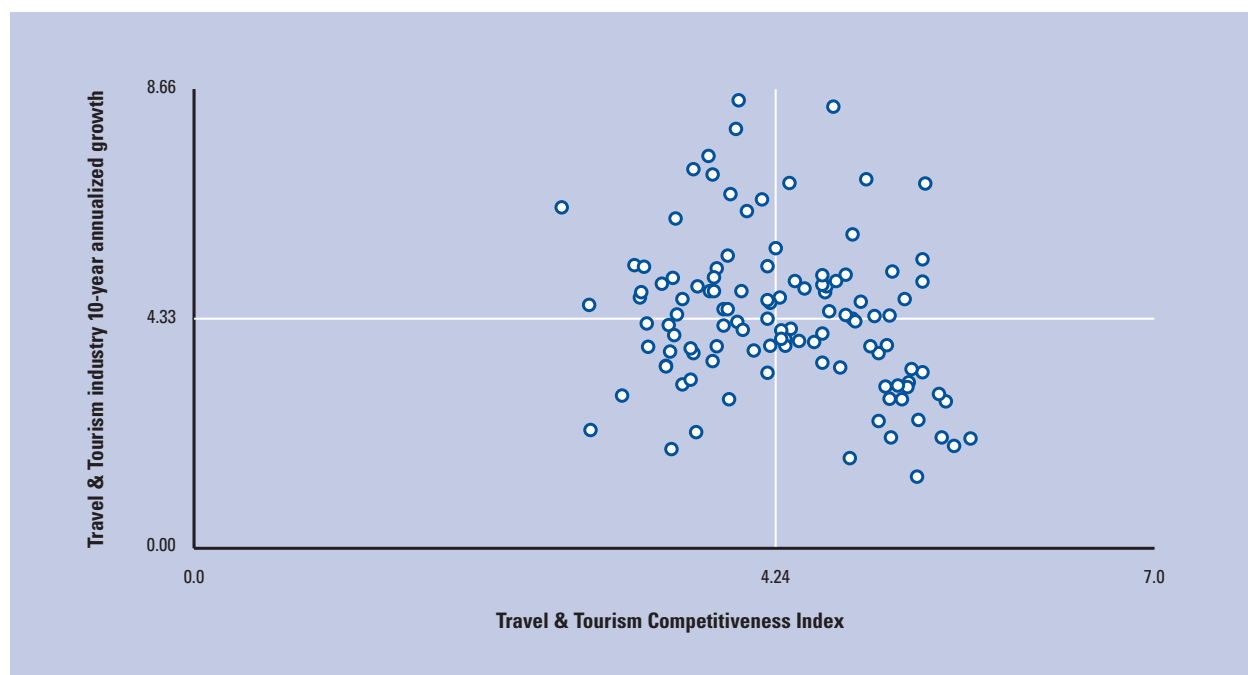
**Question Marks**, aka *problem children*, are countries with low TTCI scores (thus a high policy risk) in a fast-growing T&T economy. Such countries require large amounts of investment and policy attention to better their TTCI scores (that is, to decrease their policy risk). The national goal must be to decrease the policy risk to become a Star. Otherwise, when the country matures and growth slows, the country will fall down into the Dog category. Like Dogs, the countries in this group run the risk of losing T&T enterprises to countries in which the policy risk is lower, so efforts should be made by the public sector to reduce the risk in a return-on-investment approach similar to the one described in the Dogs' category. Question Mark countries should aspire to be Stars.

**Stars** are countries with a high TTCI score (low policy risk) in a fast-growing T&T economy. The hope—from an enterprise perspective—is that Stars

become the next Cash Cows. Sustaining the country's policy leadership may require extra attention, but this is worthwhile if that is what it takes for the country to remain a leader. When growth slows, Stars become Cash Cows if they have been able to maintain their policy leadership, or they move from brief "Stardom" to "Dogdom." For countries in this group, the challenge is to maintain their high level of growth. This requires significant attention to the details and to working with the private sector to understand their needs, and then to translate this information into policy initiatives that will keep them ahead of the curve.

In attempting to take this analogy to its logical conclusion and avoid some of the criticisms that can be applied to the original BCG matrix, it should be noted that the intention in using this matrix is not to suggest that enterprises need to have a balance of businesses across all four quadrants. Rather, as stated in *Wikipedia*:

The reality is that it is only the Cash Cows that are really important [for the private sector]—all the other elements are supporting actors. It is a foolish vendor [or, in our case, enterprise] who diverts funds from a Cash Cow when these are needed to extend the life of that "product" [or activity]. Although it is necessary to recognize a Dog [country] when it appears (at least before it bites you), it would be foolish in the extreme to create one [or operate in one] in order to balance up the picture. The vendor [or enterprise], who has most of his (or her) products in the Cash Cow quadrant, should consider himself (or herself) fortunate indeed, and an excellent marketer [or

**Figure 2: Travel & Tourism growth-competitiveness matrix**

Source: World Economic Forum and WTTC.

business operator], although he or she might also consider creating [operating in] a few Stars as an insurance policy against unexpected future developments and, perhaps, to add some extra growth.

From an enterprise perspective, this analysis is all about balancing risk and return. If the return is high enough, operating in a risky policy environment is acceptable. On the other hand, if the return is not high enough, the enterprise will at some point seek out other opportunities.

From a country perspective, it is not really about risk and return because it is not possible to diversify or move its place of operation the way it is in the private sector. Instead, countries have only one place of operation in the matrix; their ultimate objective is to achieve the highest return on their investment. Investment in this context is not monetary, but rather a matter of policy. Normally, Dogs aspire to be Question Marks or Cash Cows. Cash Cows aspire to be Stars. Question Marks aspire to be Stars, and Stars aspire to stay Stars. For some countries, it is simply not possible to achieve a high level of T&T growth because the macroeconomy is already mature and developed, so Cash Cow is the best they can do. However, for developing countries that still have the possibility of high rates of growth, achieving Star status is still the ultimate objective.

Although we expect there will be a number of different ways in which the industry will assess the results of the TTCI and try to use them for their own strategy or planning purposes, this growth-policy risk

matrix will provide an intuitive and interesting method for putting them into perspective. It will also allow the industry to begin addressing how it wishes to proceed in terms of current operations and possible future investment, while allowing the countries to begin figuring out what they want their futures to look like.

Figure 2 and Tables 5, 6, 7, and 8 illustrate the T&T growth-policy risk matrix described above and lists those countries or economies that fall into each of the four quadrants. It should be noted that the delineation between low growth/high growth and low score/high score in the TTCI has been illustrated using median values for each. Because there is no hard-and-fast rule about where to draw the line, caution should be exercised when categorizing these results. The tables show the data of only those economies for which both TTCI data and growth data are available. A handful of economies covered in the TTCI are therefore not shown.

Based on this analysis, the economies covered by research of both the Forum and WTTC can be categorized as Stars, Question Marks, Cash Cows, and Dogs (see Tables 5, 6, 7, and 8, respectively).

**Table 5: Stars in the Travel & Tourism growth-policy risk matrix**

| Country/economy      | TTCI score | WTTC T&T projected economic growth (2007–16, annualized) |
|----------------------|------------|----------------------------------------------------------|
| Bahrain              | 4.45       | 4.90                                                     |
| Barbados             | 4.86       | 4.65                                                     |
| Costa Rica           | 4.60       | 4.83                                                     |
| Croatia              | 4.66       | 8.33                                                     |
| Cyprus               | 5.07       | 4.39                                                     |
| Czech Republic       | 4.75       | 5.16                                                     |
| Egypt                | 4.24       | 5.66                                                     |
| Estonia              | 4.90       | 6.96                                                     |
| Hong Kong SAR        | 5.33       | 6.88                                                     |
| Hungary              | 4.61       | 4.94                                                     |
| Israel               | 4.80       | 4.33                                                     |
| Korea, Rep.          | 4.58       | 4.97                                                     |
| Lithuania            | 4.34       | 6.89                                                     |
| Luxembourg           | 5.31       | 5.03                                                     |
| Malaysia             | 4.80       | 5.92                                                     |
| Malta                | 4.96       | 4.38                                                     |
| Mauritius            | 4.63       | 4.47                                                     |
| Mexico               | 4.38       | 5.04                                                     |
| Morocco              | 4.27       | 4.73                                                     |
| Singapore            | 5.31       | 5.45                                                     |
| Slovak Republic      | 4.68       | 5.04                                                     |
| Spain                | 5.18       | 4.70                                                     |
| Thailand             | 4.58       | 5.15                                                     |
| Tunisia              | 4.76       | 4.40                                                     |
| United Arab Emirates | 5.09       | 5.22                                                     |

Source: World Economic Forum and WTTC.

**Table 6: Question Marks in the Travel & Tourism growth-policy risk matrix**

| Country/economy        | TTCI score | WTTC T&T projected economic growth (2007–16, annualized) |
|------------------------|------------|----------------------------------------------------------|
| Albania                | 3.75       | 7.40                                                     |
| Algeria                | 3.67       | 4.94                                                     |
| Bangladesh             | 3.21       | 5.34                                                     |
| Benin                  | 3.28       | 5.31                                                     |
| Bosnia and Herzegovina | 3.51       | 6.22                                                     |
| Botswana               | 3.99       | 4.85                                                     |
| Burkina Faso           | 3.41       | 4.99                                                     |
| Burundi                | 2.88       | 4.59                                                     |
| Cambodia               | 3.64       | 7.15                                                     |
| Cameroon               | 3.25       | 4.73                                                     |
| Chad                   | 2.68       | 6.43                                                     |
| China                  | 3.97       | 8.45                                                     |
| Ethiopia               | 3.26       | 4.83                                                     |
| India                  | 4.14       | 6.58                                                     |
| Indonesia              | 4.20       | 4.63                                                     |
| Macedonia, FYR         | 3.81       | 5.28                                                     |
| Namibia                | 3.95       | 7.91                                                     |
| Nepal                  | 3.49       | 5.10                                                     |
| Nicaragua              | 3.76       | 4.85                                                     |
| Pakistan               | 3.52       | 4.41                                                     |
| Philippines            | 3.79       | 5.11                                                     |
| Poland                 | 4.18       | 4.33                                                     |
| Romania                | 3.91       | 6.68                                                     |
| Russian Federation     | 4.03       | 6.36                                                     |
| Serbia and Montenegro  | 4.18       | 5.32                                                     |
| South Africa           | 4.18       | 4.68                                                     |
| Sri Lanka              | 3.89       | 5.52                                                     |
| Tanzania               | 3.86       | 4.51                                                     |
| Trinidad and Tobago    | 3.79       | 4.85                                                     |
| Uganda                 | 3.56       | 4.70                                                     |
| Ukraine                | 3.89       | 4.51                                                     |
| Vietnam                | 3.78       | 7.05                                                     |

Source: World Economic Forum and WTTC.

**Table 7: Cash Cows in the Travel & Tourism growth-policy risk matrix**

| Country/economy    | TTCI score | WTTC T&T projected economic growth (2007–16, annualized) |
|--------------------|------------|----------------------------------------------------------|
| Australia          | 5.21       | 3.13                                                     |
| Austria            | 5.54       | 1.93                                                     |
| Belgium            | 5.07       | 2.82                                                     |
| Bulgaria           | 4.31       | 3.95                                                     |
| Canada             | 5.31       | 3.32                                                     |
| Chile              | 4.58       | 3.50                                                     |
| Denmark            | 5.27       | 1.35                                                     |
| Dominican Republic | 4.35       | 4.14                                                     |
| Finland            | 5.16       | 2.81                                                     |
| France             | 5.23       | 3.38                                                     |
| Germany            | 5.48       | 2.77                                                     |
| Greece             | 4.99       | 3.68                                                     |
| Iceland            | 5.45       | 2.09                                                     |
| Ireland            | 4.93       | 3.81                                                     |
| Italy              | 4.78       | 1.70                                                     |
| Jamaica            | 4.41       | 3.91                                                     |
| Japan              | 4.99       | 2.40                                                     |
| Jordan             | 4.52       | 3.89                                                     |
| Netherlands        | 5.08       | 2.09                                                     |
| New Zealand        | 5.20       | 3.04                                                     |
| Norway             | 5.04       | 3.05                                                     |
| Panama             | 4.28       | 4.11                                                     |
| Portugal           | 5.05       | 3.83                                                     |
| Qatar              | 4.71       | 3.41                                                     |
| Slovenia           | 4.58       | 4.05                                                     |
| Sweden             | 5.13       | 3.07                                                     |
| Switzerland        | 5.66       | 2.07                                                     |
| Taiwan, China      | 4.82       | 4.28                                                     |
| Turkey             | 4.32       | 3.82                                                     |
| United Kingdom     | 5.28       | 2.42                                                     |
| United States      | 5.43       | 2.91                                                     |
| Uruguay            | 4.28       | 3.95                                                     |

Source: World Economic Forum and WTTC.

**Table 8: Dogs in the Travel & Tourism growth-policy risk matrix**

| Country/economy | TTCI score | WTTC T&T projected economic growth (2007–16, annualized) |
|-----------------|------------|----------------------------------------------------------|
| Angola          | 2.89       | 2.23                                                     |
| Argentina       | 4.18       | 3.31                                                     |
| Bolivia         | 3.46       | 4.21                                                     |
| Brazil          | 4.20       | 3.82                                                     |
| Colombia        | 3.96       | 4.27                                                     |
| Ecuador         | 3.64       | 3.68                                                     |
| El Salvador     | 3.90       | 2.81                                                     |
| Gambia          | 3.81       | 3.81                                                     |
| Guatemala       | 4.00       | 4.12                                                     |
| Guyana          | 3.56       | 3.09                                                     |
| Honduras        | 3.78       | 3.53                                                     |
| Kenya           | 3.62       | 3.77                                                     |
| Kuwait          | 4.08       | 3.73                                                     |
| Lesotho         | 3.12       | 2.88                                                     |
| Madagascar      | 3.44       | 3.44                                                     |
| Malawi          | 3.31       | 3.80                                                     |
| Mali            | 3.50       | 4.02                                                     |
| Nigeria         | 3.30       | 4.24                                                     |
| Paraguay        | 3.44       | 3.43                                                     |
| Peru            | 3.86       | 4.20                                                     |
| Suriname        | 3.47       | 3.71                                                     |
| Venezuela       | 3.62       | 3.18                                                     |
| Zambia          | 3.66       | 2.19                                                     |
| Zimbabwe        | 3.48       | 1.87                                                     |

Source: World Economic Forum and WTTC.

## CHAPTER 1.4

# Tourism Competitiveness and the Development Agenda

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The World Economic Forum's Travel & Tourism Competitiveness Index (TTCI) adds a new dimension to the increasing awareness of the importance of the Travel & Tourism (T&T) sector in global and national socioeconomic activity.<sup>1</sup>

As a partner in the project and as the UN agency responsible for the sustainable development of the sector and its contribution to the UN Millennium Development Goals (MDGs), the United Nations World Tourism Organization (UNWTO) wants to reflect on the outputs of the TTCI in the following two key respects:

- fundamentals of tourism competition and development, and
- enhancing competitiveness for the poorest countries.

The UNWTO's key conclusions are as follows.

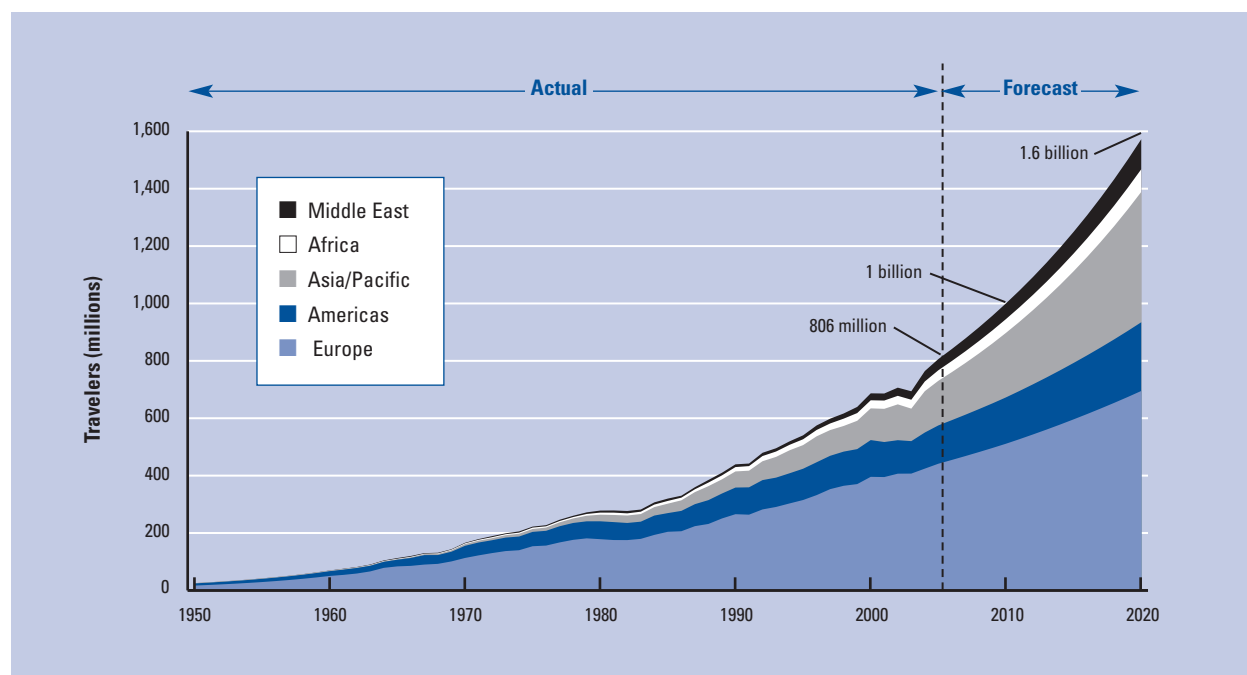
- Showing the full economic impact of the sector in the Index will enhance Travel & Tourism's relevance for policymakers.
- The Index makes clear that, although industrialized states currently dominate, poorer countries have a massive potential to be the leading force in international tourism.
- There should be widespread adoption of the UN Tourism Satellite Account (UNTSA), the recognized tool for measuring the impact of tourism and travel-related activity in a national economy.
- Tourism should be mainstreamed for development.
- Tourism services should be reinvigorated in the World Trade Organization's Doha Development Round.

## Tourism competition and development

Today, no one disputes the importance of competitiveness, of the need for progressive global cohesion of the conditions of competition, of level playing fields, of minimum regulation, or of public-private partnerships for delivery of results. Nor is there much argument over the fact that competition has well-demonstrated positive and negative effects. On one hand it opens markets, keeps prices down, and broadens product offerings. On the other hand, without ancillary regulatory measures, it can also breed monopoly, unfair business conditions, and market exclusion or concentration which in turn can lead to social inequality and significant potential for conflict.

It is also increasingly recognized, however, that competition is a means to an end rather than an end in itself. As such, it must ultimately contribute to the kind of socioeconomic goals sought in the Millennium Declaration. These goals include not only quantifiable



**Figure 1: International tourist arrivals (1950–2020)**

Source: UNWTO.

information such as creation of wealth, jobs, trade, and investment; they also include less quantifiable matters such as sharing benefits, encouraging entrepreneurs, empowering women, and preserving natural and cultural heritage as well as regenerating urban and rural communities. Together these features help to build peace, understanding and a fairer society.

There is also growing recognition among the development community of the scale, scope, and impact of the demand for tourism—business and leisure travel—and of its spread from industrialized to developing markets, and the impact of its effect on the infrastructure and environment by the complex of industries who collaborate to provide travel services to meet that demand.

From 1950 to 2005, international tourism arrivals expanded at an annual rate of 6.5 percent, growing from 25 million to 806 million travelers. The income generated by these arrivals grew at an even stronger rate, reaching 11 percent during the same period, outgrowing the world economy. Today, the business volume of tourism surpasses that of many major export categories such as food products or textiles. Tourism has become one of the major players in international commerce, and represents at the same time one of the main income sources for many developing countries (see Figure 1).

This growth goes hand in hand with an increasing diversification and competition among destinations. In 1950 the top 15 destinations absorbed 97 percent of international arrivals; in 1980 the share was 70 percent, and it decreased to 58 percent in 2005 (see Table 1).

Against this background we believe the TTCI can be important in a number of ways.

#### **Showing the full economic impact of the sector in the Index will enhance Travel & Tourism's relevance for policymakers.**

The Index, in looking for competitiveness in the sector, rightly shows Travel & Tourism in terms of both consumer demand and matching supply from the diverse cluster of industries that provide services to travelers.

Historically, the internationally accepted System of National Accounts has not identified tourism consumption separately; its components have been reflected individually in areas such as transport, accommodation, restaurants, and so on.

As the T&T sector has grown in importance in the past two decades, and with the realization that it has catalytic effects in related sectors, the UNWTO has led an initiative to measure its impact in national accountings. This initiative has resulted in the Tourism Satellite Account (UN TSA), supported by public sector bodies such as the Organisation for Economic Co-operation and Development (OECD) and private groups such as the World Travel & Tourism Council (WTTC); it has also been formally accepted by the UN Statistical System in relation to National Accounting. It is gradually being applied by the International Monetary Fund (IMF) in relation to the balance of payments and by the International Labour Organization (ILO) in regard to employment, as well by an increasing number of countries around the world.



**Table 1: World's top 10 tourism destinations by international tourist arrivals**

| Rank         | 1950              | World share (%) | 1980                  | World share (%) | 2005               | World share (%) |
|--------------|-------------------|-----------------|-----------------------|-----------------|--------------------|-----------------|
| 1            | United States     | 71              | France                | 40              | France             | 33              |
| 2            | Canada            |                 | United States         |                 | Spain              |                 |
| 3            | Italy             |                 | Spain                 |                 | United States      |                 |
| 4            | France            |                 | Italy                 |                 | China              |                 |
| 5            | Switzerland       |                 | Austria               |                 | Italy              |                 |
| 6            | Ireland           | 17              | Mexico                | 20              | United Kingdom     | 14              |
| 7            | Austria           |                 | Canada                |                 | Mexico             |                 |
| 8            | Spain             |                 | United Kingdom        |                 | Germany            |                 |
| 9            | Germany           |                 | Germany               |                 | Turkey             |                 |
| 10           | United Kingdom    |                 | Belgium               |                 | Austria            |                 |
| 11           | Norway            | 9               | Switzerland           | 10              | Russian Federation | 11              |
| 12           | Argentina         |                 | Yugoslav SFR          |                 | Canada             |                 |
| 13           | Mexico            |                 | Poland                |                 | Malaysia           |                 |
| 14           | Netherlands       |                 | Former Czechoslovakia |                 | Ukraine            |                 |
| 15           | Denmark           |                 | Greece                |                 | Poland             |                 |
|              | Others            | 3               | Others                | 30              | Others             | 42              |
| <b>TOTAL</b> | <b>25 million</b> |                 | <b>278 million</b>    |                 | <b>806 million</b> |                 |

Source: UNWTO.

The macroeconomic indicators give an approximation of UNTSA results and hence an indication of the substantial scale of the economic impact of the industry. Specifics, however, should be treated with some caution, particularly with GDP and employment derivations in the indirect areas of demand. As the UNTSA is increasingly applied at the country level, this weakness can be rectified.

At a microeconomic level, the effect of the T&T industry could be even more significant. This is because of the extensive role of tourism demand in stimulating directly related economic sectors such as transport and accommodation, as well as indirectly related sectors such as food, manufacturing, construction, and maintenance.

#### The TTCI makes clear the great competitive advantages that industrialized states currently enjoy in this sector.

It is clear from the *absolute* values and rankings that the industrialized states overwhelmingly lead in the World Economic Forum's competitiveness stakes. However, this is foremost the reflection of the comparatively long tradition those economies have in tourism development (that is, the countries that were among the first 15 destinations in 1950 top the competitiveness ranking). Overall, they are losing share in the global market, and recent developments for most have been far from dynamic.

It is equally clear that in many respects these same states have the better ability to compete because of their sheer size, capital, tourist volumes, and infrastructure. Moreover, most of the private sector companies benefiting

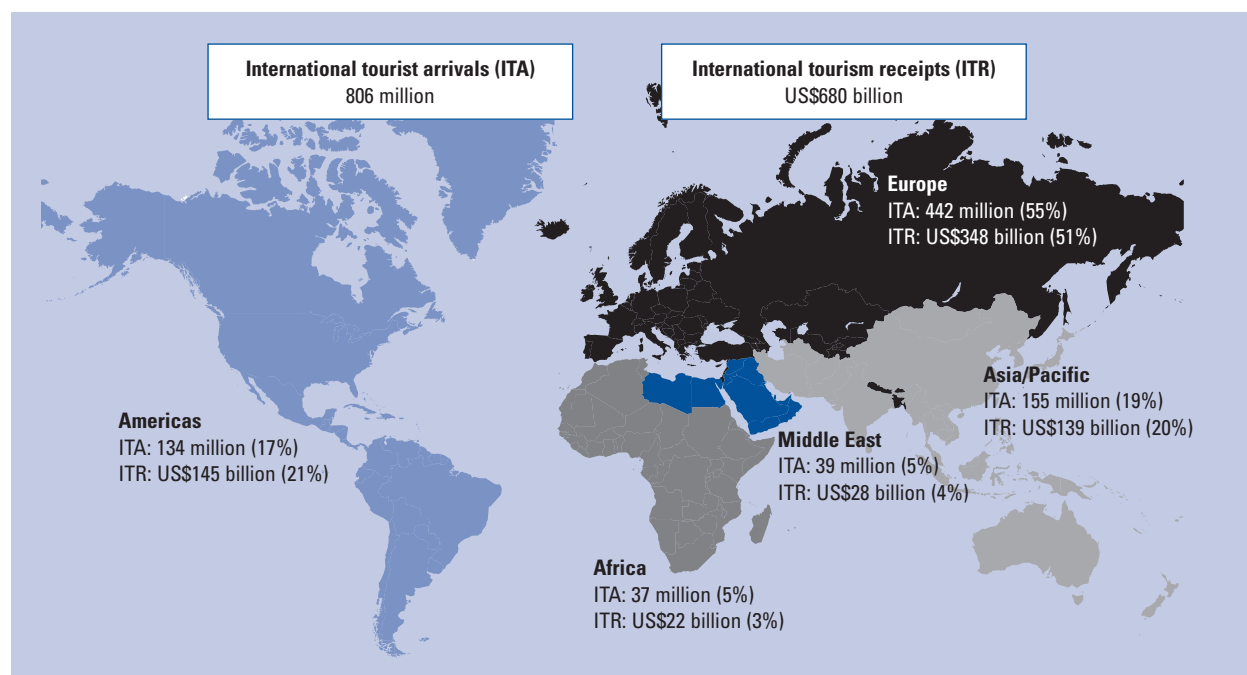
from global tourism expansion are from the industrialized world. Some of the high performance, however, may be due to the nature of the survey data currently used. The population base of respondents, for example, will have a greater business travel focus than the population as a whole, and thus may well not accurately reflect perceptions of destinations that are more leisure oriented—such as small island states in the Caribbean and Pacific. This can be rectified easily over time.

In a similar way the TTCI might show general competitiveness criteria—such as the ICT base or infrastructure base of the economy—but fail to show some key tourism-related deficiencies, such as border complexity or the position on tourism facility investment or airline ownership. We expect to see these elements more specifically covered in future iterations and plan to provide input in these areas.

It is also important to note here the difference between domestic and international impacts of Travel & Tourism. The former is currently more significant for the industrialized markets—particularly in the European Union and the United States, where domestic traffic volumes can be five to ten times greater than international volumes, where competition regimes that create a level playing field are in place, and where the reduction of barriers to travel can be unilaterally determined.

#### The TTCI shows that poorer countries have a massive potential to be competitive in international tourism.

Some developing countries—such as Brazil, China, India, and South Africa—do have significant domestic

**Figure 2: International tourism (2005)**

Source: UNWTO.

traffic. If the regional markets of Northeast Asia, South Asia, Southern African Development and Economic Co-operation (SADEC) and Mercosur are taken into account, there is a broader quasi domestic base. In general terms, however, the poorer countries have yet to develop effectively their domestic tourism activity.

At the international level it is a different story. The starting point here is to consider the international arrivals and revenue index published annually by UNWTO and featured in the country profiles of section 2.1 of this Report. It is the case that the industrialized countries still dominate rankings, but some emerging and developing countries are performing very well in this area. In fact, China and India have emerged in recent years as strong performers, along with Thailand, Turkey, Egypt, South Africa, Kenya, Central American destinations, and lately the Mekong countries Laos, Cambodia, and Vietnam. See Appendix A for an overview of basic indicators of destinations and their growth rate in the past decade.

International tourism revenues are a services export. International tourism represents one third of all trade in services, and it is the services sector that will provide the economic growth and jobs in the decades ahead. It is here that the real returns and potential can be seen for the poorer countries (see Figure 2).

The world's poorest countries have some real comparative advantages in regard to tourism exports, which include:

- exceptional product potential based on nature, culture, and heritage;
- their presence in the mainstream of evolving market need;
- relatively unspoiled environments with a major ecotourism focus;
- favorable trade balance because of their low outbound traffic; and
- abundant labor with a low cost base.

Their disadvantages, which are well documented, include low skill levels, inadequate capital base, poor infrastructure—both physical and digital—poor transport services, related import leakages, and so on.

Despite their weakness in absolute terms, many of these poorest economies have been advancing significantly in relative terms:

- Between 1990 and 2005, developing economies' market share of international arrivals grew from 28.6 percent to 40.3 percent (see Table 2 and Figure 3).
- For small island economies with largely international service, the UNWTO estimates that up to 40 percent of their GDP and jobs can be generated by Travel & Tourism.

**Table 2: International tourist arrivals**

|                                             | Million arrivals |            |            | Market share (%) |            |            | Average annual growth (%) |            |
|---------------------------------------------|------------------|------------|------------|------------------|------------|------------|---------------------------|------------|
|                                             | 1990             | 2000       | 2005       | 1990             | 2000       | 2005       | 1990–2000                 | 2000–05    |
| <b>World</b>                                | <b>439</b>       | <b>689</b> | <b>808</b> | <b>100</b>       | <b>100</b> | <b>100</b> | <b>4.6</b>                | <b>3.3</b> |
| Developing economies                        | 126              | 243        | 326        | 28.6             | 35.2       | 40.3       | 6.8                       | 6.1        |
| 50 Least Developed Countries (LDCs)         | 2.9              | 6.4        | 9.5        | 0.7              | 0.9        | 1.2        | 8.4                       | 8.2        |
| Other low- and low-middle-income economies* | 46.7             | 111.4      | 163.5      | 10.6             | 16.2       | 20.2       | 9.1                       | 8.0        |
| Upper-middle-income economies*              | 76.0             | 124.7      | 152.7      | 17.3             | 18.1       | 18.9       | 5.1                       | 4.1        |
| High-income economies                       | 313.4            | 446.2      | 482.6      | 71.4             | 64.8       | 59.7       | 3.6                       | 1.6        |

Source: UNWTO; data as collected by UNWTO September 2006.

\* According to the World Bank classification (July 2006).

**Table 3: International tourism receipts (current prices)**

|                                             | US\$ billion |            |            | Market share (%) |            |            | Average annual growth (%) |            |
|---------------------------------------------|--------------|------------|------------|------------------|------------|------------|---------------------------|------------|
|                                             | 1990         | 2000       | 2005       | 1990             | 2000       | 2005       | 1990–2000                 | 2000–05    |
| <b>World</b>                                | <b>273</b>   | <b>483</b> | <b>682</b> | <b>100</b>       | <b>100</b> | <b>100</b> | <b>5.9</b>                | <b>7.1</b> |
| Developing economies                        | 50           | 126        | 205        | 18.1             | 26.1       | 30.1       | 9.8                       | 10.2       |
| 50 Least Developed Countries (LDCs)         | 1.1          | 3.0        | 5.3        | 0.4              | 0.6        | 0.8        | 10.5                      | 12.0       |
| Other low- and low-middle-income economies* | 22.7         | 63.0       | 102.1      | 8.3              | 13.0       | 15.0       | 10.7                      | 10.2       |
| Upper-middle-income economies*              | 25.8         | 60.1       | 97.5       | 9.4              | 12.5       | 14.3       | 8.8                       | 10.1       |
| High-income economies                       | 223.8        | 356.8      | 476.6      | 81.9             | 73.9       | 69.9       | 4.8                       | 6.0        |

Source: UNWTO, data as collected by UNWTO September 2006.

\* According to the World Bank classification (July 2006).

- For LDCs—the 50 poorest countries, most of which are in Africa—the rate of growth in arrivals from 2000 to 2005 was 48 percent, almost three times the global growth rate.
- During the same period, LDC international tourism receipts grew by 76 percent, compared with a worldwide growth of 41 percent (see Table 3).
- In 2006 the growth rate for international arrivals to Africa is forecast at 10.6 percent, compared with a global growth forecast of 4.6 percent.

It is not only the export income that is important for developing countries, it is also the flow through in terms of jobs, infrastructure, education and training, and health standards as well as the synergistic boost in related sectors that a vibrant T&T industry can provide. In addition Travel & Tourism, if effectively managed, can play an important role in promoting sustainable development—both in providing leadership through ecotourism and as a vehicle for preserving natural and cultural heritage.<sup>2</sup> It can support local companies, encourage entrepreneurship through stimulation of small and medium enterprises, and help rural regeneration.

### Enhancing competitiveness for the poorest economies

Against this background, the UNWTO contends that the primary consideration of the TTCI should be to

serve as a tool to support the global development agenda. The Index shows:

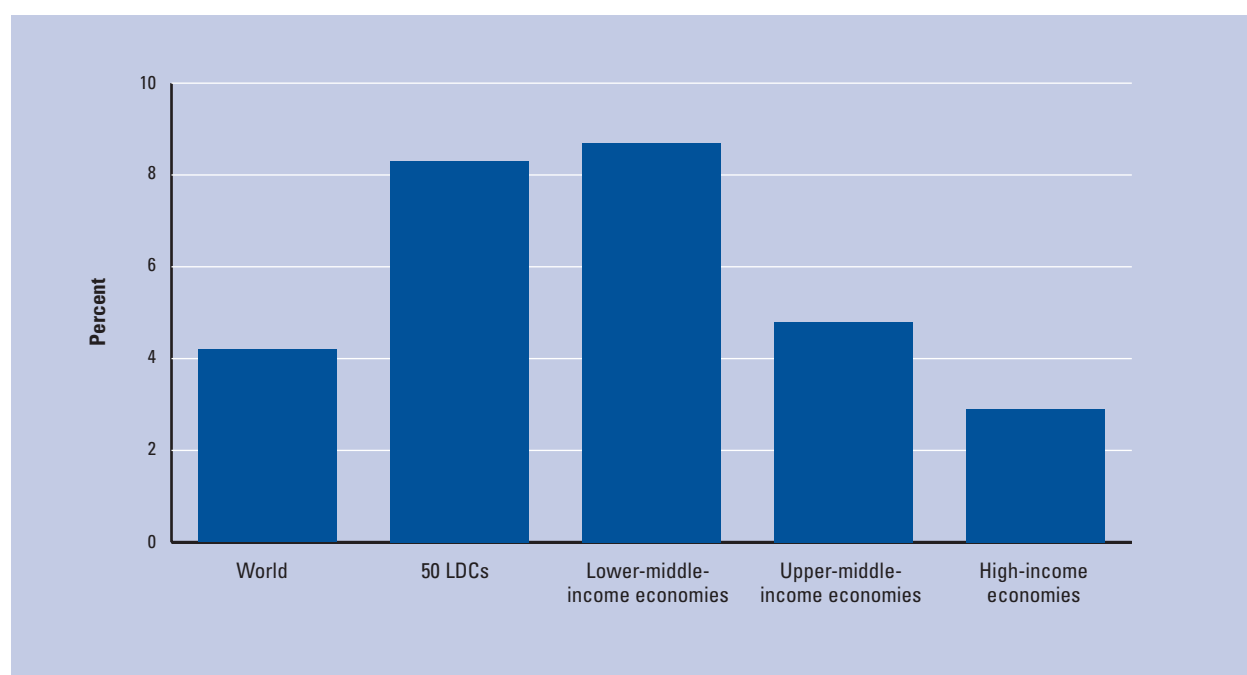
- the overriding T&T competitive dominance of industrialized states,
- the opportunities for developing economies in this area, and
- the high value of increased T&T services for developing economies.

There are three main initiatives we believe should be pursued in this context.

### Widespread adoption of the UN Tourism Satellite Account (UN TSA)

The Index gives an indication of the value of T&T services in terms of macroeconomic indicators, of consumption, and of the impacts in the T&T supply side and across related sectors. However, it is only with *routine* provision of T&T data in coherence with national accounts that governments will have the information needed to frame pro-development policies with confidence.

The UNTSA provides both the measurement and the confidence because of its incorporation into the 1993 System of National Accounts and the rigor of its application. However, the parallel challenge of application is the requirement of capacity inside national statistical offices and departments of economy and trade to ensure interface with traditional systems. This is a considerable undertaking even for industrialized states—and hence

**Figure 3. Average annual growth in international tourist arrivals, selected country groupings (1990–2005)**

Source: UNWTO.

Note: Country groupings are according to the UNWTO. Emerging and LDC markets accounted for over 320 million international arrivals and US\$200 billion revenue in 2005, and grew at almost twice the rates of the industrialized markets. Virtually all LDC states are tourism exporters.

much more demanding for poor ones. A number of states nevertheless have embarked on the process with support from UNWTO. The system is slowly spreading around the world.<sup>3</sup>

What is needed is increased public- and private-sector support to accelerate the implementation process in the world's poorest countries so that the development institutions—particularly the World Bank—can have the relevant information to deal with Travel & Tourism as a strategic priority sector.

### Mainstreaming tourism for development

There are two interrelated actions required to make a significant difference in enhancing the competitiveness of the poorest countries:

- Developing states must highlight Travel & Tourism in their national Poverty Reduction Strategy Papers (PRSP).
- Development financing institutions—the World Bank Group, the regional development banks, and bilateral aid agencies must recognize the impact of Travel & Tourism in their support strategies.

The fact that Travel & Tourism is the major services export for so many developing countries and has the potential to provide a genuine competitive advantage for all poor countries is a pivotal issue. Even in those countries with significant exports such as oil or commodities, it is clear that Travel & Tourism offers an opportunity

for economic diversification, a wide spread of benefits to communities, a creation of jobs, and long-term sustainability that no other sector can provide.

Analysis shows the strong linkage of Travel & Tourism to other sectors such as agriculture, infrastructure, education, and construction to competition regulation, environment standards, foreign exchange, and employment as well as to education, capacity building, and the like. The UNWTO has developed a number of programs to help states generally use Travel & Tourism in their development projects, with a special focus on Africa. They have created a dedicated program—ST-EP—to link Sustainable Tourism and Elimination of Poverty in a disciplined way and to tap global funding for identified tourism activities, focusing on community-based actions. In 2007, with the governments of Canada and the province of Quebec, they will add a dedicated Centre of Excellence to improve the competitiveness and quality performance of tourism destinations.

### Re-invigorating tourism services in the Doha Development Round

Action that can enhance the competitiveness of developing states on a comprehensive basis could most effectively be taken within the framework of the World Trade Organization—both in the final stages of the Doha Development Round and in the continuing work of the organization in subsequent rounds.

While tourism services are under discussion in the Doha Round—and indeed more commitments have been made in this area than in any other sector—the

fact is that this is so far a relatively routine process that fails to grasp the full development potential of the sector.

- The process fails so far to cover T&T services cohesively as defined in the UNTSA, because negotiations are based on historical tourism clusters. It does not incorporate the key air transport sector, rather dealing with it separately despite the evident linkages with T&T competitiveness.
- It fails so far to provide commitments in a way that offers good, stable domestic conditions for investment in developing countries, for the expansion of related financial services, and for provision of state-of-the-art communications services.
- It fails so far to link Travel & Tourism with development and poverty alleviation and thus to consider the range of capacity building support measures available for poor countries' competitiveness enhancement.
- It fails so far to link Travel & Tourism with sustainable development, despite the clear interrelationship with the sector and despite particularly its importance for developing countries.
- It fails so far effectively to recognize the links between Travel & Tourism and infrastructure such as roads, ports, airports, and telecommunications channels, which are vital for effective T&T competition in developing states.
- It fails so far to capitalize on the links between Travel & Tourism and agriculture and the way in which rural tourism development can help to support agricultural communities, where poverty levels are often very high.

It could be argued that with these weaknesses, at this stage in the negotiations, it would not be practical to address this kind of an agenda. The fact is, however, that the World Trade Organization has a capacity for rapid action as the close of a Round draws near, and a pro-development and sustainability T&T package could be a valuable component of any end game. Agriculture, transport, financial services, and telecommunications are already part of the World Trade Organization discussions. It is merely a question of governments instructing their negotiators to specifically include T&T interests.

Moreover, the WTO process will extend far beyond the current negotiations, and far beyond the MDG target date of 2015. Given the development and antipoverty imperatives recognized in the Doha Development Agenda, there is a good case for intensifying the process now.

## Notes

- 1 This kind of index presentation is a work in progress—it is a broad-brush measure defined by its inputs. It is also complementary to other sectoral indexes, and in some cases encompasses them. Here, the outputs reflect general World Economic Forum business information as provided by the Executive Opinion Survey, amplified by sector-specific questions and data sources. These sources include UNWTO data on hotel rooms per capita. Further, the Index acknowledges the UNTSA comprehensive approach for measurement of tourism economic impacts, as UNWTO datasets for international arrivals and revenue have been used by the World Economic Forum for testing the explanatory power of the Index. This UNWTO data also features prominently in the country profiles of part 2.1 of this Report.
- 2 A free download of the brochure *Tourism and Least Developed Countries: A Sustainable Opportunity to Reduce Poverty* is available at [www.unwto.org/sustainable/doc/tourism-and-ldc.pdf](http://www.unwto.org/sustainable/doc/tourism-and-ldc.pdf).
- 3 For more information on the United Nations Tourism Satellite Account (UNWTO), see the UNWTO website at [www.unwto.org/statistics](http://www.unwto.org/statistics). See Appendix B for a comprehensive overview of Tourism Characteristic Products as used in the UNTSA. More than 20 states have full implementation in process and a further 50 are examining application measures. UNWTO is working to extend this globally.

## References

For an overview of UNWTO publications in the field of poverty alleviation and sustainable tourism, see the UNWTO website at [www.unwto.org/frame/frameset/frame\\_sustainable.html](http://www.unwto.org/frame/frameset/frame_sustainable.html).

### Appendix A: International tourism, average annual growth 1995–2005 (countries and territories with more than 150,000 arrivals and more than US\$150 million in receipts)

|                               | Population<br>(millions) | International tourist arrivals <sup>a</sup> |         |                     |                                           |                                         | International tourism receipts (current prices) |         |                    |                                           |                                     |
|-------------------------------|--------------------------|---------------------------------------------|---------|---------------------|-------------------------------------------|-----------------------------------------|-------------------------------------------------|---------|--------------------|-------------------------------------------|-------------------------------------|
|                               |                          | (1,000 arrivals)                            |         |                     | Average annual<br>growth (%) <sup>b</sup> | Arrivals per<br>1,000 pop. <sup>b</sup> | (US\$, million)                                 |         |                    | Average annual<br>growth (%) <sup>b</sup> | Receipts<br>per capita <sup>b</sup> |
|                               |                          | 1995                                        | 2000    | 2005                |                                           |                                         | 1995                                            | 2000    | 2005               |                                           |                                     |
| World                         | 6,449                    | 541,000                                     | 687,000 | 806,000             | 4.1                                       | 125                                     | 411,000                                         | 483,000 | 682,000            | 5.2                                       | 106                                 |
| Cambodia                      | 13.6                     | 220                                         | 466     | 1,422               | 20.5                                      | 104                                     | 53                                              | 304     | 840                | 31.8                                      | 62                                  |
| Qatar                         | 0.9                      | 309                                         | 378     | 913                 | 11.4                                      | 1,058                                   | n/a                                             | 128     | 760                | 35.7                                      | 881                                 |
| Georgia                       | 4.7                      | 85                                          | 387     | 560                 | 20.7                                      | 120                                     | n/a                                             | 97      | 239                | 22.5                                      | 51                                  |
| Latvia                        | 2.3                      | 539                                         | 509     | 1,116               | 7.6                                       | 487                                     | 20                                              | 131     | 341                | 32.8                                      | 149                                 |
| Kazakhstan                    | 15.2                     | n/a                                         | 1,471   | 3,073 <sup>c</sup>  | n/a                                       | 203                                     | 122                                             | 356     | 701                | 19.1                                      | 46                                  |
| Croatia (tce)                 | 4.5                      | 1,485                                       | 5,831   | 8,467               | 19.0                                      | 1,883                                   | 1,349                                           | 2,782   | 7,463              | 18.7                                      | 1,660                               |
| El Salvador                   | 6.7                      | 235                                         | 795     | 1,154               | 17.3                                      | 172                                     | 85                                              | 217     | 543                | 20.4                                      | 81                                  |
| Mongolia                      | 2.8                      | 108                                         | 137     | 338                 | 12.1                                      | 121                                     | 21                                              | 36      | 177                | 23.7                                      | 63                                  |
| Ethiopia                      | 73.1                     | 103                                         | 136     | 227                 | 8.2                                       | 3                                       | 16                                              | 57      | 168                | 26.5                                      | 2                                   |
| Ukraine                       | 47.0                     | 3,716                                       | 6,431   | 15,629 <sup>c</sup> | 10.9                                      | 330                                     | 191                                             | 394     | 3,125              | 22.0                                      | 67                                  |
| Yemen (ths)                   | 20.7                     | 61                                          | 73      | 336                 | 18.6                                      | 16                                      | 50                                              | 73      | 181                | 13.7                                      | 9                                   |
| Algeria (vf)                  | 32.5                     | 520                                         | 866     | 1,443               | 10.7                                      | 44                                      | 33                                              | 96      | 178 <sup>c</sup>   | 20.7                                      | 6                                   |
| Iran                          | 64.7                     | 489                                         | 1,342   | 1,659 <sup>c</sup>  | 14.5                                      | 26                                      | 67                                              | 467     | 1,074 <sup>c</sup> | 14.0                                      | 17                                  |
| Zambia                        | 11.1                     | 163                                         | 457     | 515 <sup>c</sup>    | 13.6                                      | 47                                      | 47                                              | 111     | 161 <sup>c</sup>   | 14.7                                      | 15                                  |
| Oman (ths/tf)                 | 3.0                      | 279                                         | 571     | 1,195 <sup>c</sup>  | 17.5                                      | 412                                     | n/a                                             | 221     | 481                | 10.7                                      | 160                                 |
| Uganda                        | 28.2                     | 160                                         | 193     | 468                 | 11.3                                      | 17                                      | 78                                              | 165     | 355                | 16.4                                      | 13                                  |
| Botswana                      | 1.6                      | 521                                         | 1,104   | 1,523 <sup>c</sup>  | 12.7                                      | 929                                     | 162                                             | 222     | 562                | 13.2                                      | 343                                 |
| United Arab Emirates (ths)    | 2.6                      | 2,315                                       | 3,907   | 5,871 <sup>d</sup>  | 12.3                                      | 2,363                                   | 632                                             | 1,063   | 2,200              | 13.3                                      | 858                                 |
| Honduras                      | 7.2                      | 271                                         | 471     | 673                 | 9.5                                       | 94                                      | 107                                             | 260     | 472                | 16.0                                      | 66                                  |
| Trinidad and Tobago           | 1.08                     | 260                                         | 399     | 463                 | 5.9                                       | 431                                     | 77                                              | 213     | 453                | 19.4                                      | 421                                 |
| Brazil                        | 186                      | 1,991                                       | 5,313   | 5,358               | 10.4                                      | 29                                      | 972                                             | 1,810   | 3,861              | 14.8                                      | 21                                  |
| Nicaragua                     | 5.5                      | 281                                         | 486     | 712                 | 9.7                                       | 130                                     | 50                                              | 129     | 207                | 15.3                                      | 38                                  |
| Turkey                        | 69.7                     | 7,083                                       | 9,586   | 20,273              | 11.1                                      | 291                                     | 4,957                                           | 7,636   | 18,152             | 13.9                                      | 261                                 |
| Bahrain                       | 0.7                      | 1,396                                       | 2,420   | 3,914               | 10.9                                      | 5,686                                   | 247                                             | 573     | 920                | 14.1                                      | 1,337                               |
| Lithuania                     | 3.6                      | 650                                         | 1,083   | 2,000               | 11.9                                      | 556                                     | 77                                              | 391     | 921                | 12.6                                      | 256                                 |
| Estonia                       | 1.3                      | 530                                         | 1,220   | 1,917               | 13.7                                      | 1,438                                   | 357                                             | 508     | 951                | 10.3                                      | 714                                 |
| Guatemala                     | 12.2                     | 563                                         | 826     | 1,316               | 8.9                                       | 108                                     | 213                                             | 482     | 869                | 15.1                                      | 71                                  |
| Peru                          | 27.9                     | 479                                         | 828     | 1,486               | 12.0                                      | 53                                      | 428                                             | 837     | 1,308              | 11.8                                      | 47                                  |
| Morocco                       | 32.7                     | 2,602                                       | 4,278   | 5,843               | 8.4                                       | 179                                     | 1,296                                           | 2,039   | 4,621              | 13.6                                      | 141                                 |
| China                         | 1,306                    | 20,034                                      | 31,229  | 46,809              | 8.9                                       | 36                                      | 8,730                                           | 16,231  | 29,296             | 12.9                                      | 22                                  |
| Saudi Arabia                  | 26.4                     | 3,325                                       | 6,585   | 9,100               | 10.6                                      | 344                                     | n/a                                             | n/a     | 6,111              | n/a                                       | 231                                 |
| Bulgaria                      | 7.5                      | 3,466                                       | 2,785   | 4,837               | 3.4                                       | 649                                     | 473                                             | 1,076   | 2,429              | 17.8                                      | 326                                 |
| Egypt                         | 77.5                     | 2,871                                       | 5,116   | 8,244               | 11.1                                      | 106                                     | 2,684                                           | 4,345   | 6,851              | 9.8                                       | 88                                  |
| Syrian Arab Republic (tce/tf) | 18.4                     | 815                                         | 1,416   | 3,368               | 15.2                                      | 183                                     | 1,258                                           | 1,082   | 2,175              | 5.6                                       | 118                                 |
| Bosnia and Herzegovina (tce)  | 4.4                      | n/a                                         | 171     | 213                 | 8.0                                       | 48                                      | n/a                                             | 233     | 567                | 12.6                                      | 128                                 |
| Ghana                         | 22.0                     | 286                                         | 399     | 429                 | 4.1                                       | 19                                      | 11                                              | 335     | 796                | 15.9                                      | 36                                  |
| Bolivia                       | 8.9                      | 284                                         | 319     | 504                 | 5.9                                       | 57                                      | 55                                              | 68      | 205                | 14.0                                      | 23                                  |
| Vietnam (vf)                  | 83.5                     | 1,351                                       | 2,140   | 3,468               | 9.9                                       | 42                                      | n/a                                             | n/a     | 1,880              | n/a                                       | 23                                  |
| Lebanon                       | 3.8                      | 450                                         | 742     | 1,140               | 9.7                                       | 298                                     | n/a                                             | n/a     | 5,432              | n/a                                       | 1,420                               |
| Turks and Caicos              | 0.02                     | 79                                          | 152     | 200                 | 9.7                                       | 9,730                                   | 53                                              | 285     | n/a                | n/a                                       | 15,583                              |
| Cuba                          | 11.35                    | 742                                         | 1,741   | 2,261               | 11.8                                      | 199                                     | 963                                             | 1,737   | 1,920              | 7.1                                       | 169                                 |
| Jordan                        | 5.8                      | 1,075                                       | 1,580   | 2,987               | 10.8                                      | 519                                     | 660                                             | 723     | 1,441              | 8.1                                       | 250                                 |
| South Africa (vf)             | 44.3                     | 4,684                                       | 6,001   | 7,518               | 4.8                                       | 170                                     | 2,125                                           | 2,675   | 7,327              | 13.2                                      | 165                                 |
| Macao (China)                 | 0.4                      | 4,202                                       | 5,197   | 9,014               | 7.9                                       | 20,067                                  | 3,102                                           | 3,208   | 7,980              | 9.9                                       | 17,765                              |
| India                         | 1,094                    | 2,124                                       | 2,649   | 3,919               | 6.3                                       | 4                                       | 2,581                                           | 3,460   | 7,478              | 11.2                                      | 7                                   |
| Panama                        | 3.1                      | 345                                         | 484     | 702                 | 7.4                                       | 224                                     | 309                                             | 458     | 780                | 9.7                                       | 248                                 |
| Costa Rica                    | 4.0                      | 785                                         | 1,088   | 1,679               | 7.9                                       | 418                                     | 681                                             | 1,302   | 1,570              | 8.7                                       | 391                                 |
| Greece                        | 10.7                     | 10,130                                      | 13,096  | 14,276              | 3.5                                       | 1,338                                   | 4,135                                           | 9,219   | 13,731             | 12.8                                      | 1,287                               |
| Belize                        | 0.3                      | 131                                         | 196     | 236                 | 6.1                                       | 841                                     | 78                                              | 111     | 204                | 10.1                                      | 726                                 |
| Malaysia                      | 24.0                     | 7,469                                       | 10,222  | 16,431              | 8.2                                       | 686                                     | 3,969                                           | 5,011   | 8,543              | 8.0                                       | 357                                 |
| Dominican Rep.                | 9.09                     | 1,776                                       | 2,978   | 3,691               | 7.6                                       | 406                                     | 1,571                                           | 2,860   | 3,508              | 8.4                                       | 386                                 |
| Iceland (tce)                 | 0.3                      | 190                                         | 634     | 871                 | 6.9                                       | 2,935                                   | 186                                             | 229     | 409                | 8.2                                       | 1,378                               |
| Namibia                       | 2.0                      | 272                                         | 656     | 695 <sup>d</sup>    | 12.4                                      | 349                                     | 278                                             | 160     | 348                | 2.3                                       | 171                                 |
| Hong Kong (China)             | 6.9                      | n/a                                         | 8,814   | 14,773              | 11.0                                      | 2,141                                   | 7,760                                           | 5,907   | 10,286             | 2.9                                       | 1,491                               |
| Ecuador (vf)                  | 13.4                     | 440                                         | 627     | 860                 | 6.9                                       | 64                                      | 255                                             | 402     | 486                | 6.7                                       | 36                                  |
| Mauritius                     | 1.2                      | 422                                         | 656     | 761                 | 6.1                                       | 618                                     | 430                                             | 542     | 871                | 7.3                                       | 708                                 |
| Senegal (ths/tf)              | 11.9                     | 280                                         | 389     | 769                 | 10.6                                      | 65                                      | 168                                             | 144     | 212 <sup>c</sup>   | 2.8                                       | 18                                  |
| Slovenia (tc)                 | 2.0                      | 732                                         | 1,090   | 1,555               | 7.8                                       | 773                                     | 1,082                                           | 965     | 1,801              | 5.2                                       | 895                                 |
| New Zealand (vf)              | 4.0                      | 1,409                                       | 1,787   | 2,365               | 5.3                                       | 586                                     | 2,318                                           | 2,267   | 4,865              | 7.7                                       | 1,206                               |

(cont'd.)



### Appendix A: International tourism, average annual growth 1995–2005 (countries and territories with more than 150,000 arrivals and more than US\$150 million in receipts) (cont'd.)

|                      | International tourist arrivals <sup>a</sup> |                  |        |                     |                                           |                                         | International tourism receipts (current prices) |        |                  |                                           |                                     |
|----------------------|---------------------------------------------|------------------|--------|---------------------|-------------------------------------------|-----------------------------------------|-------------------------------------------------|--------|------------------|-------------------------------------------|-------------------------------------|
|                      | Population<br>(millions)                    | (1,000 arrivals) |        |                     | Average annual<br>growth (%) <sup>b</sup> | Arrivals per<br>1,000 pop. <sup>b</sup> | (US\$, million)                                 |        |                  | Average annual<br>growth (%) <sup>b</sup> | Receipts<br>per capita <sup>b</sup> |
|                      | 2005                                        | 1995             | 2000   | 2005                | 1995–2005                                 |                                         | 1995                                            | 2000   | 2005             | 1995–2005                                 | US\$                                |
| Pakistan             | 162                                         | 378              | 557    | 798                 | 7.8                                       | 5                                       | 110                                             | 81     | 180              | 5.0                                       | 1                                   |
| Tanzania             | 36.8                                        | 285              | 459    | 566 <sup>c</sup>    | 7.9                                       | 16                                      | 502                                             | 377    | 796              | 4.7                                       | 22                                  |
| Romania (tce)        | 22.3                                        | 766              | 867    | 1,430               | 6.4                                       | 64                                      | 590                                             | 359    | 1,051            | 5.9                                       | 47                                  |
| Ireland              | 4.0                                         | 4,818            | 6,646  | 7,333               | 4.3                                       | 1,826                                   | 2,208                                           | 2,633  | 4,744            | 7.9                                       | 1,181                               |
| Slovakia (tce)       | 5.4                                         | 903              | 1,053  | 1,515               | 5.3                                       | 279                                     | 623                                             | 433    | 1,210            | 6.9                                       | 223                                 |
| Denmark (tce)        | 5.4                                         | n/a              | 3,535  | 4,562               | 8.9                                       | 840                                     | 3,673                                           | 3,694  | 4,954            | 3.0                                       | 912                                 |
| Br.Virgin Islands    | 0.02                                        | 219              | 272    | 337                 | 4.4                                       | 14,883                                  | 211                                             | 345    | 391 <sup>c</sup> | 7.1                                       | 17,623                              |
| Spain                | 40.3                                        | 34,920           | 47,898 | 55,882              | 4.8                                       | 1,385                                   | 25,252                                          | 29,968 | 47,891           | 6.6                                       | 1,187                               |
| Czech Republic (tce) | 10.2                                        | 3,381            | 4,773  | 6,336               | 6.5                                       | 619                                     | 2,880                                           | 2,973  | 4,631            | 4.9                                       | 452                                 |
| Sweden (tce)         | 9.0                                         | 2,309            | 2,746  | 3,133               | 3.1                                       | 348                                     | 3,471                                           | 4,064  | 7,427            | 7.9                                       | 825                                 |
| Colombia             | 43.0                                        | 1,399            | 557    | 933                 | 4.4                                       | 22                                      | 657                                             | 1,030  | 1,218            | 6.4                                       | 28                                  |
| Australia (vf/tf)    | 20.1                                        | 3,726            | 4,530  | 5,020               | 3.0                                       | 250                                     | 8,125                                           | 9,274  | 16,866           | 7.6                                       | 840                                 |
| Philippines          | 87.9                                        | 1,760            | 1,992  | 2,623               | 4.1                                       | 30                                      | 1,136                                           | 2,156  | 2,130            | 6.5                                       | 24                                  |
| Belgium (tce)        | 10.4                                        | 5,560            | 6,457  | 6,747               | 2.0                                       | 651                                     | 4,548                                           | 6,592  | 9,861            | 8.0                                       | 951                                 |
| Fiji                 | 0.9                                         | 318              | 294    | 550                 | 5.6                                       | 616                                     | 291                                             | 182    | 439              | 4.2                                       | 491                                 |
| Sri Lanka            | 20.5                                        | 403              | 400    | 549                 | 3.1                                       | 27                                      | 226                                             | 248    | 429              | 6.6                                       | 21                                  |
| Luxembourg (tce)     | 0.5                                         | 768              | 852    | 913                 | 1.7                                       | 1,948                                   | 1,721                                           | 1,806  | 3,616            | 7.7                                       | 7,716                               |
| Aruba                | 0.07                                        | 619              | 721    | 733                 | 1.7                                       | 10,236                                  | 521                                             | 814    | 1,095            | 7.7                                       | 15,304                              |
| Netherlands (tce)    | 16.4                                        | 6,574            | 10,003 | 10,012              | 4.3                                       | 610                                     | 6,578                                           | 7,217  | 10,475           | 4.8                                       | 638                                 |
| Finland              | 5.2                                         | 1,779            | 2,714  | 3,140               | 5.8                                       | 601                                     | 1,641                                           | 1,406  | 2,186            | 2.9                                       | 419                                 |
| Germany (tce)        | 82.4                                        | 14,838           | 18,992 | 21,500              | 3.8                                       | 261                                     | 18,001                                          | 18,693 | 29,204           | 5.0                                       | 354                                 |
| US Virgin Islands    | 0.1                                         | 454              | 546    | 575                 | 2.4                                       | 5,001                                   | 822                                             | 1,206  | 1,493            | 6.1                                       | 12,466                              |
| Japan                | 127                                         | 3,345            | 4,757  | 6,728               | 7.2                                       | 53                                      | 3,224                                           | 3,373  | 12,439           | 1.2                                       | 98                                  |
| Taiwan (China) (vf)  | 22.9                                        | 2,332            | 2,624  | 3,378               | 3.8                                       | 148                                     | 3,286                                           | 3,738  | 5,040            | 4.4                                       | 220                                 |
| Argentina            | 39.5                                        | 2,289            | 2,909  | 3,895               | 5.5                                       | 99                                      | 2,222                                           | 2,904  | 2,753            | 2.2                                       | 70                                  |
| Puerto Rico          | 3.91                                        | 3,131            | 3,341  | 3,686               | 1.6                                       | 942                                     | 1,828                                           | 2,388  | 3,239            | 5.9                                       | 828                                 |
| Norway               | 4.6                                         | 2,880            | 3,104  | 3,859               | 3.0                                       | 840                                     | 2,238                                           | 2,050  | 3,495            | 4.6                                       | 761                                 |
| Hungary              | 10.0                                        | n/a              | n/a    | 10,048              | n/a                                       | 1,004                                   | 2,953                                           | 3,757  | 4,271            | 3.8                                       | 427                                 |
| Tunisia              | 10.1                                        | 4,120            | 5,058  | 6,378               | 4.5                                       | 633                                     | 1,530                                           | 1,683  | 2,063            | 3.0                                       | 205                                 |
| Mexico               | 106                                         | 20,241           | 20,641 | 21,915              | 0.8                                       | 206                                     | 6,179                                           | 8,294  | 11,803           | 6.7                                       | 111                                 |
| Saint Lucia          | 0.17                                        | 231              | 270    | 318                 | 3.2                                       | 1,912                                   | 230                                             | 281    | 345              | 4.1                                       | 2,074                               |
| Portugal             | 10.6                                        | 9,511            | 12,097 | 11,617 <sup>c</sup> | 2.2                                       | 1,104                                   | 4,831                                           | 5,243  | 7,931            | 5.1                                       | 751                                 |
| Thailand             | 64.2                                        | 6,952            | 9,579  | 11,567              | 5.2                                       | 180                                     | 8,039                                           | 7,468  | 9,591            | 1.8                                       | 149                                 |
| France               | 60.7                                        | 60,033           | 77,190 | 76,001              | 2.4                                       | 1,253                                   | 27,587                                          | 30,757 | 42,276           | 4.4                                       | 697                                 |
| French Polynesia     | 0.3                                         | 172              | 252    | 208                 | 1.9                                       | 769                                     | 326                                             | n/a    | 522              | 4.8                                       | 1,928                               |
| United Kingdom (vf)  | 60.7                                        | 23,537           | 25,209 | 29,970              | 2.4                                       | 494                                     | 20,500                                          | 21,857 | 30,675           | 4.1                                       | 506                                 |
| Canada               | 32.8                                        | 16,932           | 19,555 | 18,612              | 1.0                                       | 567                                     | 7,917                                           | 10,778 | 13,584           | 5.5                                       | 414                                 |
| Jamaica              | 2.74                                        | 1,147            | 1,323  | 1,479               | 2.6                                       | 541                                     | 1,069                                           | 1,333  | 1,545            | 3.8                                       | 565                                 |
| Kenya                | 34.9                                        | 896              | 899    | 1,399               | 4.6                                       | 40                                      | 486                                             | 283    | 579              | 1.8                                       | 17                                  |
| St. Maarten          | n/a                                         | 449              | 432    | 462                 | 0.3                                       | n/a                                     | 349                                             | 511    | 619              | 5.9                                       | n/a                                 |
| Reunion              | 0.8                                         | 304              | 430    | 409                 | 3.0                                       | 526                                     | 283                                             | 296    | 384              | 3.1                                       | 494                                 |
| Chile                | 16.0                                        | 1,540            | 1,742  | 2,027               | 2.8                                       | 127                                     | 911                                             | 819    | 1,256            | 3.3                                       | 79                                  |
| Korea, Rep. (vf)     | 48.6                                        | 3,753            | 5,322  | 6,022               | 4.8                                       | 124                                     | 5,150                                           | 6,834  | 5,660            | 0.9                                       | 116                                 |
| Maldives             | 0.3                                         | 315              | 467    | 395                 | 2.3                                       | 1,132                                   | 211                                             | 321    | 287              | 3.1                                       | 821                                 |
| Russian Federation   | 143                                         | n/a              | n/a    | 19,940              | n/a                                       | 140                                     | 4,312                                           | 3,429  | 5,564            | 2.6                                       | 39                                  |
| Bahamas              | 0.30                                        | 1,598            | 1,544  | 1,608               | 0.1                                       | 5,328                                   | 1,346                                           | 1,734  | 2,069            | 4.4                                       | 6,856                               |
| Barbados             | 0.28                                        | 442              | 545    | 548                 | 2.2                                       | 1,963                                   | 622                                             | 723    | 776              | 2.2                                       | 2,784                               |
| Cyprus               | 0.8                                         | 2,100            | 2,686  | 2,470               | 1.6                                       | 3,166                                   | 1,798                                           | 1,941  | 2,318            | 2.6                                       | 2,971                               |
| Antigua, Barbados    | 0.07                                        | 220              | 207    | 245                 | 1.1                                       | 3,571                                   | 247                                             | 291    | 327              | 2.8                                       | 4,758                               |
| United States        | 296                                         | 43,490           | 51,219 | 49,206              | 1.2                                       | 166                                     | 63,395                                          | 82,400 | 81,680           | 2.6                                       | 276                                 |
| Italy                | 58.1                                        | 31,052           | 41,181 | 36,513              | 1.6                                       | 628                                     | 28,731                                          | 27,493 | 35,398           | 2.1                                       | 609                                 |
| Austria (tce)        | 8.2                                         | 17,173           | 17,982 | 19,952              | 1.5                                       | 2,438                                   | 12,927                                          | 9,931  | 15,467           | 1.8                                       | 1,890                               |
| Curaçao              | n/a                                         | 224              | 191    | 222                 | −0.1                                      | n/a                                     | 175                                             | 189    | 239              | 3.2                                       | n/a                                 |
| Malta                | 0.4                                         | 1,116            | 1,216  | 1,171               | 0.5                                       | 2,937                                   | 656                                             | 587    | 775              | 1.7                                       | 1,945                               |
| Switzerland (ths)    | 7.5                                         | 6,946            | 7,821  | 7,229               | 0.4                                       | 965                                     | 9,459                                           | 7,777  | 11,040           | 1.6                                       | 1,474                               |
| Indonesia            | 229                                         | 4,324            | 5,064  | 5,002               | 1.5                                       | 22                                      | 5,229                                           | 4,975  | 4,521            | −1.4                                      | 20                                  |
| Singapore            | 4.4                                         | 6,070            | 6,062  | 7,080               | 1.6                                       | 1,600                                   | 7,611                                           | 5,142  | 5,740            | −2.8                                      | 1,297                               |
| Uruguay              | 3.4                                         | 2,022            | 1,968  | 1,808               | −1.1                                      | 529                                     | 611                                             | 713    | 594              | −0.3                                      | 174                                 |
| Israel               | 6.3                                         | 2,215            | 2,417  | 1,903               | −1.5                                      | 303                                     | 2,993                                           | 4,088  | 2,853            | −0.5                                      | 455                                 |
| Martinique           | 0.43                                        | 457              | 526    | 484                 | 0.6                                       | 1,118                                   | 384                                             | 302    | 280              | −3.1                                      | 647                                 |

(cont'd.)



### Appendix A: International tourism, average annual growth 1995–2005 (countries and territories with more than 150,000 arrivals and more than US\$150 million in receipts) (cont'd.)

|                | Population<br>(millions) | International tourist arrivals <sup>a</sup> |        |        |                                           |                                         | International tourism receipts (current prices) |       |       |                                           |                                     |
|----------------|--------------------------|---------------------------------------------|--------|--------|-------------------------------------------|-----------------------------------------|-------------------------------------------------|-------|-------|-------------------------------------------|-------------------------------------|
|                |                          | (1,000 arrivals)                            |        |        | Average annual<br>growth (%) <sup>b</sup> | Arrivals per<br>1,000 pop. <sup>b</sup> | (US\$, million)                                 |       |       | Average annual<br>growth (%) <sup>b</sup> | Receipts<br>per capita <sup>b</sup> |
|                |                          | 1995                                        | 2000   | 2005   | 1995–2005                                 |                                         | 1995                                            | 2000  | 2005  | 1995–2005                                 | US\$                                |
| Nepal          | 27.7                     | 363                                         | 464    | 376    | 0.3                                       | 14                                      | 177                                             | 158   | 132   | –2.9                                      | 5                                   |
| Venezuela      | 25.4                     | 700                                         | 469    | 706    | 0.1                                       | 28                                      | 849                                             | 423   | 641   | –2.8                                      | 25                                  |
| Zimbabwe (vf)  | 12.2                     | 1,416                                       | 1,967  | 1,559  | 1.0                                       | 128                                     | 145                                             | 125   | 99    | –3.7                                      | 8                                   |
| Poland         | 38.6                     | 19,215                                      | 17,400 | 15,200 | –2.3                                      | 394                                     | 6,614                                           | 5,677 | 6,284 | –0.5                                      | 163                                 |
| Bermuda        | 0.07                     | 387                                         | 332    | 270    | –3.6                                      | 4,124                                   | 488                                             | 431   | 430   | –1.3                                      | 6,578                               |
| Cayman Islands | 0.04                     | 361                                         | 354    | 168    | –7.4                                      | 3,790                                   | 394                                             | 559   | 353   | –1.1                                      | 7,974                               |

Note: Country order is from fastest- to slowest-growing destination according to weighted average of annual growth rate for international arrivals and for international tourism receipts.

a Last year or years with consistent series available

b Tourist arrivals are designated with a code in parentheses after the country name. Arrivals are measured as international tourist arrivals at frontiers (excluding same-day visitors) (tf) unless otherwise indicated; international visitor arrivals at frontiers (tourists and same-day visitors) (vf); international tourist arrivals at hotels and similar establishments (ths); and international tourist arrivals at collective tourism establishments (tce).

c Data are from 2004.

d Data are from 2003.

Source: UNWTO; data as collected in UNWTO database November 2006.

## Appendix B: Tourism characteristic products from UNTSA

| CPC/code | Title                                                                                           | CPC/code | Title                                                                                      |
|----------|-------------------------------------------------------------------------------------------------|----------|--------------------------------------------------------------------------------------------|
| 63110.0  | Hotel and motel lodging services                                                                | 72211.1  | Support services to time shares activities                                                 |
| 63191.0  | Holiday center and holiday home services                                                        | 73111.0  | Leasing or rental services concerning cars and light vans without operator                 |
| 63192.0  | Letting services of furnished accommodation                                                     | 73114.1  | Leasing or rental services concerning campers/motor homes without operator                 |
| 63193.0  | Youth hostel services                                                                           | 73115.1  | Leasing or rental services concerning passenger vessels without operator                   |
| 63194.0  | Children's training and holiday camp services                                                   | 73116.1  | Leasing or rental services concerning passenger aircraft without operator                  |
| 63195.0  | Camping and caravanning site services                                                           | 73240.1  | Non-motorized land transport equipment leasing or rental services                          |
| 63199.1  | Sleeping-car and similar services in other transport media; hall residence of students          | 73240.2  | Winter sports equipment leasing or rental services                                         |
| 63210.0  | Meal serving services with full restaurant services                                             | 73240.3  | Non-motorized air transport equipment leasing or rental services                           |
| 63220.0  | Meal serving services in self-service facilities                                                | 73240.4  | Water sports and beach equipment leasing or rental services                                |
| 63290.0  | Other food serving services                                                                     | 73240.5  | Camping equipment leasing or rental services                                               |
| 63300.0  | Beverage serving services for consumption on the premises                                       | 73240.6  | Saddle horse leasing or rental services                                                    |
| 64111.1  | Scheduled rail services                                                                         | 73290.1  | Photographic camera rental services                                                        |
| 64111.2  | Non-scheduled rail services                                                                     | 85970.0  | Trade fair and exhibition organization services                                            |
| 64213.0  | Interurban scheduled road transport services of passengers                                      | 87143.0  | Maintenance and repair services of trailers, semi-trailers and other motor vehicles n.e.c. |
| 64214.0  | Interurban special purpose scheduled road transport services of passengers                      | 87149.1  | Maintenance and repair services of leisure vessels of own use                              |
| 64219.1  | Scheduled ski-hills services                                                                    | 87149.2  | Maintenance and repair services of leisure aircraft of own use                             |
| 64221.0  | Taxi services                                                                                   | 91131.1  | Fishing license services                                                                   |
| 64222.0  | Rental services of passenger cars with operator                                                 | 91131.2  | Hunting license services                                                                   |
| 64223.0  | Rental services of buses and coaches with operator                                              | 91210.1  | Passport issuing services                                                                  |
| 65111.0  | Coastal and transoceanic water transport services of passengers by ferries                      | 91210.2  | Visa issuing services                                                                      |
| 65119.1  | Other coastal and transoceanic scheduled water transport services of passengers                 | 96230.0  | Performing arts facility operation services                                                |
| 65119.2  | Other coastal and transoceanic non-scheduled water transport services of passengers             | 96310.0  | Services of performing artists                                                             |
| 65119.3  | Cruise ship services                                                                            | 96411.0  | Museum services except for historical sites and buildings                                  |
| 65119.4  | Passenger services on freight vessels                                                           | 96412.0  | Preservation services of historical sites and buildings                                    |
| 65130.1  | Rental services of passenger vessels for coastal and transoceanic water transport with operator | 96421.0  | Botanical and zoological garden services                                                   |
| 65211.0  | Inland water transport services of passengers by ferries                                        | 96422.0  | Nature reserve services including wildlife preservation services                           |
| 65219.1  | Scheduled passenger services                                                                    | 96510.0  | Sports and recreational sports event promotion and organization services                   |
| 65219.2  | Sightseeing excursion services                                                                  | 96520.1  | Golf course services                                                                       |
| 65219.3  | Cruise services                                                                                 | 96520.2  | Ski fields operation services                                                              |
| 65230.0  | Rental services of inland water passenger vessels with operator                                 | 96520.3  | Race circuit                                                                               |
| 66110.0  | Scheduled air transport services of passengers                                                  | 96520.5  | Recreation park and beach services                                                         |
| 66120.1  | Non-scheduled air transport services of passengers                                              | 96590.1  | Risk sport and adventure                                                                   |
| 66120.2  | Sightseeing services, aircraft or helicopter                                                    | 96620.2  | Guide services (mountain, hunting and fishing)                                             |
| 66400.0  | Rental services of aircraft with operator                                                       | 96910.1  | Theme park services                                                                        |
| 67300.0  | Navigational aid services                                                                       | 96910.2  | Amusement park services                                                                    |
| 67400.0  | Supporting services for railway transport                                                       | 96910.3  | Fair and carnival services                                                                 |
| 67510.0  | Bus station services                                                                            | 96920.1  | Casino services                                                                            |
| 67530.1  | Parking of passenger terminal transport                                                         | 96920.2  | Slot machine services                                                                      |
| 67610.0  | Port and waterway services (excl. cargo handling)                                               | 97230.4  | Spa services                                                                               |
| 67690.1  | Vessel fuelling services                                                                        | 97910.0  | Escort services                                                                            |
| 67690.2  | Maintenance and upkeep services to private recreation passenger services                        |          |                                                                                            |
| 67710.0  | Airport operation services (excl. cargo handling)                                               |          |                                                                                            |
| 67790.0  | Other supporting services for air or space transport                                            |          |                                                                                            |
| 67811.0  | Travel agency services                                                                          |          |                                                                                            |
| 67812.0  | Tour operator services                                                                          |          |                                                                                            |
| 67813.0  | Tourist information services                                                                    |          |                                                                                            |
| 67820.0  | Tourist guide services                                                                          |          |                                                                                            |
| 71100.1  | Travel card services                                                                            |          |                                                                                            |
| 71100.2  | Travel loan services                                                                            |          |                                                                                            |
| 71311.1  | Travel life insurance services                                                                  |          |                                                                                            |
| 71320.1  | Travel accident insurance services                                                              |          |                                                                                            |
| 71320.2  | Travel health insurance services                                                                |          |                                                                                            |
| 71334.1  | Passenger's aircraft of own use insurance services                                              |          |                                                                                            |
| 71334.2  | Passenger's vessel of own use insurance services                                                |          |                                                                                            |
| 71339.1  | Travel insurance services                                                                       |          |                                                                                            |
| 71552.0  | Foreign exchange services                                                                       |          |                                                                                            |



## CHAPTER 1.5

# Fulfilling the Promise: Positives and Potentials of Travel & Tourism

MARILYN CARLSON NELSON, Chairman and CEO, Carlson

*We are at a critical juncture in history, where what we need most at this time is a generally accepted understanding of how different people, different countries, different regions are to deal with each other; how the management of global interdependence works, particularly at a time when we have to confront new issues on the global agenda. We need to remind ourselves of our common destiny as true citizens of this world, and to facilitate a dialogue in which we can re-emphasize the values we share and create a common vision of the future.*

—Professor Klaus Schwab,  
Founder and Executive Chairman,  
World Economic Forum<sup>1</sup>

It is clear that Travel & Tourism (T&T) is an industry like no other. It is an exciting industry whose product is the very fabric of our world; an industry of truly fabulous places; and most importantly, of fabulous faces.

It is an industry of richness, of texture, and of connections that brings together people, transcends borders, and can—if we do it right—knit the world together both in good times and bad.

It is an industry with deep connections to all the others: vehicle manufacture, construction, agriculture, energy. Choose an industry, and Travel & Tourism is a major consumer of other industries' goods.

It is a “hyper-industry” arching over all the others. In fact, it is so large and influential that it is usually unrecognizable and incomprehensible to many leaders. It is akin to staring at the base of a mountain without looking up, and asking “what mountain?”

This chapter seeks to examine the promise that Travel & Tourism has offered to the world's economies and societies, and in doing so to let the reader decide whether it has lived up to that promise. What further promise does it hold? How do we achieve its full potential?

## Promises and potential

There is clear evidence in and around the industry that Travel & Tourism is a positive force for the economic and social development of an economy. This evidence includes statistics that demonstrate growth, indications of communities springing up where they were not thriving before, and new freedoms and improvements being afforded in developing economies. The industry has also shown its commitment to leading on sustainable Travel & Tourism. The environmental responsibilities of the industry are being recognized through green programs that encompass hotel construction and design, cruise ship operations, and local environmental programs.

For thousands of years, Travel & Tourism has brought economic, social, and cultural benefits to economies and communities around the globe. From

the earliest days of hand-hewn boats traversing new riverways to the touchdown of the largest jumbo jet, trade and curiosity have always been the catalysts, with the goal of improving individual lives.

Until only recently, Travel & Tourism was limited by technology and economics. Ocean-going vessels provided the earliest form of intercontinental travel, which was usually reserved for the world's wealthiest citizens.

With the advent of the airplane and jet travel, the predictions of our world becoming a global village have come true, bringing all the benefits—and conflicts—that occur when people of different cultures, economic systems, and religious beliefs interact. However, in the case of Travel & Tourism, the malady is also the medicine. Any social problems brought by the interaction of peoples have the potential to be solved by increased interaction and an expanding economic prosperity that follows.

### The economic promise

Travel & Tourism continues to be one of the world's fastest growing and most critical economic sectors, creating quality jobs and careers as well as improved economic standing for people around the globe. The World Travel & Tourism Council (WTTC) estimates that the industry generates 234 million jobs and contributes more than 10 percent of the global gross domestic product (GDP).<sup>2</sup> In both industrialized and developing economies the industry is critical to the social and economic fabric; in some cases, Travel & Tourism is an economy's single largest employer.

### The promised fulfilled in developed nations

In developed economies the overall T&T industry is mature, strong, and resilient. Despite an unprecedented march of natural and artificial disasters and negative economic factors (increasing fuel costs and so on) in the first years of the 21st century, the industry continues to grow in developed nations and regions.

Direct impacts are found with transportation services, retail services, food services, hotel expansions, and natural resource development and renovation. Indirect benefits include improved personal economic conditions, improved health care, and expanded infrastructure for use by citizens.

Following are examples of the economic experience of two of the world's most developed T&T economies.

#### The European experience

Economic research by the WTTC indicates that in the European Union Travel & Tourism is an overwhelming economic force. This is quite understandable, considering that the region currently holds 33.2 percent of world market share of Travel & Tourism.

The influx of international tourists to the European Union has measurable positive effects on member nations'

economies: fully one in 8.5 jobs (11.8 percent) in the region is dependent on Travel & Tourism, and 3.9 percent of the GDP is dependent on the industry. Of the total capital investment in the European Union, 8.6 percent is related to Travel & Tourism. Governments would have 3.2 percent less to spend were it not for the taxes and related fees collected by T&T entities.<sup>3</sup>

Europe's growth in tourists in 2006 is expected to be 3.1 percent and the region will remain a top-tier destination. If the current rate of growth is maintained it would mean some 14 million additional arrivals to the continent in 2006.

The European T&T engine is demonstrably connected to the overall health of government and related industries—even seemingly unrelated industries that fall within its long shadow.

#### The US experience

The dependence of even the world's largest economy on Travel & Tourism was evidenced following the 9/11 terrorist attacks on the United States. The resulting drop in Travel & Tourism cut a broad swath through the US economy, negatively affecting everything from auto sales to restaurant receipts.

While the country saw a precipitous fall in the post-attack years of 2001–03, today Travel & Tourism has returned to pre-9/11 levels and regained its place as one of the United States' largest exports and largest employers.

The Travel Industry Association of America (TIA) reports international travelers brought US\$93 billion into the United States in 2004 (an export). This continued to fuel an industry that is linked to 7.3 million jobs generated directly by travel, or one in eight non-farm jobs in America.

Government tax coffers also benefited: local, state, and federal governments collected US\$100 billion in direct tax revenue from T&T-related industries. Without the collections generated by the T&T industry, every US household would pay US\$924.00 more in taxes.<sup>4</sup> In 2006 TIA forecasts that the United States will increase its international visitors by 6.1 percent.

#### The promise for developing economies

Regions and governments throughout the tourism-developing world are eagerly maximizing their unique offerings on a wider scale than ever before. Along with the movement of goods and services, globalization has meant a greater movement of people—many of them tourists.

Whereas only a few years ago competition for tourists was an arena in which only four or five nations played, today the ease of communication and connectedness of cultures have encouraged dozens of new entrants into the market, making it more competitive and raising the bar in the competition.

Today economies are committing major funding to their marketing budgets abroad: the top 20 destinations spend a minimum of US\$9.5 million all the way up to US\$151 million to attract visitors.

At Carlson we have this increased competition for the T&T dollar and have even built a business on it. Carlson Destination Marketing Services (CDMS) is a Carlson division that assists governments and regional groups to present their unique offerings more effectively, especially to new and targeted markets. The Kenya Tourist Board has been a client of CDMS for six years, during which time travel has increased from the United States to Kenya by more than 70 percent, bringing more than 100,000 new visitors to Kenya from the United States and Canada. CDMS is currently engaged by more than a dozen tourism destinations, each attempting to accomplish a similar goal and take a larger share of an increasing pie.

An overview of the developing regions that currently hold the greatest potential for T&T economic growth follows.

### Africa

United Nations World Tourism Organization (UNWTO) Secretary-General Francesco Frangialli underscored the importance of Africa's development of Travel & Tourism, saying, "This African tourism success story is particularly important for the fight against poverty and the progress towards the Millennium Development Goals, where this sector can play a pivotal role for every State on the continent."<sup>5</sup>

With an expected overall growth rate in people visiting Africa of 10.6 percent for 2006, Africa is this year again the world's regional leader in terms of percentage growth. Between January and August of 2006, international tourist arrivals increased by 9.8 percent.

### Asia and the Pacific

Asia and the Pacific has been the world's second fastest growing region in the first eight months of 2006 (+8.3 percent). Despite some sharp differences, the region's overall performance is notable, especially considering that the T&T sector has suffered from natural disasters, health scares, and political unrest.

### Middle East

The Middle East's positive results (+6 percent growth in visitors to the Middle East) have to be interpreted within its geopolitical context and its impact on tourism flows. Data available so far show that the conflict between Israel and Lebanon had only very limited impact on the pace of the growth of the region as a whole.

Although conflict has taken its toll on tourism demand for some destinations, others—such as Dubai and Abu Dhabi—are viewed as safe destinations and have experienced high demand, offsetting the lost

visitors to other areas in the region. Past experience suggests that traveler confidence can recover quickly, and industry experts point to the many other times that the Middle East has proven its capacity for recovery.

### Central and South America

In the developing Americas, some regions exceeded growth averages: Central America (+8.7 percent), South America (+8.1 percent), and the Caribbean (+5.1 percent). Others declined—such as Mexico (−3.8 percent).

South and Central America benefited both from higher expenditures by US travelers and more arrivals of European tourists. At the same time, intraregional travel performed on a high level.

### Rising giants

The BRIC countries (Brazil, Russia, India, and China) are each emerging giants in the T&T industry and represent tremendous opportunities for impact across the globe.

China is the pacesetter—for inbound, outbound, and intracountry travel. Travel & Tourism and related businesses will generate 13.2 percent of China's GDP, and will be responsible for 10.2 percent of jobs. Through the next decade, the industry will experience 8.7 percent annual growth in jobs, and will represent 8.3 percent of capital investment in the country per year.

The full impact of Travel & Tourism has yet to be felt in Russia, where the industry accounts for only 6.6 percent of jobs and 7.8 percent of GDP. Over the next decade the industry is expected to grow 6.5 percent per year in Russia, and to represent 9.3 percent of capital investment in the country each year.

In Brazil, Travel & Tourism is anticipated to generate US\$70.4 million of economic activity, have a direct and indirect impact on 6.4 percent of all jobs, and account for 6.7 percent of GDP. The industry is expected to grow by 4.3 percent per annum, in real terms, through 2016.

India is experiencing the volcanic eruption of a middle class with the means, opportunity, and desire to travel. Looking forward to a 20 percent per year increase in international aviation as a result of the recent opening of India's skies, that country's airline industry has ordered 300 planes in the last 18 months; including the largest airplane order in history: Air India's order of Boeing aircraft worth US\$11 billion.

### The social promise

The American author Mark Twain wrote "Travel is fatal to prejudice, bigotry and narrow mindedness" (1869). Travel & Tourism creates new contexts for understanding global issues, constructing unique connections to lubricate understanding between peoples and nations. The promise of Travel & Tourism is about improving the lives of all persons involved, both visitor and host.

For host economies and communities, the business of Travel & Tourism is unique in the social promise it holds forth, which come in both short-term and long-term forms.

#### Short-term benefits

- Travel & Tourism tends to be a “clean industry” (differing from other “processing” industries such as manufacturing).
- Travel & Tourism tends not to deplete natural resources. It is not dependent on raw resources.
- Travel & Tourism creates a natural agenda of sustainability. Since it is an industry that depends greatly on a destination’s special attractions and cultures, it must drive a natural agenda for the preservation and honoring of those attractions and cultures.
- Travel & Tourism spurs (and pays for) infrastructure development most often needed in developing nations (such as roads, housing, and communications).
- Travel & Tourism generates revenue for governments from those who do not have long-term dependence on that government’s resources. Visitor tax revenues can be used to support the education, health, and safety of a society long after visitors have returned to their own nations and communities.

#### Long-term benefits

- By its very nature, Travel & Tourism transports not just the body but also the subconscious into different cultures, landscapes, social mores, skin colors, and languages. It reaches across borders to build bonds previously unimagined and unrealized.
- Upon the conscientious tourist, Travel & Tourism confers both a privilege and a responsibility toward the society being visited. To the host it brings an obligation to present the best of a people and a society. The long-term effect on the interplay of people and cultures is, in fact, the essence of civilized behavior.
- Areas where war and poverty are the norm stand the most to benefit from the powerful economic effects of tourism outlined earlier. Violence driven by poverty falls victim to the real result of employment offered by Travel & Tourism. Since most new tourism jobs and businesses are created in developing economies, the industry helps to equalize economic opportunities across all population sectors.
- Travel & Tourism, which is often built on the natural beauty or unique offerings of a culture, can have a long-term social effect on the psychological health of a community and the pride of its people.

- Travel & Tourism can be a direct force for social good. The International Tourism Partnership offers an example of such good works through its Youth Career Initiative, in which Carlson is a participant.<sup>6</sup> This program currently helps open new doors in the industry for at-risk youth. Programs range from life skills preparation to highly skilled management training.
- The training provided to T&T employees constitutes transferable knowledge that can be used in most other employment situations.
- Intercultural awareness and personal friendships fostered through Travel & Tourism are a powerful mediating force against conflict, and can contribute to international understanding.

#### The building of compassionate connections

The in-house resources of global tourism companies have been invaluable to the survival and reconstruction of communities and lives after recent natural disasters. Beyond their moral engagement, T&T companies will always have a economic self-interest in assisting disaster-struck areas to which they have an economic link. For example, Hurricane Katrina in the United States, along with the December 2005 South Asia Tsunami, resulted in many T&T associations and companies coming together to provide shelter, transportation, food, and aid. It is likely to remain the will and intent of the T&T industry to continue such aid in times of desperate need around the world.

#### Challenges

The preceding section proves that Travel & Tourism has made great strides in fulfilling its promise. It stands to offer more in the immediate future to developing economies; nonetheless, challenges to continued success do present themselves.

#### Security

The increased screening of travelers arising from the threat of violence has the potential to push some “casual travelers” out of the market; or at least to alter their traveling habits.

In business travel, this need has meant new services demanded by clients. Carlson Wagonlit Travel today successfully offers security information and services to its global client companies, who are seeking travel risk management programs and emergency readiness offerings for their employee-travelers.

New requirements by the United States regarding passports and entry identification, coupled with the new difficulties obtaining visas to travel to the United States, has certainly had a dampening effect on travel to that country. As a result, other destinations stand to benefit



from the redirection of travelers who might otherwise visit the United States.

### Public policy

Policy issues involving local government regulations, business regulations, and/or local custom can and do often impede growth of Travel & Tourism in both developed and developing nations. Slow movement on infrastructure issues—such as development of bridges and roads to allow development of tourism products—can be a major obstacle to development and progress. Likewise, lack of effective educational systems and sanitation facilities and processes can have a similar negative effect. Two examples out of many follow:

- Greece has enjoyed a growing awareness and benefits from a healthy T&T industry, but policy challenges remain. Excessive bureaucracy around permitting issues, foreign investment, and development issues prevent this Mediterranean oasis from fulfilling its potential in the industry. These artificial roadblocks are proving to be stronger than the country's natural appeal.<sup>7</sup>
- Trinidad and Tobago is lagging behind the growth of its Caribbean neighbors because roadblocks remain. Among them are improved air access, simplification of the investment process, a strategic plan for development, and communication to its citizens about the benefits of T&T employment.<sup>8</sup>

Besides impediments created by lawmakers, the indifference of lawmakers to the industry is an equal challenge to the long-term health of Travel & Tourism. These challenges can be found in every region.

In the United States, one measure that has been taken to raise the visibility of the industry (and in so doing, its power) is a new joint partnership between the Travel Business Roundtable (TBR) and the TIA. TBR's membership consists of a high-level list of travel industry chairmen and CEOs; TIA is the largest T&T industry association in the United States. In many respects the two organizations competed with each other for dominance with policymakers. But in June of 2005, TIA and TBR realized the greater power the groups would have working together, and they partnered to wield even greater influence among lawmakers.<sup>9</sup>

Corruption can also be an enormous barrier to successful T&T development, prohibiting many global companies from entering or further investing in a market. Excessive national and local taxation can pose another public policy challenge. Taxes assessed to visitors must be appropriate and not be seen as gouging visitors to allow a nation's T&T industry to flourish and expand.

### Finding, training, and keeping quality employees

Economies must continue to make the most of public campaigns, and strategic media relationships will continue to benefit an industry dependent upon quality products provided by quality employees. Through such campaigns and relationships the employee base can be made aware of the benefits of industry employment. Once employees are chosen and trained, the use of rewards and recognition programs to provide an incentive for continued high performance is important.

### Achieving gender parity

The decade between 1988 and 1997 saw a significant increase in the participation of women in the global T&T industry. This has always been a particularly important sector for women (46 percent of the workforce in Travel & Tourism are women) as their percentages of employment in most economies are higher than in the workforce in general.<sup>10</sup>

The numbers of women and their percentage of the T&T workforce vary greatly among economies—from 2 percent up to over 80 percent. Although there are few obvious regional trends, it would appear that in those economies where tourism is a more mature industry, women generally account for approximately 50 percent of the workforce.<sup>11</sup> However, it is clear across the industry that at the executive level there continues to be a dearth of women in top roles. A 1999 report by the United Nations Environment and Development UK Committee (UNED-UK) spotlights the work remaining to be done, particularly in economies where the T&T economy is in its early stages.<sup>12</sup>

### Overcoming perception of low wages

Wage and tipping issues remain a point of contention. Critics suggest that the wage structure of the hourly employee, coupled with the tipping practice, leads to encouragement of nonreported income and reduced tax benefits for the government, as well as lower economic status for those workers. T&T jobs are often incorrectly viewed as “hamburger-flipper” employment, but it is a fact that the T&T industry provides a better path for upward mobility than many other industries, and has resulted in executive positions and full careers for many who have begun at the lowest rungs of its ladder.

### Immigration issues

In addition, immigration remains a top issue. T&T industries (especially hotel and hospitality businesses) have long been a traditional entry point for immigrants seeking work. The industry provides steady employment, taxes, and socialization to newcomers. Immigrant labor is a mainstay of the industry, and yet pending immigrant legislation in some economies could decrease or eliminate this labor pool.

## Opportunities

In industries of exploding growth, opportunities typically abound for the ingenious. The advantage for economies currently developing their T&T business is that many of the opportunities have already been developed and piloted in developed regions. Following are some opportunities that could prove eminently successful wherever they are practiced.

### Sharing best practices

The development of T&T destinations benefits as much from industry best practices as it does from the unique offerings of the destination itself. Continuing communication across borders and industries can help ensure a growing industry that will benefit from previous experience and processes.

Examples of this cross-industry benefit range from subregional groups (such as the Black Hills, Badlands & Lakes Association served by Carlson) to the Fiji Tourism Forum (a multi-country tourism organization). The sharing of best practices helps all ensure the best-quality products for the demanding 21st-century customer, and such sharing can enhance the image and offerings of an entire nation or region, proving to be beneficial to everyone.

### Building public-private partnerships

In the face of resource reductions and increased demands on government, many private-sector industry leaders are finding opportunities to expand business by forming working partnerships with governmental agencies and even nongovernmental organizations (NGOs). In doing so, the private sector benefits while working with historically adversarial entities to overcome perceived barriers.

Private investment in local communities can take the form of financial or in-kind investment, ranging from learning programs and employee volunteer programs to the creation of local businesses to support the needs of the investor. Public-private partnerships can be formed to address social issues that will have an effect on the area's success (gender parity, corporate social responsibility, and trafficking, both mentioned below, are three such issues).

### Practicing corporate social responsibility

Today's business leaders understand that improving the common good is a core responsibility of global business today. Far more than merely providing lip service to this concept, companies that understand and embrace corporate social responsibility (CSR) have made it an integral part of the culture and core business principles.

T&T leaders have a unique opportunity to impact the customer and the host community and its people, as well as their own employees. And being a good corporate

citizen does not mean exchanging good business for good deeds. Addressing the common good must also reflect business competitiveness. The two are not mutually exclusive—rather, they are mutually beneficial.

By way of example, Rezidor hotel group (a partner of Carlson) has put in place a *Responsible Business* program with policies, objectives and benchmarking indicators.<sup>13</sup> The company has equipped its hotels and general managers with tools to better manage their local cultural heritage, to become involved in their communities, to provide for employee well-being, to look out for children's rights, health and safety, and to monitor and enhance environmental performance.

More focused forms of involvement are also critical when immediacy is needed. For example, Carlson has partnered with the World Heritage Foundation to preserve cultural sites in China now in danger of destruction by ever-increasing numbers of visitors.

These types of public-private partnerships will be key to the continuing good health of the resources and communities upon which T&T companies depend.

### Fighting child sex trafficking

Child sex trafficking is a problem that plagues virtually every corner of the globe in some form or another. Unfortunately, it has become an unwelcome “niche market” for a small segment of travelers. It has also become an opportunity for Travel & Tourism to have a great impact on a horrific problem.

It is estimated that 2 million children around the world are subject to sexual exploitation each and every year.<sup>14</sup> The issues involved can range from prostitution involving kidnapping and trafficking of young girls and boys, to developed child sex tourism businesses. Child trafficking is the third largest organized criminal activity in the world, behind illegal arms trading and drug trafficking.

To that end, Carlson has developed a public-private approach to finding a solution to the problem. In March 2004 the company signed the ECPAT Code of Conduct for the Protection of Children from Sexual Exploitation in Travel and Tourism,<sup>15</sup> and made firm its commitment to conduct its operations according to the Code and to require partners and suppliers also to do so. The company has created a training program for its hotel employees to support the effort and has helped heighten public awareness of the issue.

To attack the problem on a different front, Carlson also became a founding sponsor of the World Childhood Foundation (WCF), whose mission is to help children and young women who are at risk of exploitation.<sup>16</sup> By helping vulnerable youth to gain employable skills and build healthy relationships, the WCF sets them on the road to a new life.

## Industry outlook

The future looks bright for the T&T industry.

The UNWTO projects that 2007 will be fourth year of sustained growth for the global industry.<sup>17</sup> Growth is expected to continue in 2007 at a pace of around 4 percent worldwide. Most importantly, world tourism demand is showing resilience against external factors. Even in the wake of terrorist attacks, wars, and political unrest around the world, the UNWTO reports that international tourist arrivals totaled 578 million worldwide, up 4.5 percent, up from the same period in 2005—a year that saw an all-time record number of international travelers.

In addition, the short-term outlook remains very positive, especially against the background of a strong world economy. Favorable exchange rates continue to encourage European and Asian travelers. International tourism is likely to remain buoyant unless major incidents occur.

The UNWTO projects a slow but steady growth for the industry through the year 2020. Experts estimate that the industry will see an average growth of approximately 4 percent per year through the year 2020. And although untouched T&T destinations will continue to emerge, the industry can likely avoid potentially dangerous fluctuations and should enjoy steady, sustainable growth.

## Coda

Travel & Tourism has accomplished much, and it still holds much promise for the world. But, as always, it is up to individual people to seize and derive benefit from that promise and fulfill their individual responsibility.

The governments and destinations that will win tomorrow will have an identifiable strategy; they will seek out the barriers to tourism and address them. They will form partnerships with industry leaders to prepare the citizenry and infrastructure as required. They will quickly counteract inaccurate media images that discourage visitors.

Our industry is a gathering of people bound by causes both economic and societal. We who commit our lives to this industry do so in order to make a profit for our companies and their owners, and for ourselves. But we make this commitment also because we desire to contribute positively to bring the world closer together—so that jobs can be created in communities around the world, so that those communities can have clean water and good schools, so that disaster victims can get food and clothing, so that grandparents live to become old and see their children and their children's children thrive. We do it so that families in developing nations can afford not to sell their children into slavery, and so that restless teenagers can find work that takes them off the street and gives them pride and hope.

We believe it is our responsibility to use our power, our leadership skills, and our human network to accomplish these goals through the industry we love.

## Notes

- 1 Taken from a speech to The Royal Institute for Public Affairs, Chatham House, United Kingdom, October 24, 2006.
- 2 See WTTC (2006).
- 3 See WTTC (2006).
- 4 See the Travel Industry Association of America (TIA) website at [www.tia.org](http://www.tia.org) (accessed 11/01/06). This website includes information from the US Department of Commerce Office of Travel and Tourism Industries, World Tourism Organization. 2004 preliminary data, updated April 2005.
- 5 See UNWTO (2006a).
- 6 International Tourism Partnership. Available at [www.tourismpartnership.org](http://www.tourismpartnership.org) (accessed 12/06/06).
- 7 See WTTC (2006).
- 8 See WTTC (2006).
- 9 See WTTC (2006).
- 10 United Nations, UN Millenium Development Goals project. Available at [www.un.org/millenniumgoals/](http://www.un.org/millenniumgoals/) (accessed 11/01/06).
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- 12 United Nations, [www.un.org](http://www.un.org) (accessed 10/15/06).
- 13 The Rezidor Hotel Group, [www.rezidor.com](http://www.rezidor.com) (accessed 11/28/06).
- 14 UNICEF, [www.unicef.org](http://www.unicef.org) (accessed 06/01/06).
- 15 Code of Conduct for the Protection of Children from Sexual Exploitation in Travel and Tourism (The Code). Available at [www.thecode.org](http://www.thecode.org) (accessed 06/01/06).
- 16 World Childhood Foundation, [www.childhood.org](http://www.childhood.org) (accessed 06/01/06).
- 17 See UNWTO (2006b).

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## Electronic Payments: A Catalyst for Tourism and Economic Growth

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Not only is tourism one of the world's most robust industries, it is also one of the most democratic. It offers the potential for wealth creation not just for the most advanced economies, but also for emerging and even struggling economies.

According to the UN World Tourism Organization, tourism is one of the world's largest industries and the largest service sector. Moreover, in the past decade tourism grew in the world's poorest 49 countries at a rate six times that of Europe.

Over the past half-century, the growth in tourism has been nothing less than spectacular. In 1950, about 25 million people traveled every year. Today, more than 800 million do.<sup>1</sup> That is 32 times as many people spreading wealth and generating economic growth—much of it in countries that need it the most.

The pace of growth is only expected to pick up. World airline carriers transported 1.9 billion passengers in 2004, up 11.6 percent. The United States alone is on track for more than a billion passengers flying its skies by 2015—up from 700 million in 2005. Looking even further down the road, the U.S. Department of Transportation is anticipating a doubling or even tripling of demand over the next 20 years.<sup>2</sup>

There are a number of reasons for the surge in tourism: the growth of a prosperous and mobile middle-class in the developed world, improved and inexpensive transportation and technologies, improved communications technologies that heighten awareness of the wider world among peoples of developed countries, improved infrastructure, and the emergence of a large educated population seeking to learn more about other people and places.

But, undoubtedly, one of the most important catalysts to global tourism has been the development and growth of electronic payments.<sup>3</sup> No longer is the need to carry large amounts of cash a disincentive to travel. This factor is only beginning to show its true potential impact. In fact, the future opportunities for electronic payments are enormous, especially in less-developed economies that have not yet seen the type of growth that such payment systems have experienced in advanced economies.

The World Bank succinctly summed up the importance of modern payment systems to emerging economies when it said:

Effective and efficient payment systems are vital for the economic development of emerging countries... to promote the development of commerce, enhance economic policy oversight, reduce the financial, capital, and human resources devoted to the transfer of payments and control the risk inherent in moving large values.<sup>4</sup>

The World Bank's position provides a macro level view of the value of electronic payments to emerging

economies. But it is important to isolate some of the trees from the forest. Consider one less-developed economy, Ethiopia. According to the general manager of Ethiopian Quadrants PLC, “[i]f credit card acceptance was more widespread [in Ethiopia] and each visitor spent an additional US\$100, it would mean an extra US\$22 million a year income for the country.”<sup>5</sup> In an economy the size of Ethiopia’s (US\$8.8 billion GDP, US\$900 GDP per capita), US\$22 million a year would have significant impact. In fact, on a comparative GDP basis, it would be the equivalent of over US\$3 billion in the United States.<sup>6</sup>

This paper puts forward the importance of tourism as a key driver of economic growth, particularly for developing and less-developed economies. It also describes the value of electronic payments as a way of driving economic growth, particularly through increased tourism. And it recognizes that economic growth is not the only benefit conferred by Travel & Tourism. As the UN World Tourism Organization points out, tourism enriches the world in many ways. It promotes growth, increases trade, and advances development. It also strengthens communities, improves people’s lives and, by bringing together people from diverse lands and backgrounds, advances the goals of peace and global understanding.<sup>7</sup>

Travel & Tourism links people together, by helping them to share their culture, language, history and landmarks. In the words of US Secretary of State Condoleezza Rice:

When you can look a person in the eye as you have a conversation, when you can see the people and the places of foreign countries first-hand, you gain a sense of intimacy and knowledge that does not come from a phone call or in an email... Traveling to another country breaks down stereotypes, and makes people quicker to listen and slower to judge. The knowledge and experience that citizens gain through their private travels are vital for the cause of diplomacy and international understanding in the 21st century.<sup>8</sup>

Unfortunately, like most important objectives, increasing tourism also has significant challenges. For that reason, this paper offers an overview of some of the critical challenges facing the growth of the T&T industry, especially in developing and less-developed economies—challenges that include poor communications and transportation infrastructure, legal uncertainties over ownership, high taxes, and bureaucratic obstacles to business.

But it is not enough to state the opportunity and describe the problem. This paper will also put forward some broad approaches that can be taken to increase global T&T spending, as well as improve the access of developing and less-developed economies to this important source of wealth creation and growth. These approaches include potential government actions, the

need for public and private organizations to act in partnership, the importance of the development of mobile commerce for all economies, and—perhaps most importantly—the need to shape a new mindset (in both government and the private sector), one that recognizes the true value of tourism as a spur to development, as well as the need to ensure that all people have the opportunity to benefit from it.

In this paper, Visa also brings its own expertise to bear as the world’s leading electronic payments company, describing the enormous potential of electronic payments as a driver of economic development and an enabler of tourism growth, particularly in developing and less-developed economies. In that regard, we have only begun to see the economic opportunities that electronic payments can spawn—opportunities that will grow dramatically with the introduction and application of new technologies, such as mobile commerce. This is a major asset in particular for economies lacking the advanced telecommunications and physical infrastructure that have been important building blocks for growth in advanced economies.

Underlying this analysis and recommendation is recognition that changes in our world, especially advancements in technology, are creating opportunities for developing and less-developed countries. In the words of C.K. Prahalad, expert in developing markets and author of *The Fortune at the Bottom of the Pyramid*, “If we stop thinking of the poor as victims or as a burden and start recognizing them as resilient and creative entrepreneurs and value-conscious consumers, a whole new world of opportunity will open up.”<sup>9</sup>

One of the purposes of this paper is to show how governments, the private sector, and the people of developing and less-developed countries can indeed take advantage of these opportunities.

### Tourism and economic growth in the developing world

It was during the summer between his first and second years at Harvard Business School that Ashwin Damera got the idea of starting up a business in the travel industry in his native India. Working at JetBlue, the successful US low-cost airline, it is only natural that Damera’s first impulse was to start a no-frills airline to facilitate travel for India’s burgeoning middle-class. But he realized that the budget airline space was quickly filling up in that country. And red tape made it a hard field for a young entrepreneur to enter. So where did he turn? The Internet—where economic democracy is at work. No government approvals were required.

In January 2006, Damera established Travelguru, a budget travel service that offers consumers the opportunity to compare prices among different air carriers and choose from among a range of hotels. Today about 20,000 people visit the site every day, buying about 500 airline tickets or hotels worth about US\$25,000.



Damera was not the first to recognize the potential in India for an Internet-based travel firm. By the time Travelguru opened up, Deep Kalra had already founded MakeMyTrip.com, which sells 2,500 airline tickets a day—about 80 percent of which are for domestic travel.<sup>10</sup>

The lesson? The combination of increased demand in Travel & Tourism, combined with new communications technologies, helps facilitate significant economic growth in developing countries. And electronic payments—which can be made over the Internet—are critical to making the formula work.

These factors can also help stimulate economic activity in less-developed economies. In Ethiopia, tourist arrivals since the end of the 1998–2000 war with Eritrea have grown by an annual average of 15 percent. According to the World Bank report, the percentage of vacation tourists has increased by over 180 percent.<sup>11</sup>

More than ever, tourism represents a gateway to economic progress and prospects for increased personal dignity and a better life for people around the world. Tourism is now well recognized as a key to bringing wealth and experience from the richest countries to the poorest ones—especially as it increasingly interacts with advanced information technologies. In fact, the UN World Tourism Organization has cited tourism as an important factor in achieving the UN's Millennium Development Goals.

It is easy to see why. Tourism is bigger than the automotive, agriculture, and electronics sectors—representing 6 percent of total world trade and 40 percent of trade in services. It generates trillions of dollars in global GDP, hundreds of millions of jobs, massive exports and investment—and a significant degree of resilience to economic crises and natural disasters.<sup>12</sup>

After three years of stagnant growth, no doubt largely attributable to concerns about terrorism and SARS, international tourism experienced a rebound in 2004, with the large majority of destinations reporting positive results. In particular, the Asia Pacific region experienced a strong rebound after the SARS-induced setbacks suffered in 2003, with the recovery of the world economy (especially the economic generators, the United States and Europe, as well as Asia itself). Direct international tourist spending now stands at US\$800 billion a year—more than US\$2 billion a day; it is expected to double by 2020.<sup>13</sup>

Tourism also helps create jobs directly (in such industries as transport, hospitality, and travel firms); indirectly (agriculture and manufacturing); and induced (roads, services, and utilities). World T&T employment is currently estimated at 234 million jobs, 8.7 percent of total employment.<sup>14</sup> Most encouragingly, the benefits of job creation fall disproportionately to developing and less-developed economies. Consider the top 10 countries benefiting from job creation through tourism. Only two of the 10 can be classified as developed economies (the

United States in 7th place and Spain in 9th). Five are developing economies (1st place is China, 2nd is Indonesia, 3rd is Mexico, 4th is India, and 6th is Brazil). One is an economy in transition (the countries of the former Soviet Union, in 5th place), and two are less-developed economies (8th place is Bangladesh and 10th is Pakistan.)<sup>15</sup>

The unique value of tourism to emerging markets is easy to see. Over the past decade, tourism grew in the world's 49 poorest countries at a rate six times faster than Europe. In fact, tourism grew at a rate of 6–8 percent a year collectively in China, India, Africa, and the Middle East, compared with 3–5 percent in Europe and the United States. Tourism transfers wealth, technology and skills to emerging economies.<sup>16</sup>

Tourism expenditures and the export and import of related goods and services generate income in the host country and can stimulate the investment necessary to finance growth in other economic sectors. In fact, international tourism is one of the top five export categories for as many as 83 percent of countries, and is a leading source of foreign exchange for at least 38 percent of countries.<sup>17</sup>

The statistics paint a promising picture—a picture of opportunity. But filling that picture out requires encouraging people to travel and help stimulate wealth creation. In doing so, one of the greatest boons to Travel & Tourism in recent years has been the development of electronic payments.

### Economic benefits of electronic payments

The widespread adoption of electronic payments has significantly expanded the sales volume of goods and services, reduced barriers to immediate credit and liquidity, and eased geographic restrictions to trade and exchange. And, pertinent to the subject of this paper, electronic payments promote travel & Tourism by providing travelers with a form of exchange that is ubiquitous, secure, reliable, and convenient.

When considering the value of these qualities as a driver of tourism, it is worth taking into consideration the assessment of Deep Kalra, founder of makemytrip.com, who attributes part of the success of his budget travel website in India to the wide use of credit cards in that country. “E-commerce in India has better infrastructure because of wider use of credit cards,” he says.<sup>18</sup>

Tony Hickey, general manager of Ethiopian Quadrants PLC, in a summer 2006 speech, described the growing strengths of Ethiopia's tourism industry. But he did not ignore its weaknesses. In particular, he cited the “limited acceptance of credit cards.” In his words, “Ethiopia loses money each year because visitors are unable to spend money. I am talking about the limited acceptance of credit cards, in an age where travelers do not carry wads of cash with them... I believe that



tourist class hotels should be obliged to accept credit cards.”<sup>19</sup>

During the same speech, Hickey referenced how, on one occasion, he was awakened by a friend with a pressing problem. The hotel his friend was staying at would not allow him to settle his bill with a payment card. As a result, Hickey had to provide a guarantee of payment for his friend’s account.

Indeed, Hickey estimates that more extensive acceptance of electronic payment cards in Ethiopia would be worth an additional US\$22 million a year to Ethiopia. This estimate is not surprising. History demonstrates a compelling need to standardize payment forms to enhance their utility. Examples are as ancient as the Qin Dynasty in China (221–207 BC) when the Emperor unified three or four forms of currency into one coin, and as contemporary as the creation of the euro in the 21st century.

The development of money does not depend solely on objective characteristics. Subjective evaluations play a critical role. Ultimately, consumers determine what form of money is most desirable. People simply substitute cheaper and more convenient forms of money for expensive and inconvenient forms. It is through this substitution that new money forms embed themselves in the marketplace.

Over the past 5,000 years of human history, we’ve seen the currency of commerce evolve: from barter to coins, to payment by paper, to check. This development has been driven by an overwhelming marketplace preference for increased convenience and efficiency, and for decreased risk and cost. The modern payment card is an example of this organic, socially driven growth—the creation of new forms of exchange that continue to make life easier and more efficient. So long as the human condition continues to change, payment systems will continue to evolve, driven by powerful market forces.

The advantages of electronic payment as a boon to Travel & Tourism are easy to see. For consumers, electronic payment cards—compared with cash and checks—offer the convenience of global acceptance, enhanced security and reduced liability in the event of loss or theft, immediate access to funds, as well as access to credit. For merchants, electronic payments offer the advantages of speed and security in transaction processing; freedom from the costly labor, materials, and accounting services required in paper-based processing; better management of cash flow, inventory, and financial planning; cost and risk savings due to the elimination of the need to run an in-house credit facility; and, perhaps most importantly, the incremental increase in purchasing power on the part of the consumer. Moreover, electronic systems are able to provide a higher level of choice and customization because the underlying system is capable of producing multiple offerings utilizing the same operational capital.

Among the many forms of electronic payment choices Visa offers, it is worth considering some examples of products that can help stimulate T&T spending.

One of the challenges facing small businesses in tourist destinations has been the traditional lack of credit payment options for small-ticket purchases. Visa has been addressing this problem through the introduction of a small-ticket option for businesses that depend on fast turnover—such as quick-service restaurants, coffee shops, and newsstands. The service applies equally well to low-cost souvenir shops, poolside snack bars, and outdoor food stands.

Small-ticket outlets will be further assisted by contactless cards, which are valuable in outlets where swiping prohibitively slows down speed at the point of sale. Perhaps more importantly, contactless payments have applications beyond cards. The technology can be customized to key fobs and mobile phones, and can improve the transmission of enhanced data. (This paper discusses mobile technologies in more detail in a later section).

At a macro level, the effect of electronic credit payment systems is to increase the money supply and reduce constraints on spending. Economies depend upon efficient payments. In Canada, economic analysis revealed that electronic payments contributed \$107 billion (Canadian) toward a total \$437 billion of economic growth in the Canadian economy between 1980 and 2000.<sup>20</sup>

In many ways, the economic impact of introducing electronic payments is akin to using the gears on a bicycle. Add an efficient electronic payments system to an economy, and you kick it into higher gear. Add well-managed consumer and business credit, and you notch up economic velocity even further.

### **Tourism: Challenges facing developing economies**

The opportunities for promoting the growth of tourism are clear; as are the advantages to local economies. The high propensity to create wealth in diverse economic sectors—and to distribute it among all strata of the population—has been one of tourism’s most compelling attractions. It has led governments and economists of developing countries to adopt it as a focal sector for diversifying their economies, which have often historically depended on producing primary raw materials. It generates high-paying jobs across the spectrum. And intensive central investment in tourism facilities has the indirect effect of creating opportunities for the sustainable development of hundreds of small- and medium-sized ancillary businesses, which are not capital-intensive, in a variety of fields.

For developing economies, tourism can truly be a rising tide, lifting all boats. But too often, such economies fail to catch the tide. Too often, local conditions inhibit growth—including the growth of tourism. For instance,

transportation infrastructure and utilities are often inadequate, unable to effectively facilitate tourist travel or encourage spending. Likewise, robust financial systems are also often markedly absent or lacking, with constricted access to financing for both merchants and consumers, as well as a dearth of access points for tourists to withdraw cash, and limited telecommunications infrastructure to support electronic payments.

In addition there are often legal uncertainties over ownership, discouraging the level of investment necessary to draw tourists, ensure a pleasant stay, or encourage maximum tourist spending. High taxes and bureaucratic obstacles to business also deter investment and discourage potential entrepreneurs from starting businesses aimed at attracting tourists, meeting their needs, and encouraging them to spend. A lack of training support makes it difficult for many tourist businesses to ensure the supply of workers necessary, and diminishes the service capacity of the industry in various countries—in turn making it difficult to attract tourists, provide for their service, and encourage return trips.

Moreover the T&T industries of developing economies often suffer from disasters—such as tsunamis, health crises such as SARS, and terrorism—as well as economic turbulence. In the wake of triple bomb attacks that wrecked the Red Sea resort city of Sharm El-Sheikh, for example, the director-general of the Egyptian Federation of Chambers of Commerce estimated a 90 percent cancellation rate among booked arrivals.<sup>21</sup> In the aftermath of the 2005 Bali bombings, arrivals of foreign and domestic tourists dropped in half.

Consider also the impact of the 2004 Boxing Day Tsunami on the economic health of Thailand's tourist industry. Thailand had some significant advantages in dealing with the tsunami shock. The country had a highly developed infrastructure, most of which remained in place in the face of the tsunami. Phuket airport, for example, was closed for only about half an hour.<sup>22</sup> Medical facilities appeared sound, public health impacts were relatively minor, and adequate shelter remained in place.<sup>23</sup>

Nonetheless, Thailand had a difficult time dealing with the tourist concerns spawned by the tsunami. Going into the 2004 Christmas holiday season, the country had been enjoying years of tourism growth. The number of visitors each January had been steadily increasing, almost doubling since 1998—from 650,000 to more than 1.2 million.<sup>24</sup> But, in the wake of the tsunami, the visitor total dropped dramatically in January 2005, by about one-third—to 800,000. Moreover, the decline was seen not just in regions where significant damage was experienced (such as Phang Nga) but also in locales like Phuket, which suffered relatively minor damage.<sup>25</sup>

### Leapfrogging ahead with mobile technology

One of the biggest historic challenges has been the lack of adequate telecommunications infrastructure—the highways of information—a lack that has undermined efforts to introduce electronic payments and the advantages they bring. This infrastructure deficit has posed a significant challenge to the tourism industry in developing economies. With a shortage of these information avenues that break down communication and commercial barriers, tourists traveling to the developing world might have a difficult time accessing pay-phones, finding ATM portals, or making automated electronic payments to local retail vendors.

Recently we have seen reason for optimism. Merchants and consumers are both able to use mobile technology to facilitate payments, turning a simple mobile phone into a point-of-sale device. This is a major breakthrough for developing countries, which are leapfrogging beyond landlines and heading straight toward wireless communications. In Asia there were about as many mobile phones as landline telephones in 2003. In 2006, there were 1.5 times as many mobile phones. In 2008, mobile phones in Asia will actually exceed the population of the continent. The number of mobile phones in Africa will be just short of the total population.<sup>26</sup>

By 2008, the Asia-Pacific Region will likely experience a 30 percent regional mobile penetration rate.<sup>27</sup> Africa is also expected to benefit from a significant explosion of mobile technology. It is expected that by 2008, Africa will experience a mobile penetration rate of nearly 20 percent.<sup>28</sup> The fact that there are two billion mobile phone users worldwide—equal to one-third of the global population—is indicative of the emergence of wireless technology in developing countries.<sup>29</sup> Mobile phone users make up twice the population of Internet and personal computer users combined.<sup>30</sup> The increasingly ubiquitous availability of mobile telephone technology is opening new opportunities for tourism-related commerce.

The rapid development of new technologies, especially those relating to mobile networks and mobile devices, is creating opportunities to advance efficiencies in electronic payments and better serve new markets and merchant segments. Where a street vendor in Bangalore may have previously been limited to cash payments, new innovations—such as turning a mobile phone into a payment terminal—are making it possible for him to be part of the connected, real-time, electronic payments world.

For example, a mobile phone designed for merchants with a secure integrated adaptor that accepts both magnetic stripe and chip cards merges low-cost and widespread GSM/GPRS mobile phone technology with the capabilities of a point-of-sale terminal, bringing electronic payments to nontraditional locations and merchant categories. One of the target markets is China,

where the government and banks are planning to increase merchant terminal locations from 3 percent to 30 percent in time for the 2008 Beijing Olympics.

Mobile message-based payments are also expanding the choice of payment available to consumers and merchants alike. In India, Visa has joined with the State Bank of India to trial a mobile payments system using text messaging technology. The platform is called *mChq*, and it enables both merchants and consumers to use their mobile devices to conduct payment transactions.

Instead of presenting a card, a customer provides a mobile phone number or secure identity code, which the merchant uses to send a text message requesting payment with the transaction amount and other purchase details. Once the customer confirms the transaction by keying in a personal identification number (PIN), the merchant is sent an authorization message that is recorded and stored on the cards of both merchant and customer as receipts. The *mChq* platform does not require the merchant to have a conventional acceptance terminal, which means that this technology offers electronic payment access to new merchant sectors, such as healthcare providers, taxis, couriers, street vendors, and electricians.

Similarly, around the globe and in areas where email is inaccessible, individuals are using the Short Message Service (SMS) to enable the exchange of text messages between mobile phones. This technology presents a significant opportunity for global tourism, particularly in developing economies where the cost of a single SMS message amounts to merely 1–3 cents (USD).<sup>31</sup>

SMS technology can transform the mobile phone into a digital wallet, capable of bridging the physical point of sale with the electronic point of sale. For example, a partnership established between software engineers, telecom companies, and banks has resulted in cost-effective electronic transfers of currency. In the Philippines, GlobeTelecom provides 13 million subscribers with access to a mobile-wallet platform designed by Utiba, an Australian software company.<sup>33</sup> Subscribers use their mobile phones to transfer money person-to-person, receive domestic transfer funds, and obtain remittances from international sources. Moreover, these subscribers do not require bank accounts.

Such mobile-wallet technology will expand tourism in developing countries by improving the ability to facilitate electronic transactions in locations that were once remote. Tourists ranging from high-school backpackers to high-flying business executives will find this technology affordable and accessible. The technology will reduce the difficulty of handling and exchanging unfamiliar currency for travelers who are on trips involving a single or multiple destinations. Moreover, it will ease the difficulty of engaging local merchants who were previously unable to process electronic transactions. With the simple use of a mobile phone keypad, tourists will find it easier to transcend language barriers and

unfamiliar currency to purchase goods and services from the smallest street vendors. This will allow the tourist to gain a better appreciation for the country of destination because it allows increased interaction with local merchants. At the same time, developing economies will get a boost from the ground up, as tourists will be empowered to explore the shops and stalls of countless small businesses and vendors in some of the most remote markets throughout the globe.

This technology will enable even the most adventurous tourists to utilize more efficient means of commercial transactions. Tourists hiking the Himalayas or embarking on a safari in the Sahara will be able to use mobile phones to pay their tour guides electronically.

### **Support for Travel & Tourism: Roles for government and the private sector**

Due to the type of economic, social, and cultural benefits that can be derived from Travel & Tourism, the responsibility of growing individual T&T markets no longer falls to government initiatives alone. Instead there is a distinct role for both the public and private sector.

Of course, it is important to recognize that there are some things that only governments can provide—like the type of reasonable taxation and ownership laws and regulations needed to inspire a healthy competitive environment. Likewise, policies specifically designed to assist small businesses and encourage start-ups are equally valuable. And it is also important that governments remove some of the more physical roadblocks, such as overburdened airports and inadequate road systems. At the end of the day, governments must recognize that they need to invest to get a return.

There are also a number of steps that the industry itself can take. For instance, it is important to continually keep abreast of changing consumer preferences and increase consumer choice. The industry needs to consider ways to improve the quality of tourism products and services by addressing the consumer's desire for more products and services to be customized to their needs, tastes, and preferences.

At the same time, industry standardization and best practices can provide a benchmark with which to improve customer satisfaction, while also improving the quality of services, industry skills, and staff.

As stated, the benefits of expanded Travel & Tourism flow to both the private sector and government. This means that, in some areas, the responsibility of ensuring the health of the industry also rests with both parties. In some cases this can mean the two sectors working directly together for the betterment of the cause.

Take, for instance, one of the biggest roadblocks to growing Travel & Tourism. In the developing and less-developed world, merchants often find it virtually impossible to obtain credit. Aspiring entrepreneurs seeking to access capital run up against the fact that, in

many countries, information about a business or individual's credit track record is simply unavailable. This makes it difficult, if not impossible, to borrow money. And it can result in higher interest rates to offset the higher risk.

In order to help bridge this gap, Visa has been working with the International Finance Corporation (the private sector arm of the World Bank)—in cooperation with governments—to set up and improve credit bureaus in more than 10 countries. By reducing risk, the initiative can increase access to financial services; something that is good for the merchant's business and good for the economy.

Of course one of the most important activities that governments and the private sector can each undertake is promotion and marketing, because it can benefit countries and regions as a whole, as well as the bottom lines of individual organizations. However, as the very medium of promotional marketing evolves, so too must the tactical programs that the public and private sector initiate. It is no longer effective to operate marketing programs in a silo. Instead, today's collaborative environment offers endless possibilities to extend reach in a highly targeted way. For instance, nationally hosted events such as the Olympic Games and the Rugby World Cup offer tremendous opportunity to leverage private sector sponsorships, investment, and marketing initiatives that drive tourists to the host country long past the actual event.

Likewise a cross-regional approach to marketing key destinations through tactical marketing activities aimed at tourists from just one source market can yield significant results because the firepower is directed toward where it will generate the most results. This type of work can easily be done on the industry-side, with government endorsement, when the organization involved is in one or more markets. Visa has initiated its own cross-regional marketing program in support of its own T&T efforts.

Of course, one of the most effective forms of marketing is probably word of mouth. And in today's world of technology-enabled peer-to-peer communication, this fact should never be underestimated. As new media such as community chat boards and blogs dethrone traditional travel information sources such as paid advertisements and journalist commentary, the travel industry needs to be able to respond to consumer demand for "real" recommendations. This means not only revising current marketing strategies to accommodate new communication mediums and styles, but also ensuring that industry employees—especially those dealing directly with the traveling public—are well-trained and motivated.

## Conclusion

In a world characterized by dramatic improvements in transportation and communications, tourism offers

enormous potential as a vehicle of economic growth and advancement. Travel can encourage investment, create jobs, raise living standards, and generate government revenue. But what one gets out of any investment depends to a great extent on what one puts into it. Transportation infrastructure, telecommunications infrastructure, marketing initiatives, and access to electronic payments are among the factors critical to tourism growth.

Tourism can also bring people closer together, and help shape shared perspectives across borders and oceans. In the words of the enlightenment thinker Montesquieu:

The natural effect of commerce is to lead to peace. Two nations that trade with each other become reciprocally dependent; if one has an interest in buying, the other has an interest in selling, and all unions are founded on mutual needs<sup>33</sup>... The history of commerce is that of communication among peoples.<sup>34</sup>

But in order for this concept to work within the context of Travel & Tourism, it is important to recognize that the trade between the hotelier and the tourist, or the street vendor and the tourist, needs a standardized form of payment that is mutually acceptable and provides a rewarding experience to both parties. This is where electronic payments come into play. Payment cards and other electronic payment enablers are ubiquitous, secure, reliable, and convenient. They make it easier for people to conduct businesses. They make it easier to travel.

## Notes

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- 2 Remarks by former US Secretary of Transportation, April 8–10, 2005, Global Travel and Tourism Summit, 2005, New Delhi, India.
- 3 For the purposes of this paper, the term *electronic payment* refers to all card-based transactions (credit, debit, prepaid, and commercial).
- 4 Listfield and Monte-Nigret, August 31, 1994, *Modernizing Payment Systems in Emerging Economies*, World Bank.
- 5 All-Africa Media, *The Reporter*, July 29, 2006.
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- 7 UNWTO, *Tourism Enriches*, September 27, 2006.
- 8 Remarks by US Secretary of State Condoleezza Rice, April 10–12, 2006, Global Travel and Tourism Summit, 2006, Washington, DC.
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- 26 Celent, *Mobile Commerce: Dealing with the Devil in the Details*, February 2006,
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- 30 Celent, *Mobile Commerce: Dealing with the Devil in the Details*, February 2006, p. 3.
- 31 Celent, *Mobile Commerce: Dealing with the Devil in the Details*, February 2006, p. 25.
- 32 Celent, *Mobile Commerce: Dealing with the Devil in the Details*, February 2006, p. 54.
- 33 *Spirit of the Laws*, Book 20, Chapter 2, Montesquieu
- 34 *Spirit of the Laws*, Book 21, Chapter 5, Montesquieu

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## CHAPTER 1.7

# Investing in Air Transport Connectivity to Boost National Productivity and Economic Growth

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Economic growth is determined by the resources available to a nation in the form of labor, energy, materials, and past savings accumulated in its stock of capital, and in the productivity of those resources. Productivity can vary according to a number of factors, the most important of which are generally considered to be education, research and development (R&D), and the capital assets available to each worker. This paper looks at new evidence that the air transport network is one of those key capital assets that enhances productivity and, hence, “supply-side” economic growth.

## What is competitiveness?

*Competitiveness* is a widely used, and sometimes abused, term. In the context of a nation’s economic performance it is often used to mean the ability to succeed in trade “battles” on the international market place. Yet the evidence has been that trade is not a zero sum game, confirming the predictions of the theory of comparative, rather than competitive, advantage. Competition among nations will lead to specialization in those traded goods and services for which the country is relatively, but not absolutely, better. The United States still exports goods to China despite having labor costs many times the level of its trading partner. Both countries benefit from this trade. It is not like competition between companies on a specific market. If a business has higher costs or poorer quality than its competitor, it will go out of business, eventually. If a country finds higher costs leading to a persistent deficit in its trade in goods and services, its exchange rate will fall, eventually.

So in a world of relatively flexible exchange rates, the trade “competitiveness” described above of a nation’s businesses does little to drive economic growth and welfare in the sense of winning battles in the arena of international trade. If it is highly “competitive,” its exchange rate will rise, eliminating its advantage. If “uncompetitive,” its exchange rate will fall, pricing its traded goods and services back into international markets.

However, economic growth and living standards are driven very powerfully by a nation’s productivity. Knowledge, institutions, and assets that enable a nation to produce more from its own supply of labor, energy, materials, and past savings will directly raise living standards and economic growth. As the Conference Board of Canada put it, “productivity growth is the key to maintaining and improving living standards—it gives us the biggest bang for the buck.”<sup>1</sup>

The World Economic Forum’s Global Competitiveness Index provides an important perspective on a range of institutions and circumstances that drive a country’s productivity growth, particularly regarding the “friendliness” of the business environment.<sup>2</sup> The new Travel & Tourism Competitiveness Index (TTCI) featured in this *Report* uses that perspective to measure how “friendly” a country’s business, regulatory, and

natural environment is for the development of its Travel & Tourism (T&T) industry.

This is a key perspective, since tourism is an important generator of jobs and incomes in many countries. However, a country's air transport network, which is included in the TTCI, is also important to the productivity of its wider business sector. It is an infrastructure asset connecting a country's businesses to global markets and sources of inputs and ideas. Air transport does not just bring tourists into a country. It also takes business travelers to meet existing and new customers, expands markets, and generates economies of scale and scope. It enables businesses to access the best sources of supply around the world for high value-added materials, components, skills, and ideas. It is this feature of a country's air transport network that offers the potential for boosting national productivity, economic growth, and living standards.

### Measuring connectivity

We measure the quality of a country's air transport network by its "connectivity" from the point of view of its businesses. This connectivity is defined as the scope of access between an individual airport or country and the global air transport network. It is a measure of the number and economic importance of the destinations served, the frequency of service to each destination, and the number of onward connections available from each destination. Connectivity increases as the range of destinations and/or frequency of service increases.

The International Air Transport Association (IATA) has used data from the SRS Analyser airline schedule database to construct a time-series indicator of the connectivity of a country's key airports to the global air transport network. The connectivity indicator measures the number of available seats to a particular destination in a certain period (the first week of July for each year from 1995 to 2005). It then weights the number of available seats by the size of the destination airport (in terms of number of passengers handled in each year). This provides a proxy estimate of both the range and economic importance of the destinations, the frequency of service, and the number of onward connections available.

For example, Atlanta airport, as the world's largest airport, is given a weighting of 1. Paris CDG airport, which handles 61 percent of the number of passengers handled by Atlanta, is given a weighting of 0.61. Therefore, if an airport has 1,000 seats available to Atlanta it is given a weighted total of 1,000. But if it also has 1,000 seats available to Paris CDG, these are only given a weighted total of 610. The weighted totals are then summed for all destinations (and divided by a scalar factor of 1,000) to determine the connectivity indicator.

The connectivity indicator is therefore calculated as:

$$\frac{(\text{number of destinations} \times \text{frequency} \times \text{seats per flight}) \text{ weighted by the size of the destination airport}}{\text{scalar factor of 1,000}}$$

A higher figure for the connectivity indicator denotes a greater degree of access to the global air transport network. Using this indicator, Table 1 shows the importance of not just serving a large number of destinations, but serving those destinations that have a large economic importance and the ability to access a large number of onward connections for the business passenger. For example, in 2004 London Heathrow served only 55 percent more destinations than Copenhagen airport and just under four times as many destinations as Nairobi airport. But the larger number of major destinations served by Heathrow, the higher frequencies of the flights, and the greater connections it provides to the global network means that its measure of connectivity is nearly four times that of Copenhagen and twenty times that of Nairobi.

Of course the impact of this air transport infrastructure on a nation's economy will also depend upon the number and size of the businesses it is serving. Large economies will naturally have more destinations and available seats, but quantity is not a measure of quality. A given level of available seats and connectivity will provide a larger opportunity and stimulus to productivity if it is supporting a smaller rather than larger number of businesses. Ten new destinations to economically significant countries are likely to bring more benefit to the businesses served by Nairobi airport than those already well served by London Heathrow airport. It is the level of connectivity relative to the gross domestic product (GDP) of a country that will matter for productivity and economic growth.

**Table 1: A measure of connectivity to the global air transport network (2004)**

| Airport         | Number of destinations served | Number of available seats per week | Connectivity indicator |
|-----------------|-------------------------------|------------------------------------|------------------------|
| Chicago (ORD)   | 202                           | 1,056,286                          | 286.6                  |
| London Heathrow | 199                           | 944,024                            | 244.2                  |
| Beijing         | 122                           | 551,801                            | 92.5                   |
| Copenhagen      | 128                           | 284,479                            | 63.0                   |
| Johannesburg    | 85                            | 230,890                            | 34.7                   |
| Budapest        | 75                            | 101,546                            | 24.6                   |
| Nairobi         | 54                            | 78,850                             | 12.3                   |

Source: IATA; SRS Analyser.



## Measuring productivity

For economists, one of the key measures of economic performance is productivity. *Productivity* is a general term referring to the amount of economic output (that is, goods and services) generated by a given quantity of inputs. These inputs, or factors of production, can include labor, capital, energy, and materials. *Productivity growth* refers to the ability to produce the same amount of output using fewer inputs, or, equally, more output produced with the same amount of inputs.

It is productivity growth that sustains increasing standards of living. Paul Krugman writes:

Productivity isn't everything, but in the long run it is almost everything. A country's ability to improve its standard of living over time depends almost entirely on its ability to raise its output per worker. World War II veterans came home to an economy that doubled its productivity over the next 25 years; as a result, they found themselves achieving living standards their parents had never imagined. Vietnam veterans came home to an economy that raised its productivity less than 10 percent in 15 years; as a result, they found themselves living no better—and in many cases worse—than their parents.<sup>3</sup>

Productivity growth is key to economic growth. As Alan Blinder and William Baumol describe, it is the means by which countries can be lifted out of poverty and generate wealth and economic security:

Over long periods of time, small differences in rates of productivity growth compound, like interest in a bank account, and can make an enormous difference to a society's prosperity. Nothing contributes more to reduction of poverty, to increases in leisure, and to the country's ability to finance education, public health, environment and the arts.<sup>4</sup>

There are a number of different measures of productivity. Perhaps the most widely cited is labor productivity, which is the ratio of output produced to the amount of labor input used in producing the output:

$$\text{labor productivity} = \frac{\text{output}}{\text{labor hours}}$$

At the national level, output can be measured by the GDP of a country. The denominator is sometimes measured by the number of workers if labor hours data are not available. Labor productivity has its strengths and weaknesses as a performance measure. At the macroeconomic level, labor productivity is a key driver of growth in average income per head and is generally seen as the critical measure of economic performance.

At the level of decisions made by individual firms, maximizing labor productivity may not always be optimal. For example, by making enormous and expensive investments in automation, labor productivity can be

increased for the firm; but if the dollar savings in labor is more than offset by higher annual capital costs, then the firm may be worse off. Economists have developed an overall measure of productivity that considers not only the productivity of labor but also the use of capital, energy, and materials. This measure is referred to as total factor productivity (TFP) and is the ratio of output to a measure of the total inputs used in producing the output:

$$\text{TFP} = \frac{\text{output}}{\text{aggregate input quantity index}}$$

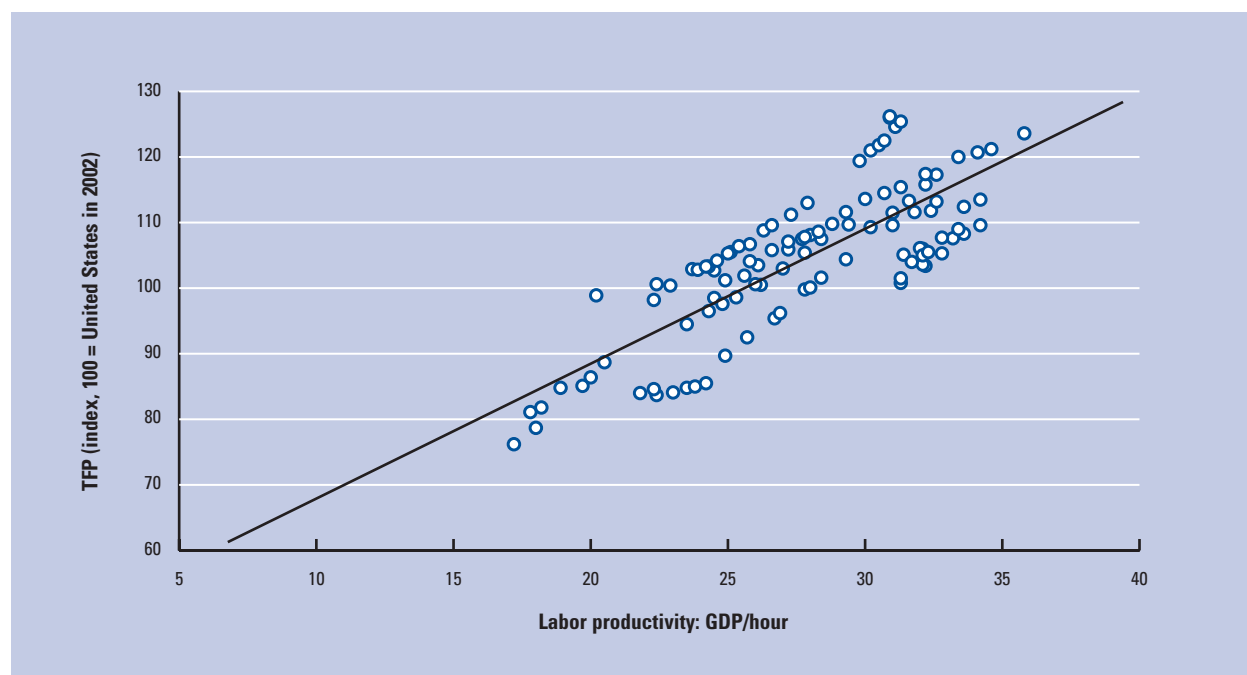
There is, however, a very real practical problem with TFP: it has much greater data requirements than measuring the productivity of a single factor of production such as labor—including the fact that it uses economic rather than accounting measures and that the measurement of capital services is not an easy task. The result has been that governments often compute labor and other single-factor productivity measures, but not measures for TFP. In practice this may not be too much of a problem for our analysis since, based on countries where both TFP and labor productivity were available, the two measures are highly correlated: the correlation coefficient is 0.80, as shown in Figure 1. This suggests that the difference in productivity over time and between countries, portrayed by the labor productivity measure, is very similar to that shown by TFP.

## Does connectivity drive labor productivity?

The contribution to a nation's economy of the air transport sector is sometimes measured by its direct contribution to GDP through its profits, its payments of wages, and its cost of using land and capital inputs. Sometimes the jobs and output that are supported along the industry's supply chain and that are supported indirectly from its spending (tourism for example) are also counted. However, in a developed economy with close to full employment, it could be argued that this indirect contribution does not represent added value to the economy since, in the absence of the air transport industry, another sector would employ its resources and consumers would buy other goods and services. This is not so relevant a criticism in developing economies. Moreover, what clearly cannot be replicated by other industries in the absence of air transport is the network of connections to global markets.

In particular, the air transport network:

- Facilitates world trade: Air transport connects businesses to a wide range of global markets, providing a significantly larger customer base for their products than would be accessible otherwise. This is particularly important for high-tech and knowledge-based sectors, and for suppliers of time-sensitive goods.

**Figure 1: Labor and total factor productivity measures are highly correlated**

Source: InterVISTAS.

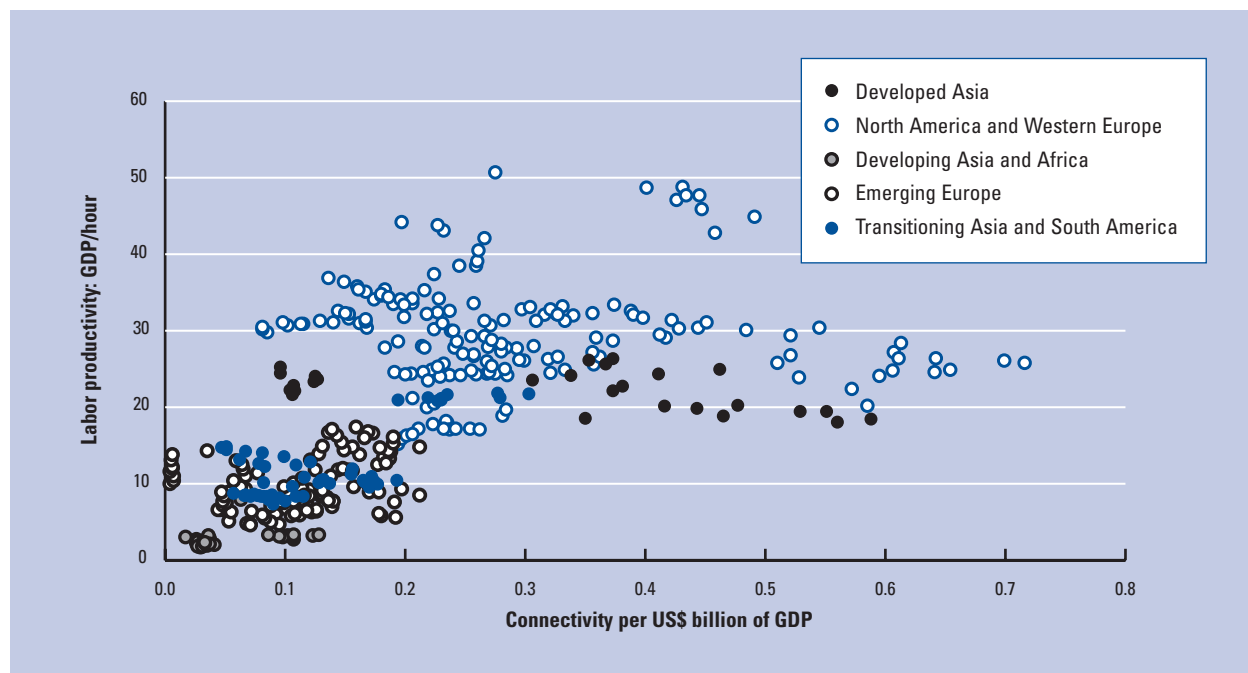
- Boosts productivity across the economy: By expanding the customer base, air transport allows companies to exploit economies of scale and reduce unit costs. By exposing domestic companies to increased foreign competition, it also helps to drive efficiency improvements among domestic firms in order to remain competitive.
- Improves the efficiency of the supply chain: Several industries rely on air transport to operate their “just-in-time” production operations, providing greater flexibility within the supply chain and reducing costs by minimizing the need to hold stocks of supplies.
- Enables inward and outward investment: Access to extensive air transport links allows domestic firms to identify and manage investments in foreign-based assets and encourages foreign firms to invest in the domestic country.
- Acts as a spur to innovation: Extensive air transport links facilitate effective networking and collaboration among companies located in different parts of the globe. Access to a greater number of markets also encourages greater spending on research and development by companies, given the increased size of the potential market for future sales.

These supply-side mechanisms will positively affect labor productivity. If they are sufficiently significant in size it should be possible to observe a positive relationship between rising economic connectivity and rising labor productivity.

Indeed, such a relationship can be seen in Figure 2. There are a number of important influences on productivity, such as varying levels of investment, education, and R&D, which are not controlled for in the figure. Nonetheless, even given these sources of variation there appears to be a clear pattern from just plotting connectivity against productivity. Developing Asia, Africa, and emerging or transition economies are at the bottom left of the figure. They have low connectivity relative to their GDP and also relatively low productivity. At the top right of the figure are the developed Asian, North American, and European economies with high levels of connectivity and labor productivity.

Above a certain level of productivity (US\$20 of GDP/hour) there is a wide spread of connectivity levels. This may well be due to a wider variation of other factors determining the level of labor productivity in these nations. It may also be that there is a threshold effect above which increasing the connectivity of already well connected developed economies does little to improve productivity.

However, up to that point there appears to be a clear positive relationship between higher levels of connectivity and higher levels of labor productivity, hence higher GDP and living standards.

**Figure 2: The link between connectivity and productivity**

Source: InterVISTAS; IATA.

Note: Cyprus, Hong Kong SAR, Malta, and Singapore have been excluded from the figure because their geographic circumstances have led to them having exceptional connectivity relative to the size of their populations.

### Surveying business opinions in five very different economies

The obvious way to understand better how the quality of a country's air transport network affects business productivity is to ask the businesses effected. We did this with the help of a survey of over 600 businesses in countries in different regions and at different stages of economic development (China, Chile, the Czech Republic, France, and the United States) by Oxford Economics.

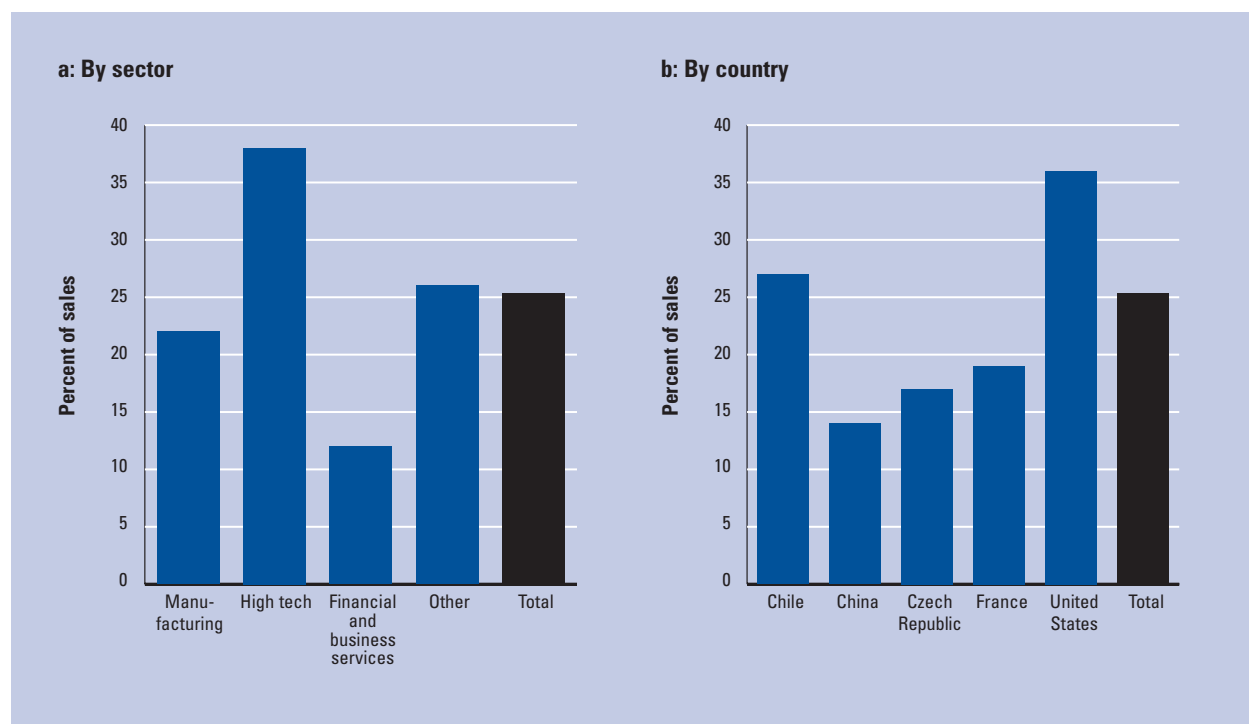
The companies surveyed report that, on average, 25 percent of sales depend on good air transport links. The importance of air transport for sales is especially high in the high-tech sector, where nearly 40 percent of sales depend on air services (see Figure 3a). This reflects the time-sensitive, high-value nature of products in this sector. Air transport is also more important for sales in the United States, where it supports 36 percent of sales (see Figure 3b). However, the proportion of sales dependent on air services is lowest in China and the Czech Republic, reflecting the developing nature of the air transport network in these countries. And less than 20 percent of sales depends on air transport in France, reflecting the strong competition from road and rail networks in Western Europe.

Over 80 percent of businesses report that air services are important for their sales, with nearly 60 percent describing it as vital or very important. The United States was once again the highest, with nearly 95 percent of firms saying that air transport is important for their sales. The importance of air transport is fairly consistent

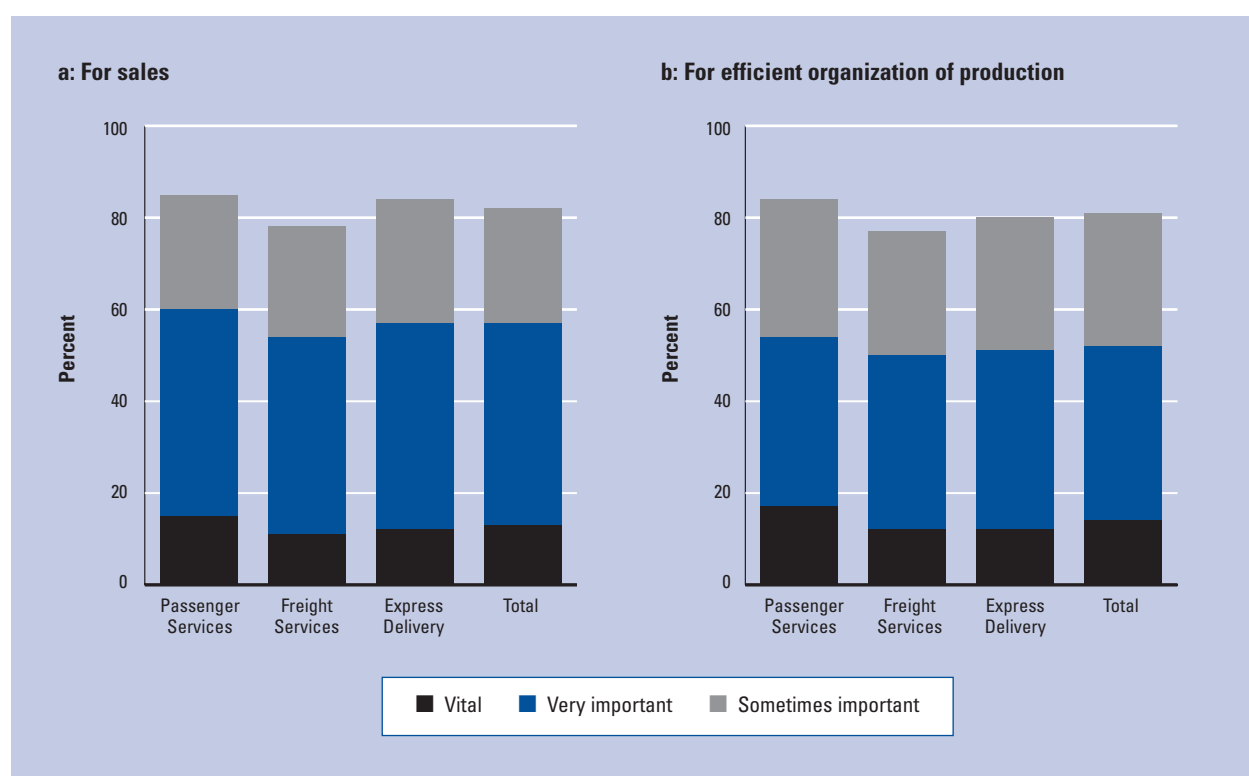
across the different types of air services, ranging from 78 percent of firms reporting that air freight services were important for sales to 85 percent who said that passenger services were important for sales (see Figure 4a). Freight services provide a direct link to sales by moving goods to new markets, but passenger services are even more important in terms of people-based services and because they allow management and sales to gain a greater understanding of the different market conditions across several countries. Indeed, over two-thirds of firms report that passenger services are vital or very important for establishing and maintaining customer relationships.

The air transport network allows firms to improve their efficiency of production and to reduce costs in four main ways:

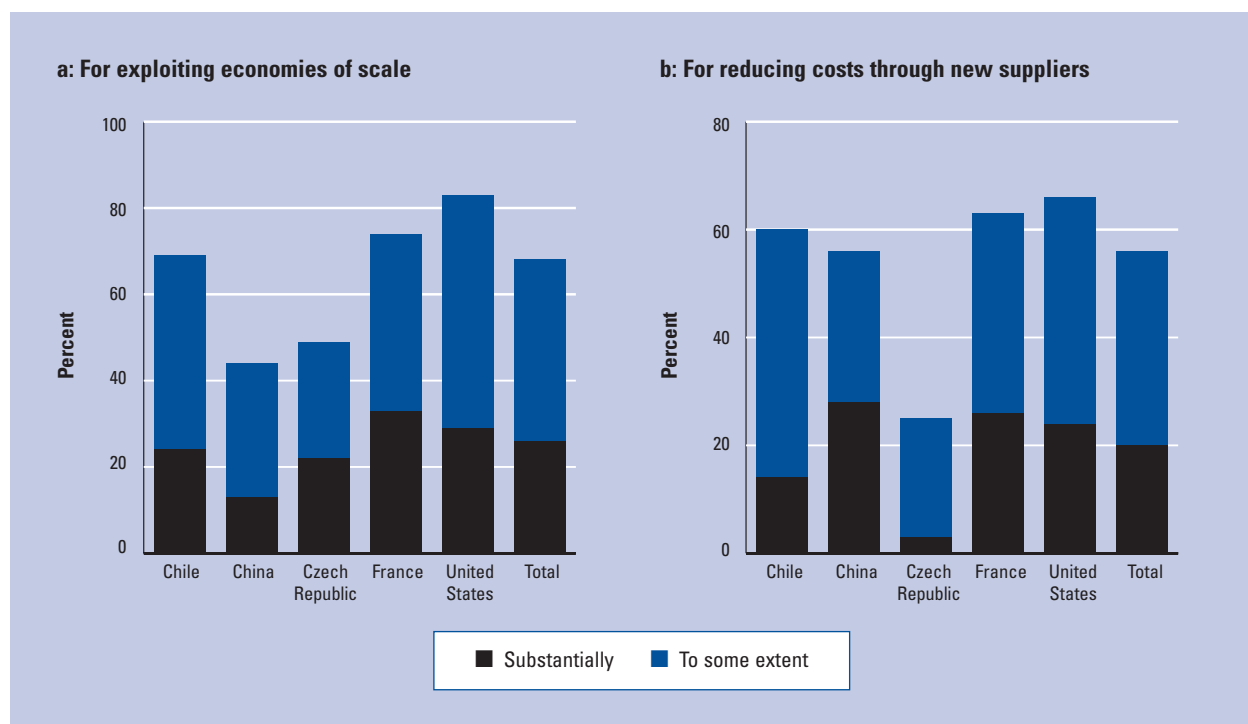
- It provides reliable and timely deliveries from suppliers, allowing firms to operate an efficient just-in-time production process and reducing the need to hold expensive inventories.
- It allows firms to exploit economies of scale by serving a bigger potential market.
- It allows companies to rationalize their own production among different sites and to source raw materials and other inputs from the most cost effective suppliers.
- It facilitates the spread of new production techniques, making it easier for firms to attract higher-quality employees from a broader pool of talent.

**Figure 3: Proportion of sales dependent on good-quality air transport links**

Source: IATA.

**Figure 4: Importance of good-quality air transport services**

Source: IATA.

**Figure 5: Implications of serving a bigger potential market**

Source: IATA.

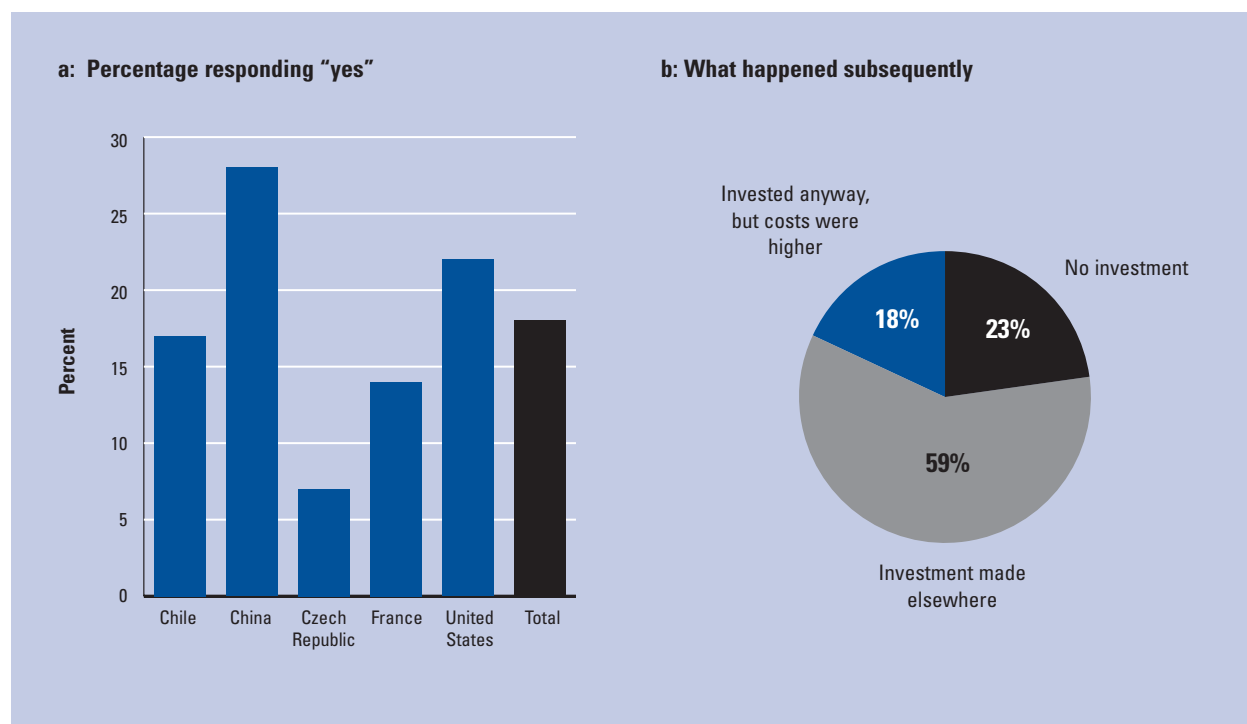
On average, 80 percent of firms report that air services are important for the efficiency of their production, with over 50 percent of firms saying it is vital or very important (see Figure 4b). The reported importance is also fairly consistent across the different types of air services, with passenger services considered to be the most important. Companies in China and the United States gain the most efficiency from air services, with two-thirds of companies in these countries stating that it is vital or very important for an efficient production process.

The impact of air services in exploiting economies of scale and sourcing more cost-effective suppliers is recognized by firms. Nearly 70 percent of firms report that, by allowing them to serve a bigger market, air services allow them to exploit economies of scale substantially or to some extent (see Figure 5a), while 56 percent state that these services also help to reduce costs from suppliers (see Figure 5b). The ability to exploit economies of scale is lowest in China and the Czech Republic, reflecting the focus of firms on the domestic market (in China's case) or exports to near neighbors (in the Czech Republic's case) at their current stage of economic development. The Czech Republic also had the lowest proportion of firms using air services to source cheaper supplies, reflecting perhaps a prevalence of nearby low-cost component producers. There are also significant differences between sectors in the ability to exploit economies of scale. Around three-quarters of

companies in the high-tech sector report an ability to exploit these advantages, compared with only a fifth in the financial and business services sector. This reflects the greater need for individual service tailored to the client in the financial and business services (FBS) sector, making the bigger economies of scale harder to achieve.

The trend toward globalization of production makes good air transport links essential for the management of subsidiaries. Over 80 percent of firms state that passenger air services are important for their ability to manage their organization and subsidiaries effectively. On average, nearly 30 percent of the employees of the companies surveyed travel for business purposes by air. Therefore the companies place a high value on air travel for the contact it facilitates with clients and with colleagues in overseas locations.

The accessibility to global markets provided by air transport provides a boost to investment decisions—both outward by domestic firms and inward by foreign firms. By allowing firms to serve a bigger market, air transport increases the number of potential customers for new product investment. By facilitating efficiency gains, air transport boosts the potential returns from investment in global production assets. The increased competition that arises from serving larger markets also benefits the wider economy through a more efficient allocation of resources. Competition encourages firms to specialize in the activities in which they are most

**Figure 6: Has the absence of good air transport links ever affected investment decisions?**

Source: IATA.

efficient, while allowing other products that may be produced more efficiently elsewhere to be bought in.

The air transport network is an important factor in determining where a company makes an investment, with 63 percent of firms stating it is vital or very important to their investment decision and a further 24 percent saying it is somewhat important. Even so, air transport is one of many factors in the investment decision and is slightly less important than the cost and availability of labor, taxes and regulations, and, perhaps, the local road network. However, the absence of good air transport links can be the major determining factor in not making an investment. On average, 18 percent of firms reported that the lack of good air transport links had affected their past investment decisions, with the less-developed nature of the Chinese air network accounting for the higher proportion of almost 30 percent who had altered past investment decisions (see Figure 6a). Of the investments that were affected, 59 percent were made in other locations with better air services, 18 percent went ahead anyway but with significantly higher costs, while in 23 percent of cases no investment was made (see Figure 6b).

Over half of the businesses surveyed believe that their ability to compete internationally would be very badly or moderately affected by any constraints on air

transport services, with a further 27 percent saying they would be slightly affected. Nearly three-quarters of firms in Chile believe their competitiveness would be very badly or moderately affected, a reflection of the large distances between the country and some of its major export markets.

Over 30 percent of companies state that they would be very badly or fairly badly affected by constraints on the availability of air transport services, while a further 40 percent would be inconvenienced. In particular, firms state they would be affected mostly through an increase in costs, a loss of customer contact, and a loss of orders. These are all factors that would restrict the productive potential of a country and its economic development. On average, 30 percent of firms report they would be highly likely to invest less in the region if air services were constrained, with 24 percent of firms highly likely to cut back on R&D investment in the region. The high-tech sector would be the most affected, reflecting the higher importance of air services to sales in the sector.

This survey evidence suggests strongly that connectivity with the global air transport network is an important potential source of business productivity gains, for both developing and developed nations.



## Quantifying the relationship between connectivity and productivity

To be more certain of this relationship, the economic consultants InterVISTAS undertook an econometric analysis of the data using the same type of model used by earlier studies investigating the impact of investments in the information and communication technology (ICT) industry on national productivity and economic growth (see Table 2).

**Table 2: Model coefficients**

| Term                       | Coefficient ( $a_i$ ) | Standard error | t-statistic |
|----------------------------|-----------------------|----------------|-------------|
| Constant                   | -0.37                 | 0.23           | -1.62       |
| Connectivity/GDP ( $a_1$ ) | 0.0068                | 0.0029         | 2.31        |
| % R&D ( $a_2$ )            | 0.0997                | 0.0192         | 5.19        |
| % education ( $a_3$ )      | 0.0191                | 0.0218         | 0.87        |
| GFCF/worker ( $a_4$ )      | 0.3733                | 0.0216         | 17.29       |
| Country dummies ( $a_5$ )  |                       |                |             |
| Argentina                  | -0.01                 | 0.06           | -0.09       |
| Australia                  | -0.17                 | 0.04           | -4.43       |
| Austria                    | 0.08                  | 0.03           | 2.45        |
| Belgium                    | 0.13                  | 0.03           | 4.04        |
| Brazil                     | -0.34                 | 0.06           | -5.57       |
| Bulgaria                   | -0.38                 | 0.07           | -5.61       |
| Canada                     | -0.03                 | 0.03           | -0.83       |
| Chile                      | -0.37                 | 0.06           | -6.61       |
| China                      | -1.08                 | 0.09           | -12.66      |
| Cyprus                     | -0.07                 | 0.06           | -1.05       |
| Czech Republic             | -0.12                 | 0.05           | -2.26       |
| Denmark                    | -0.07                 | 0.04           | -1.75       |
| Egypt                      | -0.92                 | 0.08           | -11.65      |
| Estonia                    | -0.43                 | 0.06           | -7.71       |
| Finland                    | -0.22                 | 0.03           | -6.71       |
| France                     | 0.13                  | 0.03           | 4.09        |
| Germany                    | 0.11                  | 0.03           | 3.57        |
| Greece                     | -0.03                 | 0.05           | -0.59       |
| Hong Kong SAR              | -0.24                 | 0.06           | -4.19       |
| Hungary                    | 0.02                  | 0.05           | 0.42        |
| India                      | -1.23                 | 0.09           | -13.33      |
| Ireland                    | 0.02                  | 0.04           | 0.35        |
| Israel                     | -0.42                 | 0.04           | -9.91       |
| Italy                      | 0.16                  | 0.04           | 3.67        |
| Japan                      | -0.40                 | 0.04           | -10.30      |
| Korea                      | -0.80                 | 0.03           | -23.10      |
| Latvia                     | -0.36                 | 0.07           | -5.09       |
| Lithuania                  | -0.23                 | 0.07           | -3.25       |
| Luxembourg                 | 0.26                  | 0.04           | 6.16        |
| Malta                      | -0.11                 | 0.06           | -1.67       |
| Mexico                     | -0.41                 | 0.06           | -6.48       |
| Netherlands                | 0.15                  | 0.03           | 4.36        |
| New Zealand                | -0.13                 | 0.05           | -2.78       |
| Norway                     | 0.25                  | 0.04           | 6.26        |
| Poland                     | -0.09                 | 0.07           | -1.38       |
| Portugal                   | -0.16                 | 0.05           | -3.25       |
| Romania                    | -0.59                 | 0.07           | -7.90       |
| Russian Federation         | -0.10                 | 0.08           | -1.16       |
| Singapore                  | -0.28                 | 0.05           | -5.75       |
| Slovakia                   | -0.05                 | 0.09           | -0.62       |
| Slovenia                   | -0.36                 | 0.04           | -8.94       |
| South Africa               | -0.39                 | 0.06           | -6.26       |
| Spain                      | 0.00                  | 0.04           | 0.00        |
| Sweden                     | -0.32                 | 0.04           | -8.05       |
| Switzerland                | -0.37                 | 0.04           | -9.85       |
| Turkey                     | -0.44                 | 0.06           | -7.38       |
| United Kingdom             | 0.01                  | 0.03           | 0.25        |

Source: IATA; InterVISTAS.

The model (Ln refers to a log<sub>e</sub> functional form in which parameters  $a_i$  can be read as elasticities) estimated from the data covering the period 1995–2005 was:

$$\begin{aligned} \text{Ln (GDP/labor hours)} = & \text{constant} \\ & + a_1 \times \text{Ln (connectivity/GDP)} \\ & + a_2 \times \% \text{ R\&D} \\ & + a_3 \times \% \text{ education} \\ & + a_4 \times \text{Ln (GFCF/worker)} \\ & + a_5 \text{ country dummy variables} \end{aligned}$$

## Impact of factors other than connectivity on productivity

The estimates shown in Table 2 of the impact on productivity of factors other than connectivity are consistent with the findings of other research studies on productivity.

The largest impact on productivity comes from capital spending per worker (“GFCF/worker” is gross fixed capital formation per worker), or what is known as *capital deepening*. A 1 percent rise in capital spending per worker will increase labor productivity by 0.37 percent.

If an additional 1 percent of GDP was spent on R&D, productivity would rise by 0.1 percent. An equivalent amount spent on education would raise productivity by 0.02 percent.

The constant term and the country dummy variables capture any remaining reasons for productivity differences between countries. The dummy variables are relative to the United States so, for example, the insignificant coefficient on the United Kingdom dummy variable suggests that all differences in productivity between the two countries are captured by differences in capital spending, education, R&D, and connectivity. The highly significant coefficient of -1.23 on India’s dummy variable suggests there are some other factors (perhaps institutional or social) that keep productivity lower than can be explained by differences in capital spending, education, R&D, and connectivity.

## Impact of connectivity on productivity

The estimated impact of connectivity on productivity is statistically significant and shows that a 10 percent rise in connectivity, relative to a country’s GDP, will boost productivity by 0.07 percent.

This implies that investing in air transport capacity in developing or transition countries, where connectivity is currently relatively low, will have a much larger impact on their productivity and economic success than that same scale of investment in a relatively developed country.

For example, the recent accession of Poland to the European Union resulted in a rise in the number of flights between Poland and the United Kingdom in both directions during the period June 2003 to June 2006, from 58 a week to 250, raising the number of seats available each week from 7,000 to 40,000. For Poland that meant a rise in connectivity of 27 percent; the increase in the already well served United

Kingdom's connectivity was a much smaller 0.5 percent. The estimated long-term boost to Poland's productivity and GDP was 0.19 percent or US\$634 million, compared with 0.004 percent or US\$45 million for the United Kingdom.

These estimates are consistent with what might be expected *a priori* from similar research on the productivity impact of the ICT sector. For example, a study by Statistics Canada suggests that between 1981 and 2000 each 10 percent increase in ICT investment led to a 0.5–1.2 percent increase in productivity.<sup>5</sup>

### An example from Canada's Vancouver International Airport

To give a practical example, and to estimate the economic rate of return from investing in air transport infrastructure, InterVISTAS looked at the recent expansion of Vancouver International Airport (YVR) in Canada. Between 1995 and 2000 the airport authority at YVR made substantial investments in terminals, runways, and other infrastructure in order to increase the capacity of the airport. Over this time period the airport experienced a substantial increase in traffic. For example, air passenger volumes increased by 34 percent. This is not to say that the investment in airport capacity was the only reason, or even the main reason, for this increase of traffic at Vancouver. One major factor was the liberalization of air services between Canada and the United States in 1995. However, the investment in capacity was necessary to facilitate and support the growth in traffic to and from Vancouver.

Allowing for a certain amount of replacement spending, the investment in YVR's airport infrastructure during 1995–2000 totaled C\$506 million (in 2005 prices). To handle the additional 4 million passengers there was also investment in additional aircraft. It is difficult to disentangle investment for other markets from airline capital spending programs. However, assuming a 5 percent rise in aircraft load factors, the rise in passengers would have required an extra 8 aircraft with 200 seats flying an average of 4 flights a day. The estimated cost of this is C\$1,280 million in 2005 dollars. In addition, the Canadian federal government spent C\$19 million on a new air traffic control tower in 1996.

In total there was an investment of C\$1,805 million associated with a 25 percent rise in the connectivity of YVR (this was less than the 34 percent rise in passengers because destinations are weighted according to their economic importance).

The impact on Canada's connectivity was to increase it by 5.4 percent over the period 1995–2000. On the basis of the model set out above this would have raised Canada's productivity by 0.04 percent. Since Canada's GDP in 1995 (in 2005 dollars) was C\$969 billion, this implies an additional C\$348 million in national output.

For an investment of C\$1,805 million to produce an annual increase to GDP of C\$348 million implies an annual rate of return of 19.3 percent. This rate of return does not include the direct benefits to passengers of the added services or any increase in profits for the airport or airlines. The total economic rate of return would be considerably higher. Even so, 19.3 percent is a very good rate of return.

### Some examples from less well developed nations

Using a methodology similar to the one used in the Vancouver example, the rate of return on capital investment in air transport was estimated for Kenya, Cambodia, El Salvador, and Jamaica, all countries at much earlier stages of economic development than Canada (see Table 3).

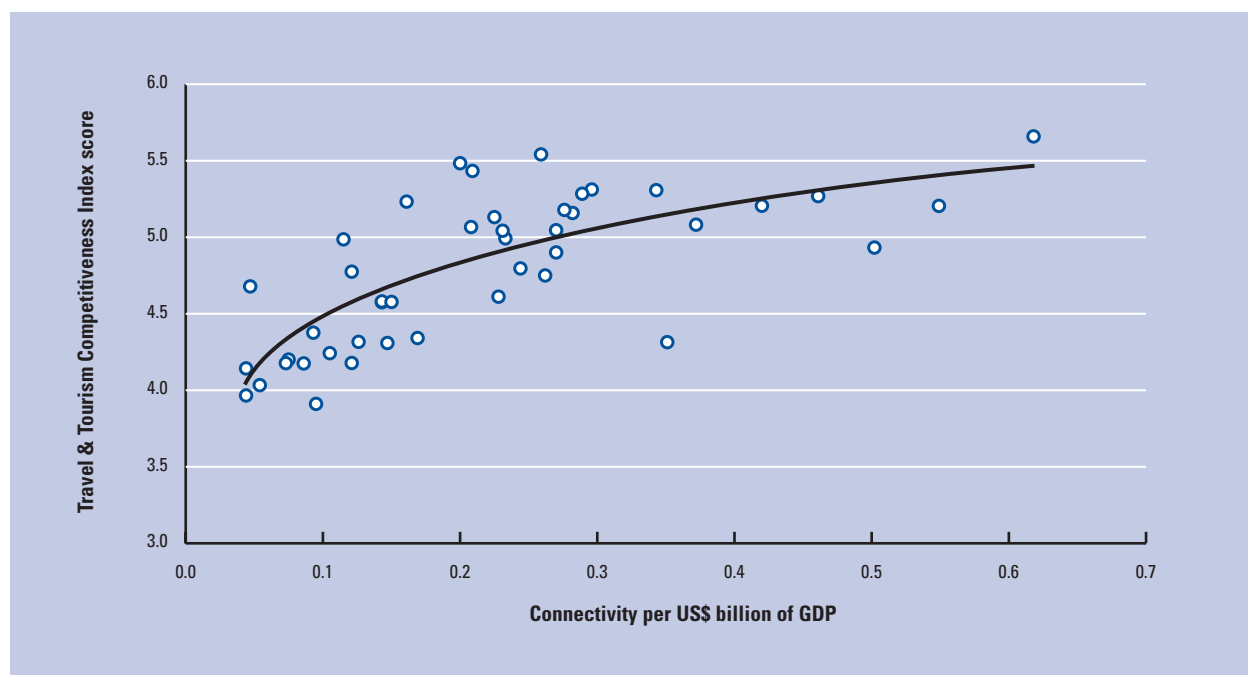
As with the Vancouver example, these estimates are based on capital investment programs at the major international airport (sourced from the Airports Council International) of each country between 2000 and 2005. Estimates have been made of the new aircraft required, based on the increase in seat capacity at the airport between 2000 and 2005, using 200-seat aircraft with a list price of US\$150 million.

Between 2000 and 2005, connectivity increased by between 34 percent and 85 percent in these four countries. The percentage impact on national GDP ranged from 0.2 percent to 0.4 percent. On a percentage basis, the impact in these countries is substantially larger than that of Vancouver's (0.04 percent), as expected. In the case of Kenya, with its relatively large economy,

**Table 3: Developing-country rates of return from investment in air transport**

| Country     | Airport investment (US\$ million) | Aircraft investment (US\$ million) | Increase in connectivity 2000–05 (%) | Increase in GDP (%) | GDP in 2000 (US\$ million) | GDP increase (US\$ million) | Annual rate of return (%) |
|-------------|-----------------------------------|------------------------------------|--------------------------------------|---------------------|----------------------------|-----------------------------|---------------------------|
| Kenya       | 61                                | 348                                | 85                                   | 0.417               | 50,007                     | 209                         | 59                        |
| Cambodia    | 248                               | 538                                | 61                                   | 0.323               | 31,085                     | 100                         | 19                        |
| El Salvador | 256                               | 546                                | 43                                   | 0.245               | 34,592                     | 85                          | 16                        |
| Jamaica     | 23                                | 168                                | 34                                   | 0.199               | 13,123                     | 26                          | 16                        |

Source: InterVISTAS; ACI; IATA.

**Figure 7: The relationship of the overall Travel & Tourism Competitiveness Index to a nation's connectivity**

Source: World Economic Forum; IATA.

the rate of return on investment—59 percent—is also considerably higher than it is for Canada.

For the other three much smaller developing economies the rates of return, at 16–19 percent, are comparable with the rate for Canada. These are still high rates of return for investment projects. Remember also that these returns do not include the direct benefits to passengers or any improvement in the profits of the airport and airlines. The reason why these rates of return are not higher than Canada's is that many capital costs, particularly for new aircraft, are as high for developing as for developed nations, yet the developing countries' level of GDP is lower. Above a certain size of economy the larger boost to productivity will more than offset high capital costs and generate very substantial rates of returns. However, for small economies, high capital costs may restrict rates of return to developed-country levels.

## Conclusions

Bringing about an increase in connectivity is shown to bring substantial long-term economic benefits, even for a highly developed economy such as Canada. The benefits are even larger for developing countries, such as those in Africa. Realizing these benefits will require investment in infrastructure but may also require the liberalization of markets and other institutional changes to bring about the rise in connectivity.

Many of the factors necessary to develop connectivity and gain the benefits to productivity and economic growth are set out within the Travel & Tourism

Competitiveness Index (TTCI) presented in this *Report*. The index provides nations with a measure of how they rank on each factor and how far away they are from the nations they may seek to benchmark themselves against.

The TTCI and connectivity relative to GDP are not perfectly correlated because they are not designed to measure exactly the same thing, but there is a clear relationship between the two measures, as Figure 7 shows. The TTCI emphasizes those factors that will help to develop the tourism industry rather than the connectivity that boosts the productivity of an economy's business sector and its long-term economic growth.

Clearly, investment in any nation's air transport sector is important for its economic development to the extent that connectivity is improved to better serve the nation's business sector. That in turn may require institutional changes such as market liberalization. The TTCI should be instrumental in helping governments to identify where such change is necessary. As ever, indexes need to be used with care to obtain the lessons sought; nonetheless, this is an important addition to the toolkit of policymakers seeking to improve the economic contribution of the T&T sector worldwide.

## Notes

- 1 See Conference Board of Canada (1997).
- 2 For more information on the Global Competitiveness Index, see Chapter 1.1. in *The Global Competitiveness Report 2006–2007* (World Economic Forum 2006).
- 3 See Krugman (1992, p. 9).

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4 See Blinder and Baumol (1993, p. 778).

5 See Harchaoui and Tarkhani (2004).

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## Long-Haul Hubs and the Future of Air Transport

**MAURICE FLANAGAN**, Executive Vice Chairman, Emirates Group

There has been a steady shift in global air traffic flows over the past two decades, coupled with an expanding and strong appetite for air travel worldwide. This paper discusses the shifts in global air traffic flows from the dawn of modern commercial aviation to the present day, and considers how the future of air transport might take shape. It looks at the development of Dubai in the United Arab Emirates as an example of how new long-haul hubs will enact their role in that future.

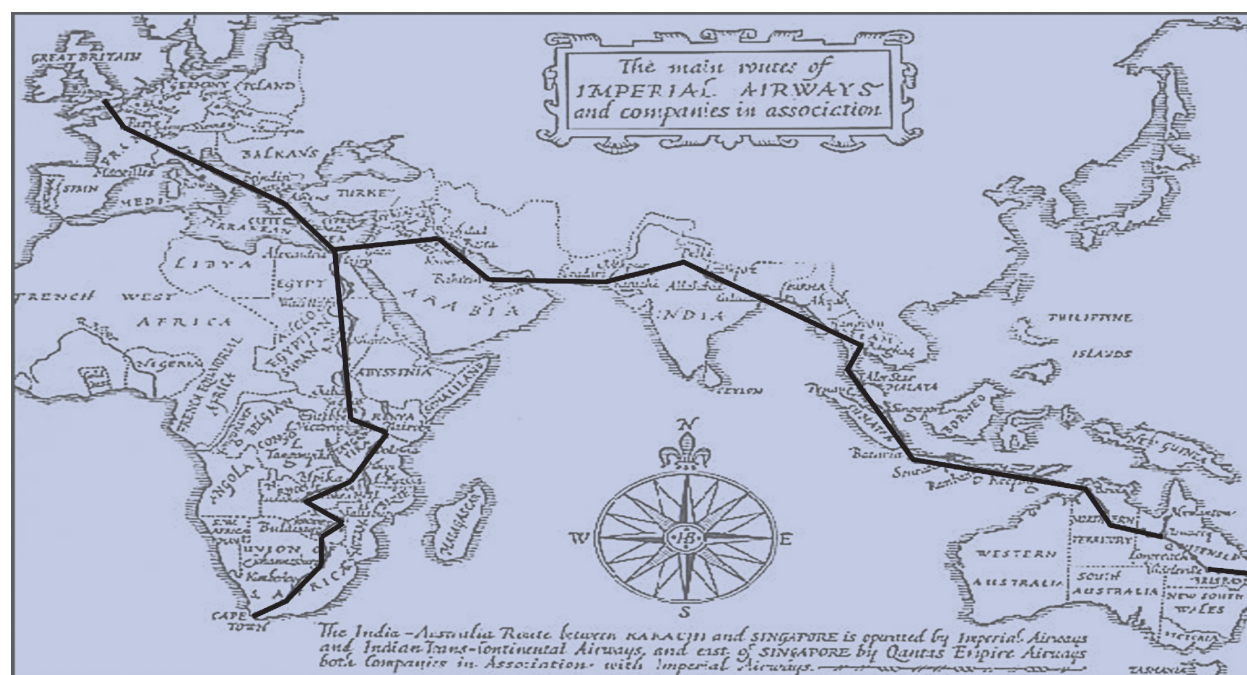
### Changing patterns in air travel

In the early days of civil aviation, most international air routes evolved from the old colonial empires originally served by flying boats (see Figure 1). This originated from traditional European centers such as London and to some extent Amsterdam and Paris—establishing east–west routes to colonies in India, the Far East, and Australia, and north–south routes through the African continent with multiple refueling stops in between. In the early 1930s, Pan Am’s “clippers” also paved the way for international flights initially with air mail contracts to South America and later across the Pacific to Hawaii, the Philippines, and Hong Kong. However, Europe still dominated the bulk of international air traffic with east–west routes.

Trans-Atlantic commercial air travel began in the late 1930s, but it started to take off only after World War II when US and European carriers such as Pan Am, TWA, Trans Canada Airlines, BOAC, and Air France used larger piston aircraft, which allowed services over the North Atlantic with intermediate stops. Jet service began in the late 1950s, and European airports developed into pivotal hubs for global air transport, consolidating and facilitating the bulk of east–west and north–south traffic flows.

The 1970s and 1980s saw the rise of Asian carriers, led by Singapore Airlines. The gradual loosening of air industry regulations had made it possible for multiple airlines to compete in the same markets and on more routes, fueling the development of the global air travel market. During this time, traditional east–west global traffic flows remained relatively unchanged, but new air transport hubs in Asia such as Singapore, Hong Kong, and Tokyo began to grow in prominence as booming Asian economies spurred global traffic growth and the development of intra-region traffic within Asia, as well as trans-Pacific routes. African routes remained relatively underserved, while the Arabian Gulf countries such as Bahrain and the United Arab Emirates found a role as refueling stops for intercontinental jets on east–west routes between Europe and the Asia Pacific region.

World travel patterns are now undergoing another major change, driven by the increasing globalization of business and communities, growing populations, and rising incomes. Air travel is today more accessible to more people than ever before, as technology and efficient

**Figure 1: Colonial air traffic flows**

Source: [www.imperial-airways.com](http://www.imperial-airways.com).

aircraft lower the real cost of airfares and bring air travel within the reach of mass populations—airfares have never been cheaper in real terms (see Figure 2). Air travel, once the domain of the wealthy and privileged, is today a form of mass transport, with over 4 billion passengers flying annually.

### Surging demand for travel

The instant global sharing of information via the Internet and satellite broadcasts, coupled with the liberalization of world economies, has stimulated travel demand by opening new possibilities for a mobile workforce, international trade, and the leisure traveler.

Global demand for air transport services has been growing steadily. This demand has proved resilient despite several shocks in the past five years to the air travel industry from terrorism, health scares, and high fuel prices. The International Air Transport Association (IATA) forecasts that international air travel will continue to expand at an average annual rate of 4.8 percent between 2006 and 2010, while air freight traffic is expected to continue growing at 5.3 percent annually on average.<sup>1</sup> Demand for air transport will be driven by global economic growth, as more people share the need to meet each other, or to buy and sell goods made elsewhere—and rising incomes means they can now better afford to travel. For business or for pleasure, people today want to travel more often and further, in greater comfort and a shorter time.

Over the next 20 years, demand for air travel is likely to see a new surge brought about by the rise of

China and other emerging economies such as Brazil, India, and Russia. Historical growth rates for the airline industry indicates that demand for air travel grows at a multiple of GDP growth and disposable income.<sup>2</sup> Many fast-developing markets such as those of Brazil, China, India, and Russia are generating some of the highest GDP per capita growth rates in the world, far outstripping the average global GDP per capita growth of 2.9 percent in 2004.<sup>3</sup>

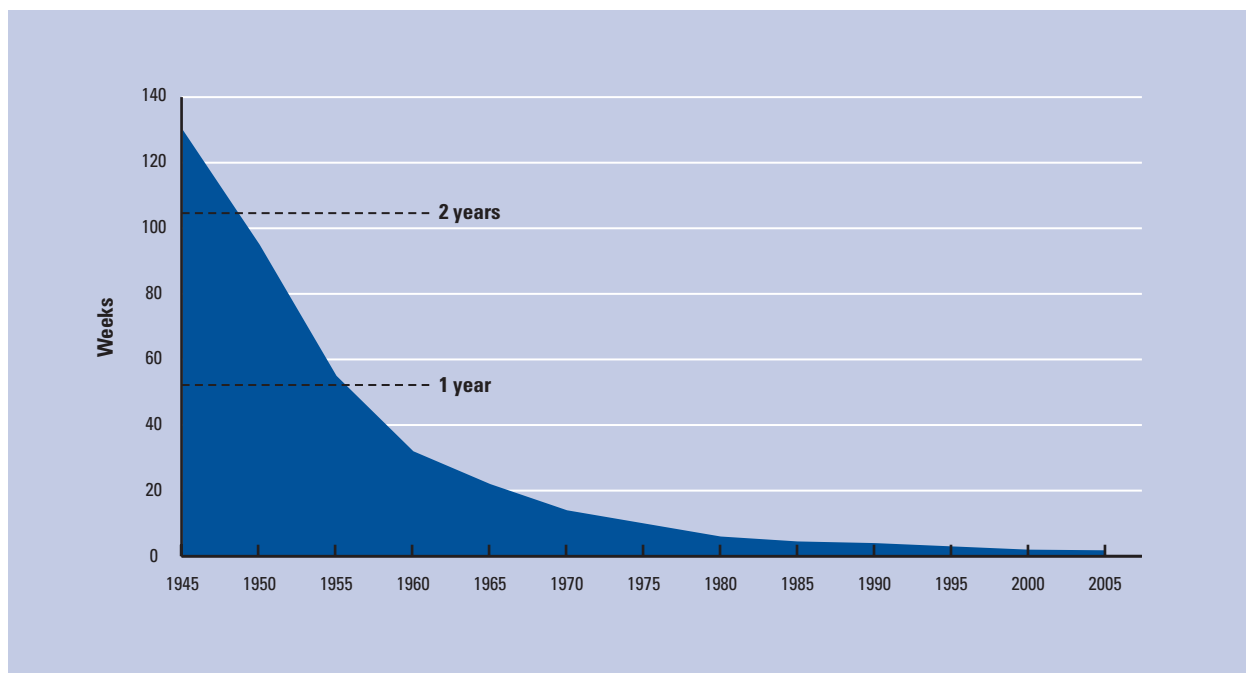
### Effect of high demand on air transport hubs

For air carriers, these emerging markets could open new and massive catchment areas for passenger traffic, not to mention new markets for air freight transport to move consumer goods and raw material for industries. This paper posits that air transport hubs in Asia and the Middle East, in particular, will be well placed to take advantage of the changing world travel patterns. While US and European hubs will remain important, the relative influence of traditional European hubs for international air transport will diminish (Figure 3).

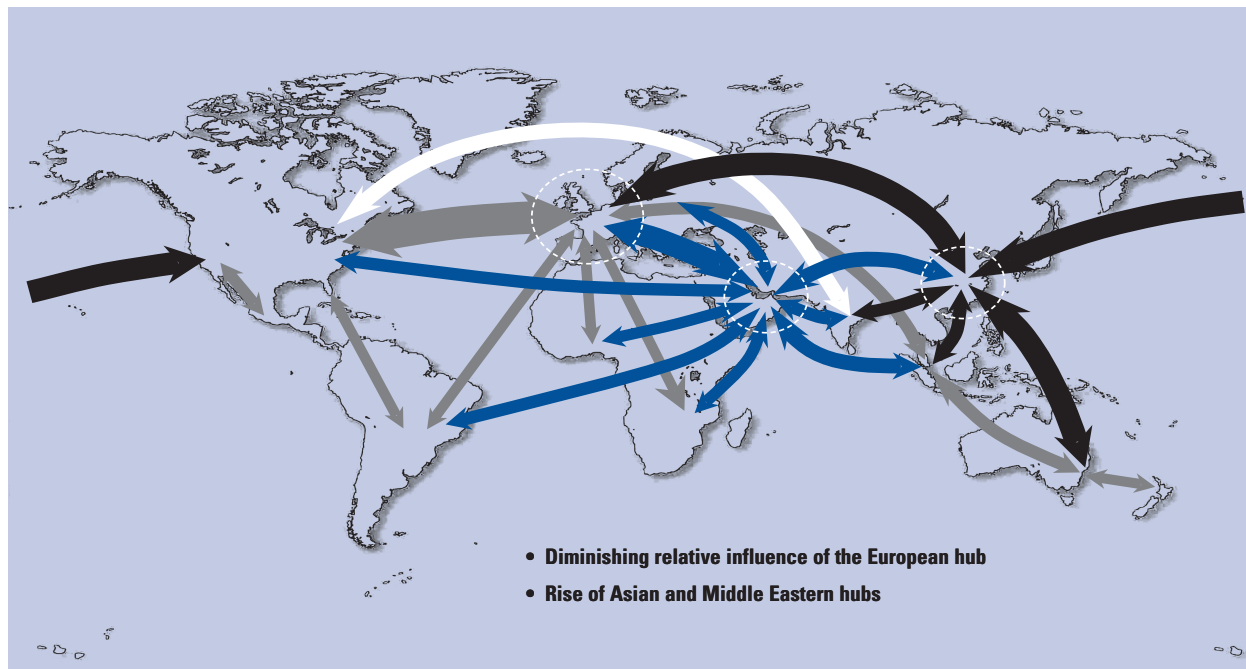
### Long-haul hubs in the Middle East

As a region, the Middle East enjoys a geocentric location that is a key advantage in facilitating and optimizing global air traffic flows east–west or north–south. Operating from a relatively lower cost base than airports and airlines in other parts of the world, traffic at airports in this region is surging.



**Figure 2: The number of average weeks' earnings required to fly from London to Sydney**

Source: Data from Thomas and Forbes Smith 2003, p. 181.

**Figure 3: Major international travel patterns today**

Source: Author.

According to Airports Council International (ACI), traffic growth at airports worldwide increased by 6.5 percent in 2005 over 2004, with airports handling some 4.4 billion passengers and 82 million metric tons of cargo. The organization estimates that passenger traffic at airports in the Middle East have increased 10.9 percent, outstripping all other regions, and cargo traffic growth stands at 5.4 percent, second only to growth in the Asia Pacific region.<sup>4</sup>

A tourism boom in the Middle East is also contributing to the region's air traffic growth, powering the rapid expansion of airports and airlines. Figures from the World Tourism Organization (UNWTO) indicate that the Middle East region's share of the world's tourism market has increased from 2.5 percent to 4.8 percent within the past decade, with international tourism arrivals reaching 38.4 million in 2005.<sup>5</sup> For 2006, the UNWTO predicts that the region will notch up over 8 percent growth, attributing the strong performance to a growing interregional middle-class market and continuing investment in infrastructure development and marketing, along with improved tourism development.

IATA forecasts that international passenger air traffic in the Middle East will expand by 7 percent in 2006, with an average annual growth of 6.9 percent until 2010—ahead of all other geographic regions including the economically robust Asia Pacific, where it is predicted that passenger air traffic will grow 5.7 percent annually from 2006 until 2010.

The Middle East region is actively tapping into this potential, and Arabian Gulf countries in particular are investing heavily to develop their tourism infrastructure. This in turn is driving investment in airports and the air transport industry.

#### Infrastructure investment in the Middle East

Middle Eastern markets are undergoing a phase of strong economic growth and massive infrastructural development. In the six-nation Gulf Cooperation Council (GCC) region alone, it is estimated that there are some 1,400 planned infrastructure projects worth US\$1 trillion in April 2006,<sup>6</sup> of which airport development and expansions worth over US\$40 billion are currently taking place.

It is an interdependent relationship. Economic growth drives demand for air transport, and air transport can in turn contribute to that growth by generating jobs and secondary industries, as well as facilitate tourism and trade through the movement of cargo and people across global markets. However, to take advantage of the expanding demand for Travel & Tourism, airlines and airports must have the infrastructure and facilities. The Gulf region in particular has been a hot-spot of rapid development in air transport.

Middle Eastern carriers currently account for just 9 percent of long-haul capacity worldwide, but they are responsible for nearly a quarter of all global long-haul

aircraft deliveries over the next decade.<sup>7</sup> Dubai-based Emirates Airline, for instance, is the largest buyer, with approximately 70 percent of all new long-haul aircraft orders in the Middle East, and it is planning to more than double its all-wide-body fleet capacity by 2012. Its current order book of over 100 wide-bodied aircraft is estimated to be worth some US\$30 billion. Other airline players in the region with sizable wide-bodied aircraft orders include Qatar Airways with an estimated order book of some 40 aircraft and Etihad Airways with over 20 aircraft pending delivery.

#### Challenges to growth

Despite bullish projections for global air travel demand, it is not an entirely a blue skies outlook for commercial aviation. In the short to medium term, the key challenges that the industry faces are high fuel prices, infrastructural and aero-political constraints, the stability of the global economy, and environmental issues.

Airports and airlines, including those of the Middle East, will need to tackle the huge supply-side industry pressures wrought by the combination of increased traffic, high demand, and high oil prices. Efficiencies and innovative ways to reduce costs have never been more vital.

Industry-wide initiatives to increase efficiency and lower costs include the introduction of e-ticketing, the establishment of more efficient flight paths, radio frequency identification (RFID) tagging, the use of the Internet for flight bookings and air cargo tracking, and self-service check-in kiosks among many new technologies. Aircraft manufacturers are also developing jets that are more cost efficient to fly and maintain, but still afford greater onboard comforts while flying longer distances in less time.

All throughout the value chain—from airlines, airports, and aircraft manufacturers to reservations systems providers and IT service developers—the industry has to continue finding dramatic and creative ways to cut costs and respond to new customer demand.

#### The A380 and other new long-haul aircraft

Against the backdrop of growing demand and supply-side pressures, new-generation aircraft that offer expanded range, enhanced passenger comforts, and vastly improved operating economics will play an integral role. The massive Airbus A380 double decker, expected to enter commercial service for the first time in 2007, will provide long-haul hub carriers such as Emirates and Singapore Airlines with much-needed capacity to tap the booming global demand for air travel, while at the same time seeking to mitigate the likely ongoing slot shortages and congestion problems experienced at some airports.

Wide-bodied aircraft capable of efficient and economical ultra long-range flights, such as Boeing's 777 long-range aircraft and Airbus' A340-500, also open

new routing possibilities for connecting high-demand city pairs nonstop, or any two points on the globe with a single stop in a centrally located long-haul hub such as Dubai. Possible routes, for instance, could link San Francisco and Dubai nonstop; Buenos Aires to Moscow via one stop in Dubai; or Sydney to Houston via Dubai.

Combine this long-range capability with that of the A380, the world's biggest passenger aircraft, and long-haul carriers such as Dubai-based Emirates will be able to target any type of market it chooses. The airline will also have ultra long-range Boeing 777-200LRs in its fleet, which would provide further flexibility to put exactly the right aircraft on a specific route.

Long-haul hub carriers such as Emirates differ from the legacy carriers operating a traditional hub-and-spoke model. In the latter case, the airline's network consolidates short-haul traffic into long-haul operations, but a carrier such as Emirates mainly has long-haul traffic flows.

New-generation aircraft such as the A380 and Boeing 777-300ERs and 777-200LRs are fundamental to the development of long-haul hubs in the Middle East. They are also vital to the future of airlines such as Emirates, allowing the carrier to remain competitive while keeping unit costs low in a scenario where it is forecast that fuel could hit sustained levels of over US\$60 per barrel.

At present, Middle Eastern carriers generally enjoy a favorable operating environment where their home cities are investing heavily in infrastructure to develop the air transport industry as a means to economic growth. Access to a non-unionized and relatively cheap labor force at their home bases and the pro-business tax regimes within which they are working are also factors that provide Middle Eastern carriers with a relatively low unit cost base compared with their European and US counterparts, and with some Asian airlines.

In addition, many of the region's long-haul carriers—such as Emirates, Qatar, and Etihad—are operating young and efficient aircraft fleets that are more cost effective to fly and maintain than older fleets, again contributing to these airlines' unit cost advantage as well as to their ability to win and retain customers by providing a better flight experience. For example, Emirates' all wide-bodied fleet of over 90 aircraft average only 61 months in age compared with the industry average of 187 months.

A Boston Consulting Group report estimates that, on a like-for-like basis on long-haul routes, Middle Eastern carriers have a long-term total unit cost advantage over US and European carriers of between 18 and 32 percent.<sup>8</sup>

However, rapid economic growth in the Middle East—in particular the Gulf nations—may erode this unit cost advantage as inflationary pressures build up. In addition, the strong growth in air transport worldwide means skilled labor such as pilots, aviation engineers, and flight controllers are in high demand. Airline and

airports in fast-developing markets such as China, India, and the Middle East are finding it increasingly difficult and costly to attract such talent from the international market.

Keeping a watch on costs while developing operations and managing rapid growth will be high on the agenda for Middle Eastern airlines and airports as they strive to expand and create new markets. They must also maintain a competitive edge over other well-established international airports in Europe and Asia, which are already enjoying hub efficiencies and economies of scale.

### Dubai: The ideal long-haul hub

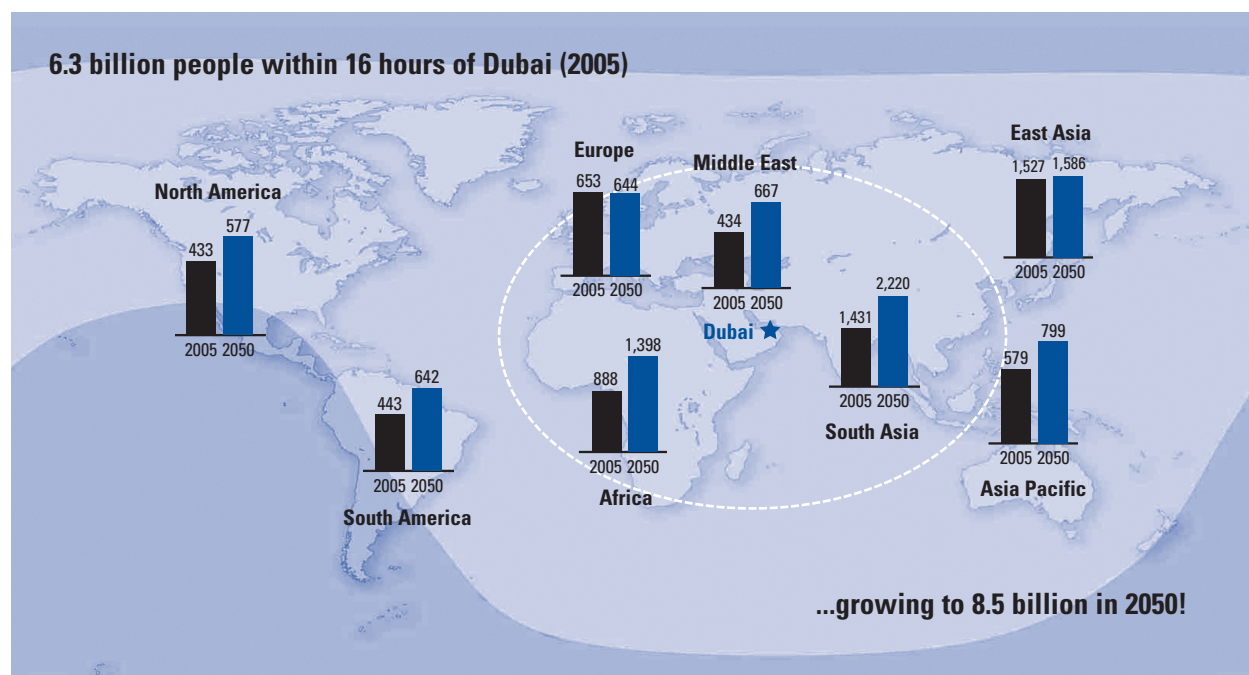
The air transport industry in the Gulf has attracted increasing international interest in recent years, ignited by a series of multibillion dollar aircraft orders from Gulf-based carriers such as Emirates Airline, Qatar Airways, and Etihad, and stoked by accompanying massive airport expansion and development projects. There is also excitement in the aviation industry about the potential of India, which possesses some growth pillars in common with the Middle East. These include a geographically central location, a strong economic climate, and air traffic expansion.

However, unlike the Arabian Gulf nations, India has a huge domestic source market that has yet to develop to its full potential, and the country has neither the same level of political commitment nor the capital investments to drive the development of air transport infrastructure. Thus this paper suggests that, in the near to medium term, it is unlikely that Indian airports will develop into long-haul hubs of the same caliber as is already being seen in such cities as Singapore and Dubai.

Dubai, one of the seven emirates that make up the United Arab Emirates (UAE) in the Arabian Gulf, is developing into a long-haul air transport hub unlike anything seen before. Its success and rapid growth is exerting an increasing influence on global air traffic flows and shaping the way the industry views long-haul hubs and long-haul carriers.

In the three decades since the UAE was formed in 1971, the rulers of Dubai have deliberately and aggressively pursued a master plan to develop the city into a global center—for commerce, tourism, and global air transport—to wean its economy away from dependency on the emirate's small and declining oil reserves. It would be difficult to find a better location for a global air transport hub than Dubai, which is perfectly situated between the major population centers of east and west and north and south.

Africa, China, Europe, and India are all within easy reach of nonstop flights from Dubai using current commercial aircraft. Dubai is also perfectly positioned to carry the east-west, ultra long-haul traffic from the Americas, the Far East, and Australasia with future new-generation aircraft. Within 8 hours' flying time of Dubai,

**Figure 4: Dubai: The ideal long-haul hub**

Source: Based on data from UN 2004.

the city's catchment area encompasses approximately 5.5 billion people—a figure projected to grow to 7.8 billion by 2050.<sup>9</sup> If that area were expanded to a 16-hour radius, within reach of new ultra long-range aircraft, Dubai's air hub could potentially serve a population of 6.3 billion—or a projected 8.5 billion people by 2050 (see Figure 4).

#### Dubai International Airport: Potential for growth

The potential is enormous. If only 10 percent of the population in the expanded catchment area traveled by air, and only 20 percent of those chose to travel via Gulf hubs, there will be a potential customer base of some 170 million people in 2050 for Gulf operators.

As a long-haul hub, Dubai also has an added bonus: it is a destination and attraction in its own right. Driven by a sustainable long-term vision to transform the emirate into a global powerhouse for commerce and tourism, the Dubai government has successfully attracted multibillion dollar investments and scores of foreign companies to set up operations in the city. Dubai is arguably the fastest growing city in the world, with an annual average GDP growth rate of 10 percent over the past decade. Planned developments announced in Dubai are estimated to be worth some US \$200 billion.<sup>10</sup> Investments in the real estate sector alone are estimated to come to US\$50 billion by 2010; these include infrastructure projects in the free-zones and mega projects such as the Palm Islands and The World (land reclamation projects visible from space), Burj Dubai (the world's

tallest tower), Dubailand (the world's largest tourism attraction, planned to be 100 times the size of Monaco when complete), and the new Dubai Waterfront (the world's largest waterfront development, to be larger than Manhattan)—just to name a few.

Without a doubt, Dubai's "Open Skies" policy has played a major role in the city's success as a commercial center and air transport hub. As a result of this open skies model, any airline has the ability to fly to the emirate and compete without restriction. This is the reason that Dubai International Airport today is served by over 110 scheduled airlines that link the city to some 190 destinations. It allows the emirate to offer the extensive air services critical to attracting conventions and trade shows, and critical also to influencing the location of corporate and regional headquarters, service companies, research and development facilities, and manufacturing sites.

Consumers, business travelers in particular, also benefit when they choose to travel through Dubai hub airport, because they have a greater choice of flights and destinations, greater frequency of service, flexibility in rescheduling, and a general efficiency in their travel, such as avoiding the time and cost of an overnight stay because of good flight connections.

As a global destination, Dubai currently attracts over 6.5 million visitors annually, and it is putting in place the infrastructure to attract 15 million visitors by 2010. Its flagship carrier Emirates, with its more than 100 new aircraft on order and its ambitions to connect



Dubai directly to more than 100 cities around the world by 2012, is well positioned to support and build on this growth. In fact, the success of Dubai and its home carrier Emirates Airline has been such that neighboring countries and airlines—notably Qatar—have begun to emulate this model of symbiotic growth.

As a center for air transport, Dubai is already the region's busiest airport and transshipment hub. The city whose aviation industry started off in 1937 as a stop-over point for Imperial Airways' flying boats enroute to Karachi is today the world's 12th busiest airport for international passenger traffic and 11th ranked for cargo traffic.<sup>11</sup> More than 20 million travelers and some 1.2 million tonnes of cargo passed through Dubai's airport in 2005, and both passenger and cargo traffic are on track for 15 percent growth in 2006.

The city's confidence in its ability to play an even bigger role in the future of air transport is reflected in its massive plans to put in place new infrastructure, and in the inauguration of Dubai Aerospace Enterprises in early 2006. This joint-venture consortium is intent on becoming a world player in aircraft leasing, airport design and management, aviation training, maintenance repair and overhaul, manufacturing, and consultancy—with particular focus on emerging markets in the Middle East, Asia, India and China.

#### Dubai airport infrastructure investments 2005–10

Dubai International Airport, which only recently completed its first major expansion with the opening of its second terminal (the Sheikh Rashid Terminal) in 1999, is now investing in further expansion to tap into the growth in air travel demand globally and in the region. A new airport terminal, tailor-made to accommodate the Airbus A380 aircraft, will be ready by the end of 2007, as will a new Cargo Mega Terminal. The airport is also building two additional concourses and upgrading its airfield facilities with new aprons, taxiways, tunnels, and runway extensions. When fully completed, this US\$4.1 billion expansion phase will boost the airport's capacity to 70 million passengers and 3.6 million tonnes of cargo annually.

But passenger traffic at Dubai airport is projected to hit 60 million in 2010, so these new facilities would reach full operational capacity within just two years of completion. That is why construction has already commenced at the new Dubai World Central in Jebel Ali, some 60 kilometers from the current airport. Dubai World Central is a brand new, integrated airport city in a free-zone environment. It comprises a multitransport mode logistics hub, an international airport with six runways and the capacity for 120 million passengers annually, a residential development for 750,000 people, a golf resort, and commercial centers. The first phase of Dubai World Central is due for completion in 2009.

#### Gazing into the crystal ball

It is still too early to tell if a dual-airport system in Dubai will take off, or even be necessary. It is clear, however, that the city is intent on establishing a strong position to tap into the future growth of global air transport demand.

Bolstered by strong GDP growth, expanding populations, and rising affluence, other cities in the Gulf are also experiencing an increasing demand for air travel. Having observed Dubai's model for success, these cities too are keen to tap on the region's aviation and tourism boom to diversify their traditionally oil- and gas-dependent economies.

Planned projects in the Gulf region will see more than US\$40 billion invested in new airport infrastructure over the next five years. Announced projects include:

- a US\$6.8 billion Abu Dhabi airport expansion,
- a US\$5.5 billion new airport in Qatar,
- US\$2.1 billion for airport expansion in Kuwait,
- a US\$1.5 billion airport expansion plan in the Kingdom of Saudi Arabia, and
- over US\$33 billion for the new Dubai World Central airport and integrated logistics city in Dubai's Jebel Ali.

Some industry watchers have expressed skepticism about the viability of multiple airports competing for long-haul traffic in the Gulf region, predicting a potential fall-out or rationalization. This need not be the case. Southeast Asia can be viewed as an example. This is a region with a head start of about a decade on the Middle East in terms of experiencing strong and steady economic and air transport growth.

Singapore, Thailand, and to a lesser extent Malaysia, today operate successful long-haul hubs in a region that is highly competitive but buoyed by a strong economic environment and expanding travel demand. All three countries have invested heavily in air transport infrastructure, and have flagship carriers that focus on international long-haul traffic. Thailand has just inaugurated its new Suvarnabhumi Airport in Bangkok with a capacity for 45 million passengers annually; Singapore's Changi Airport, having just completed a US\$153 million upgrade of its second terminal, is currently building a third terminal to boost its annual capacity to 64 million.

Being situated close to competitive long-haul hubs does not appear to have had a negative impact on these Southeast Asian airlines or airports, nor has the recent mushrooming of low-cost point-to-point carriers operating in that region. In fact, according to analysts in Asia, the concern is the need to expand existing infrastructure to cope with air transport demand rather than competition between hubs.

According to Peter Harbison, executive chairman of the Sydney-based independent aviation consultancy CAPA, “Asia’s major hubs will continue to have to invest in new airport capacity, to meet expected trade and tourism growth. The capacity shortages run the risk of undermining hub competitiveness, not to mention inconvenience to passengers, while airport congestion can also lead to financial loss for airlines.”<sup>12</sup>

Having the necessary infrastructure to support air transport growth appears to be a theme not only in Asia and in the Gulf, but also worldwide. At the Global Air Transport Outlook Conference in Montreal in July 2006, Airports Council International Director Robert Aaronson said, “Time is running out on the building of airport capacity to meet anticipated demand. The strain on many airports is already apparent. And the growth continues unabated this year according to our monthly data.”

He added that global airport capacity is not matching projected global passenger growth, and the implications of capacity shortfall and its resulting congestion are bleak in terms of the quality of the travel experience.

## Conclusion

The global market for air transport is getting bigger. There will always be room for a carrier such as Emirates, served by a hub such as Dubai. In the future of air transport, geo-centrally located long-haul hubs, particularly in the Middle East, are set to play an increasingly important role if the resources are invested to tap into the potential for growth the way that Dubai and other Gulf nations have done.

European hubs will continue to play an important role in global air traffic flows, but the rise of new long-haul hubs in the Middle East, combined with the advent of new ultra long-haul aircraft, will influence these flows and affect the way travelers experience long-haul travel. For global businesses and international travelers, the development and strengthening of long-haul hubs in the Middle East ultimately delivers more air transport options and potentially more efficient ways to travel or to ship products to international markets.

## Notes

- 1 See IATA (2006).
- 2 See Budde et al. (2006b).
- 3 See World Bank (2006). In 2004, GDP per capita growth for China was 9.4 percent, India 5.4 percent, Brazil 3.5 percent, and Russia 7.7 percent.
- 4 See ACI (2006).
- 5 See UNWTO (2006).
- 6 See Sutherland and Wuebbeler (2006).
- 7 See BCG (2006a).
- 8 See BCG (2006a).
- 9 See UN (2004).

- 10 See the Middle East Economic Digest (MEED) Projects Database, April 2006.
- 11 See ACI (2005, p. 14).
- 12 See Han (2006).

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## The Challenge of Open Skies in the Middle East: How to Manage Competition in the High-Growth Air Transport Sector

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The Middle Eastern air transport sector is maturing rapidly. Recent significant capacity increases from relatively new carriers are equalled in ambition by internal change within incumbent airlines. A formerly sleepy backwater in the aviation landscape is generating increasing interest. From 1999 to 2005, international flying within the Middle East increased from 3 million to 12 million passengers: a fourfold increase compared with an international average rise over the six-year period of 30 percent.<sup>1</sup> Some of the most substantial aircraft orders in the world are taking place in the Middle East. Adoption of cutting-edge reservation and commercial technologies is commonplace, and a few airlines are joining the global airline alliances. Investment in both primary and secondary airports is booming, and the auxiliary industries (such as maintenance, catering, flight training, and airport handling) are rapidly undergoing consolidation and privatization.

The diversity of business models is also maturing as airlines evolve from the traditional flag carrier model to a more sophisticated set of strategies. These differences are driven by diverging wealth levels and national economic policies, and are reflected in different fleet strategies. A few new airlines are single-type carriers, mimicking the classic low-cost model. Other airlines focus on wide-body fleets, leveraging the lower seat mile costs and substantial airfreight capacity as part of a hub strategy. The wide-body airlines based in relatively small home markets will necessarily rely substantially on transit traffic. Recent orders for regional jets by other carriers reflect a growing interest in developing thinner routes and matching capacity to demand.

### The drivers of change

Seven forces are both driving these changes and feeding upon each other. It is more useful to consider them separately rather than group them as a generic result of “globalization.” Indeed, these forces are in some cases very particular to the Middle East.

The first is the increased demand for air travel stimulated by the rapid growth in Middle Eastern economies. Two principal causes of this increased demand stand out: a steep rise in population and rising fossil fuel prices. These factors have led not only to an increase in disposable income but also to a substantial increase in capital available for businesses, which in turn leads to more employment and increased demand for travel. These results have shifted the demand curve to the right, creating opportunity for the supply of air transport to expand profitably in its wake. Furthermore, recent geopolitical events have made it more difficult for Middle Eastern capital to be invested abroad. These restrictions on flows of capital from the Middle East lead to even more local investment than would otherwise be the case.

The second force is an increasing relaxation of bilateral agreements between Middle Eastern states, which opens up international traffic. This is especially true for secondary destinations. Civil aviation authorities are implementing the increased political willingness of their governments to push for more capacity in the skies. In some cases, this is a positive by-product of increased cross-border investments. These investments create an environment in which economic ties are often reinforced with other examples of openness, such as air transport liberalization.

Third, several Middle Eastern governments are granting new operating licenses that directly increase the number of carriers, thus stimulating competition and expanding capacity. Even the most economically and politically conservative governments are doing this. Other states are setting firm timetables for the end of the incumbent carrier's monopoly, or are using the designation of secondary points as "Open Skies" to attract new carriers. Furthermore, other airlines operating as charter or airfreight carriers are increasingly encouraged to base themselves in secondary airports.

The fourth force is the increasing reluctance of some states to subsidize the incumbent airline directly. There is increasing pressure on many airlines, well before their privatizations are timetabled, to create economic value. Sometimes this leads to the spin-off of profitable auxiliary services.

Fifth, and as a result of the above forces, there has developed a brisk increase in the flows of labor (both white and blue collar) from other regions to the Middle East. The biggest flow is from the Indian subcontinent. As the growth of the demand for human resources outstrips local talent and capacity, a new market has been created as millions of foreign workers relocate to the Middle East.

Sixth, several states in the Middle East are pursuing an economic policy that requires a strong airline at its core. This strategy of creating economic hubs combines industrial and touristic objectives. This is often a combination of a sea/air intermodal freight strategy and a tourism strategy. These policies require the rapid establishment of economic entities that will support a vertiginous increase in the flow of goods and people through the hub. A strong, multideestination and high-capacity airline sits at the heart of this strategy. It is imperative to ensure both that the deep seaport has a reliable "air" outlet for the mostly East-West flows, and that the hub has passenger air traffic links with a wide spectrum of tourist source markets.

It could also be argued that this sixth force is sometimes combined with the intent to use air travel as an instrument of foreign policy. A fast-growing and aggressively marketed airline is a relatively cheap way of gaining visibility abroad. In many ways, this policy is an updated version of the traditional flag carrier model—however, it is a policy with considerably more funding

than the traditional one, with higher service levels, and with substantial corollary infrastructure.

The seventh and final driving force, strongly linked to the sixth, is the infrastructure developments that accompany the strategic use of airlines as a wider economic policy. These investments are most visible at seaports and airports. Investment in airports will be distributed not only in physical buildings but also in handling services. There is, it should be noted, a risk of market distortion here if as a result the home carrier has access to handling charges and services that are not in line with the costs. Leaving these issues to one side, it is clear that substantial investments in this infrastructure support the development of airlines as they remove a series of obstacles to growth.

### The good news

The developments described above are generally welcome. The virtuous circle of increased capacity, falling fares and stimulated demand for air transport supports regional markets and strengthens their relevance to the wider global economy. Middle Eastern airlines are stimulating investment in aircraft technology, creating employment, and supporting closer economic integration in a region previously characterized by isolationist tendencies. Their growth sends a clear message from many Middle Eastern states that they are keen to play their part in the world community and to strengthen trade and transport links with the rest of the world.

The impressive increase in tourism flows to the Middle East creates positive political fallout. Stopover programs are creating the opportunity for business travelers to take a break in a country that they would not otherwise visit. The acceleration of non-oil-related foreign investment is a testament to the diversification of many Middle Eastern economies. It is cheaper and easier than ever to do business in the Middle East. Furthermore, as airlines grow and become more professional, they increasingly focus on both modernizing their fleets and increasing adherence to international standards such as the International Air Transport Association (IATA) Operational Safety Audit.

### Problems ahead

It is not clear, however, that these expansionary and generally positive trends are leading to a genuinely fair competitive environment that would result in sustainable growth of the regional air transport sector. Indeed, in many ways these very high levels of growth in the Middle Eastern air transport sector mask the absence of a regional agreement on the boundaries of fair competition. The director general of IATA, Giovanni Bisignani, recently asked a gathering of Middle Eastern airline CEOs "how do we make sure your emerging success

story has a happy ending?” He called for the “implementation of real policy measures to support growth.”<sup>2</sup>

As the skies open, it is increasingly important that a basic set of competitive criteria be established. Strengthening intraregional competition regulations will allow economically viable airlines to flourish in an environment that rewards genuine commercial success. Further down the line, a correctly regulated Middle Eastern aviation sector will allow a structured rationalization of capacity to take place, with productive mergers and acquisitions creating a number of strong regional airlines. Scale is important in a consolidating market, and solid regulation will support this. The current risk is the inefficient allocation of resources, leading to a very high increase in capacity that is not able to channel itself in an economically viable manner through market forces.

Unfortunately, some of the faster-growing Middle Eastern carriers are currently pushing for a superficial version of Open Skies that limits itself to expanding Air Service Agreements (ASAs). These carriers call for unlimited frequency/capacity between states. This unfortunate state of events is a by-product of certain states putting their national short-term interests ahead of the development of a mature regional air transport industry.

The sixth and seventh forces outlined above are usually present in the home markets of the airlines that are less willing to sign up for fair competition regulation. The losers in unregulated Open Skies would be the airlines that are genuinely free-market, with neither state support (direct or indirect through infrastructure) nor access to cheap capital. These airlines, ironically, have to restrain the political pressures to liberalize ASAs.

It took decades for the European Union to develop and implement a framework for regulating air transport. The Treaty of Rome in the late 1950s put the structure in place, but it was not until the 1980s and 1990s that European countries started to address the direct economic support of airlines by their governments. There are many pressures, both from within the Middle East and from without, for a shallow liberalization of the skies that is far from the necessary comprehensive approach. Such an approach would consider, among other elements, key issues such as taxation, security, access, infrastructure, and competition law. These issues have been left to one side in the Middle East because air transport has traditionally been considered a luxury and policies have not yet adapted to the enormous growth of the last decade.

Currently some airlines in this region are “stuck” between two conflicting realities. On the one hand they are pressured to be economically viable and financially independent from their parent governments. At the same time they are pushed toward a competitive environment that allows less financially independent airlines unlimited access to their home market. This is a result of a one-dimensional approach to liberalization that fails to

consider the full context of the air transport sector’s requirements.

### Issues with the European Union

It is in the interests of the European Union to engage constructively with the Middle East on the issue of air transport. In fact, the European Union is well positioned to do this and is already targeting increased cooperation between the two regions with initiatives such as Euromed. Furthermore, the painful journey of European airline privatization is almost over (with only one major airline still not significantly restructured); thus Europe’s competitive relationship with the airlines of neighboring regions will soon become a key issue.

Indeed, the major European carriers are some of the most vocal critics of the fast-growing airlines based in the Middle East. The complaints primarily concern issues of competitiveness. However, Middle Eastern airlines also have reasons to be unhappy with certain anticompetitive traits of the EU skies. An excellent example of this is access to major airports. This access is restricted by an archaic grandfather rights slots system, which prevents Middle Eastern carriers from expanding capacity to major European hubs; there are no similar impediments for EU carriers in the Middle East. Instead of an efficient market in airport slots—which would mirror increasingly mature markets in handling, catering, and other auxiliary services—Middle Eastern airlines are excluded from competing with incumbents.

Moreover, the EU Horizontal Agreement initiative vis-à-vis ASAs is counterproductive. It makes the renegotiation of any ASA with a member state difficult by forcing the other state to accept a clause that allows any EU-based carrier to use these rights. For example, if a Middle Eastern state wishes to increase the flight frequency in its ASA with France, it would have to accept that, from that time forward, any EU member state carrier could use the “French” flight frequency from France to that Middle Eastern state. Although this might address internal EU legal issues, it severely cramps the possibility of liberalizing ASAs between Middle Eastern countries and any EU member state. The desired path would be a gradual relaxation based on mutual convenience—the current situation is imbalanced. The EU should consider providing more leeway when negotiating with Middle Eastern states that manage their home carrier with economic policies similar to those of EU member states.

### Two areas of necessary progress

The first step forward needs to be taken within the Middle East. The evolution of a group of states that is committed internally to fair competition is crucial. Competitive fairness is a necessary step for genuinely unsubsidized airlines in the region to feel comfortable

with the opening of skies. Therefore the countries that are willing to agree to a fair competition environment should come together and campaign for comprehensive liberalization in the region. These airlines should push both the International Civil Aviation Organization (ICAO) and regional bodies such as the Arab Air Carriers Organization (AACO) and the Arab Civil Aviation Commission (ACAC). Within their states these airlines should lobby their respective ministries of transport to insist on a stronger emphasis on establishing competition law that would protect the unsupported airlines.

In parallel to this, the European Union needs to reconsider its current negotiating stance with regard to the further liberalization of ASAs. It should depart from its current policy and deal differently with those states willing to engage in truly comprehensive negotiations within a framework of fair competition. A phased approach to the designation issue would allow Middle Eastern countries to renegotiate and open their skies with the European Union at a measured pace. Immediate acceptance of this designation clause could be replaced with a commitment to accept in three or four years. Furthermore, the European Union should strive to create incentives for countries that are clearly showing an intention to move toward EU-style air transport policies: no subsidies, privatizations, encouragement of startups, and privately financed infrastructure. These policies are creating partners that the European Union should be keener to integrate into their skies and with whom the all-important issue of slots should be addressed.

Creating a fair and sustainable air transport sector in the region is something that all Middle Eastern airlines should aspire to in the medium to long term. Every airline has a stake in a balanced and correctly structured market. It is also in the interests of nearby countries and regional blocs, such as the European Union, to support initiatives that lead to economically rational and stable outcomes. With such impressive growth and evolving maturity in the industry, ensuring sustainability and developing deeper integration into the international air transport market is highly desirable.

## Notes

- 1 See IATA (2000, 2006).
- 2 Remarks by Giovanni Bisignani at the AACO Annual General Meeting, Kuwait City, November 22, 2006.

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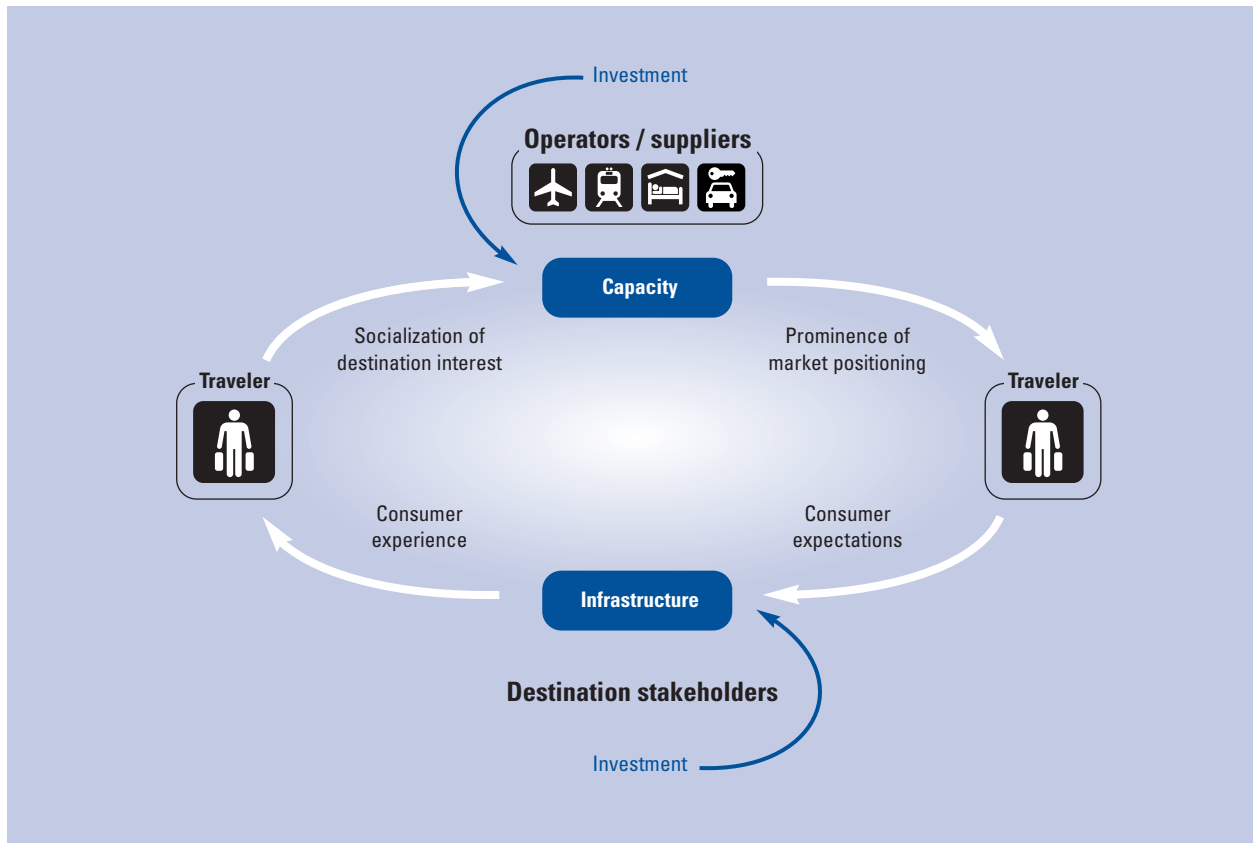
## Driving Tourism Growth through Consumer-Centric Marketing

**BRAD CORRODI**, Managing Partner, Rosetta Marketing Group

Numerous studies have established the powerful economic and social benefits of a strong Travel & Tourism (T&T) sector, for developing economies as well as maturing ones. Realizing the significant potential from sustained growth has often proven more challenging. There have been relatively few analyses performed on how T&T sectors develop or what specific actions can be taken by governments and industry to accelerate the pace of development while achieving the desired sector composition. Further, there are both structural and practical barriers that must be addressed in order to build and sustain momentum for growth. Recently, however, the massive changes that have occurred in the structure of travel distribution have opened up new opportunities for collaboration between the public and private sectors to achieve tourism development objectives. By taking a rigorous, market-based consumer-centric approach to collaborative marketing, travel suppliers, tourist boards, and commercial intermediaries can radically improve the productivity of their marketing spending while accelerating sustainable, profitable growth.

The core of the tourism growth challenge lies in the circular interdependence of supply and demand (see Figure 1). Governments and travel suppliers must invest in a broad range of infrastructure and capacity in order to create a credible proposition for business investors and leisure travelers (as highlighted in the Travel & Tourism Competitiveness Index, or TTCI). The proposition must be communicated to these constituents and delivered as expected in order for the flow of visitors to continue. Similarly, governments and suppliers need to see growth in demand in order to see returns on their initial investments (in the form of tax receipts, GDP growth, and capacity utilization) before committing to additional infrastructure and capacity. The result is a “chicken-and-egg” feedback loop, which can lead to either an upward or a downward spiral.

In the case of the positive, upward spiral, demand markets gain momentum from early visitors and investors who have had positive experiences and talk about the merits of a destination to others—effectively multiplying the impact of ongoing destination marketing and development spending. The strong growth in demand encourages other suppliers to invest in the destination, and reinforces the credibility and funding for continuing tourism development initiatives—including deregulation and structural reforms as well as continued infrastructure and marketing funding. Singapore (ranked 8th in the TTCI) and Dubai (in aggregate, the UAE ranked 18th) are perhaps the best-known cases of such positive feedback. Both governments made a clear, substantial, and public commitment to the development of the tourism sector, directed according to a clear tourism strategy developed collaboratively among public and private stakeholders. As a result, these destinations succeeded in gaining broad public awareness in key source markets, with consistent messaging and brand positioning.

**Figure 1: The interdependence of supply and demand**

Source: Rosetta, 2006.

Most importantly, visitors to these destinations found the experience consistent with the brand promise, and private sector suppliers were relatively free to increase their services to and within these markets.

Unfortunately, there are many more cases where investments in tourism development have not ignited a positive feedback growth engine. Each case is unique, and there are often many factors that contribute to the failure. Five of the most common are highlighted below:

1. **Insufficient “critical mass.”** Building consumer awareness of a brand or product requires multiple impressions over time, and it is increasingly difficult and costly to attract consumers’ attention amongst a flood of advertising messages. Most destinations and suppliers simply are not large enough to justify the cost of campaigns that are big enough to “cut through the clutter.”
2. **Lack of “resonance.”** Campaigns that succeed in generating impressions may not generate consumer response. Too often marketers try to maximize response by designing campaigns that will appeal to as broad an audience as possible—and end up with

a message that is far too generic to motivate any particular consumer type. Effective campaigns generate response with a product promise, messaging, and a call to action that is relevant to the specific attributes that a target consumer group feels are important.

3. **Inability to convert.** Even campaigns that succeed in generating response are unsuccessful from a financial perspective when inquiries are not cultivated effectively. Tourist board promotions that direct consumers to a telephone service bureau that is equipped only to take brochure requests will dissipate the consumer’s initial enthusiasm and fail to convert interest into sales.
4. **Misalignment with the “promise.”** Campaigns that promise a destination experience that is at odds with reality quickly find the results to be counter-productive. Numerous studies have shown that negative travel experiences are shared many times more often than positive ones, and have a far greater impact on others’ travel-decision process.



5. **Choking the golden goose.** Some of the most successful destination campaigns have failed to deliver sustained growth when government stakeholders have failed to understand that a transparent, open market for tourism investment is a critical precondition for positive-feedback multiplier effects to take hold. Early success can be stifled if well-connected players are allowed to unduly influence subsequent market access, or if the tourism industry becomes unduly burdened with tax or cross-subsidy obligations.

All of these sources of failure tend to have a common root cause—a failure to establish the basis and structure for collaboration among the diverse private and public stakeholders that constitute the T&T ecosystem. Although the broad objectives of generating growth are clear and agreed, in very few cases have the various stakeholders established specifically where their interests are aligned and where they diverge, nor have they defined the specific rules of engagement that are required to make ongoing “co-opetition” work in practice. Initial agreement on a television campaign to promote a destination often breaks down when the discussion turns to the size and relative contributions to the media buy. Even simple collaboration on the conversion of interest to sales such as destination-based hotel booking service centers—face difficulties in maintaining participation from tourist board members when they become concerned about which properties are actually being recommended to callers and why.

In the cases of both Dubai and Singapore, strong top-down leadership ensured that all participants understood and accepted the rules of engagement: who would establish the overall marketing and communications strategy; how marketing and infrastructure development would be funded; the standards that each supplier would be expected to meet; and, specifically, how each participant could expect to benefit from the successful growth of the destination as a whole. However, asserting such top-down leadership and control of a destination proposition is simply not feasible in many other situations, particularly in economies with established tourism sectors where existing players are unlikely to delegate their interests to a central authority. Further, centralized plans may not respond effectively to market demand signals, just as planned economies have generally underperformed market economies.

Faced with these challenges, governments of some smaller economies have essentially outsourced responsibility for their positioning as a destination to foreign tour operators. In these arrangements, the government and local suppliers effectively subsidize the source-market activities of the operator through deeply discounted “net” rates and direct payments for presence in their brochures. Such arrangements can be mutually

beneficial, as they address the first three hurdles in destination marketing:

- By combining products from several suppliers and destinations into a single brochure (and other marketing media), the communications can achieve a *critical mass* in crowded source markets.
- The tour operators’ experience in developing marketing materials for a given source market helps to ensure that the specific marketing treatments *resonate* with the consumers in that market, in terms of their rational and emotive needs and motivators for purchase.
- The tour operators have well-established business systems to *convert* consumer inquiries into a sale, finding the specific destination and product bundle that is best suited to the consumer’s requirements.

However, these arrangements between government tourism authorities and tour operators also break down as a consequence of the final two hurdles. It can be difficult to control how a tour operator positions a destination to its customers; under economic pressure, an operator may cut back on the marketing it invests in some destinations or resort to discounts and promotions that do not deliver the types of travelers sought by the destination government and suppliers. Conversely, once a destination has become popular, local suppliers may seek to boost rates (and governments to raise fees) to levels where the operator has a strong incentive to move passengers to other products. This ongoing tension between the operator and suppliers, combined with the “export” of a significant proportion of tourism spending (and profits) to the operators, has led many destinations to view outsourcing marketing to large tour operators as a less than optimal strategy for driving tourism growth.

Over just the last three years, however, the structure of the travel distribution value chain has changed radically, opening new opportunities for collaborative destination marketing among diverse public and private stakeholders. A series of three disruptive changes have triggered and reinforced one another, a domino effect that has changed the environment to such a degree that T&T marketers need to reexamine long-held assumptions about what constitutes best practices in travel marketing. Briefly, these changes are the following:

- **Rapid growth in consumers’ online travel research activity.** More than in any other sector of the economy, the Internet has radically changed the way that consumers shop for travel. Leisure travel in particular has always been a high-involvement purchase, with consumers seeking a broad range of information as part of an extended shopping

process. However, few anticipated the magnitude of latent desire to spend time learning more about a broader range of alternatives and find the best fit (or deals). Consumers' direct, proactive involvement in the research process opens a whole new set of opportunities for travel marketers to reach specific target groups.

- **Increased transparency into the travel-buying process.** When consumers conducted the majority of their research off line, using newspapers, magazines, brochures, and guide books, it was practically impossible for travel marketers to discern what communications played a role in a consumer's purchase process, or to identify which consumers had reached a point in their research process where proactive direct marketing would be cost effective. With most consumers conducting at least a portion of their research online (research suggests that 80–85 percent do) it is now possible for travel marketers to capture much greater insight into who is interested in what types of travel and for what purpose, and where they are in their decision-making process.
- **Innovative new intermediary business models.** Traceability of consumer buying behavior has effectively broken what had been one of the most fundamental premises of travel distribution—that intermediaries could get paid by suppliers only for “owning” and processing a booking transaction. In the past, a travel agent could bear significant cost to have a storefront in a good location and could spend valuable time educating a consumer about a destination and product—and still not receive any compensation were the consumer to book directly with the supplier. Today, the traceability of consumer's research activity has made it commonplace for suppliers to pay for leads and referrals from a wide range of online intermediaries, including Google, Yahoo, meta-search sites, and user-contributed content sites. Most of these intermediary players do not hold travel product inventory or even have the capacity to process a transaction—simply directing visitors to a supplier site that has a high conversion rate is enough to claim a significant portion of the travel distribution value chain. This type of transparent referral business model can be directly applied to a wide range of collaborative marketing efforts, including destination-centric collaboration among public and private stakeholders.

These recent changes in the structure of travel distribution have thus made it far more practical for a group of local suppliers and government tourism ministries to collaborate on consumer marketing campaigns.

Both online and traditional advertising can be designed to drive inquiries to tailored websites, providing the measurability that is critical to surmounting the five most common failures in tourism marketing. Online media and search keywords can be purchased at smaller scale than traditional media, focusing on targeted audiences, largely addressing the issue of critical mass. Response and click-through behaviors can be rigorously tracked and measured, allowing campaigns to be tailored for resonance with target audiences. Well-designed destination websites can qualify visitors and forward leads in a form that enables suppliers to convert from interest to sales effectively. Further, the direct consumer contact initiated through such an approach can be developed into an ongoing relationship that can be queried to ensure that consumers' travel experiences have been positive.

Putting such an approach into action requires a combination of established best practices and investment in commercial analytical marketing capabilities:

- **A public-private partnership on the primary tourism board.** As vividly demonstrated at the World Economic Forum's Travel & Tourism simulation in Jordan in June 2004, tourism boards that operate solely as a government services or as a trade group are far less effective than blended partnership boards that have a clear charter stipulating their constituents' roles, objectives, and criteria for success.
- **A clear and realistic tourism strategy.** Specific goals and objectives for tourism development must be grounded in an understanding of the dynamics of the travel industry, including how (and when) suppliers make investment and capacity decisions, and—most importantly—a realistic appraisal of the choices consumers have among destinations, and how well a proposed offering is likely to compare.
- **Actionable consumer segmentation.** In order for destinations to succeed in achieving critical mass and resonance, they must be able to define, understand, and address a very specific set of target market segments. Broad socio-demographic definitions do not have enough resolution to allow media buying that is sufficiently precise, nor do they provide enough insight into target consumer groups to develop product and message and offer treatments that will resonate. Best-in-class direct marketers have far outpaced most travel marketers in their ability to use a combination of primary consumer research, database analytics, and empirical testing to design systematic processes for generating target consumer inquiries cost-effectively.

- **Consumer-centric website design.** In order for conversion objectives to be met, direct-response “landing pages” must pick up from where the campaign leaves off, enticing consumers to explore further and engage with destination content as part of their research. Just as importantly, the site must be effective in qualifying visitors—in helping refine an understanding of what they are looking for so that referrals to partners are both relevant to the consumer and worthwhile for the supplier to pursue.
- **Rigorous analytical planning, tracking, and measurement.** Experience with world-class direct marketers has established that effective targeting and tailoring of direct marketing programs can deliver an initial 30–50 percent improvement in marketing return on investment (ROI) over typical database marketing approaches. More surprising is that an additional improvement of the same order of magnitude is usually possible by continuously fine-tuning inquiry generation, marketing treatment design, and conversion tactics. It is only by setting up a highly robust, analytical foundation for planning, testing, and measuring specific marketing programs against each target consumer population that returns are maximized. Further, such an analytical foundation provides the basis for ensuring that all stakeholders understand the performance of the collaborative efforts and the benefit realized over other alternatives.

In many ways, the stakes in tourism marketing have never been greater. These new opportunities to drive tourism growth through consumer-centric marketing will only increase the market price for sources of consumer inquiries, such as tourism-related search words. Those destinations that find a way to work together toward a common set of target consumer objectives and build the analytical capabilities needed to take an ROI-based approach to their marketing will likely be the only groups to ignite and sustain positive-feedback growth and ensure that their tourism sector delivers its social and economic development potential.

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# Part 2

## Country/Economy Profiles and Data Presentation



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# 2.1

## Country/Economy Profiles





# How to Read the Country/Economy Profiles

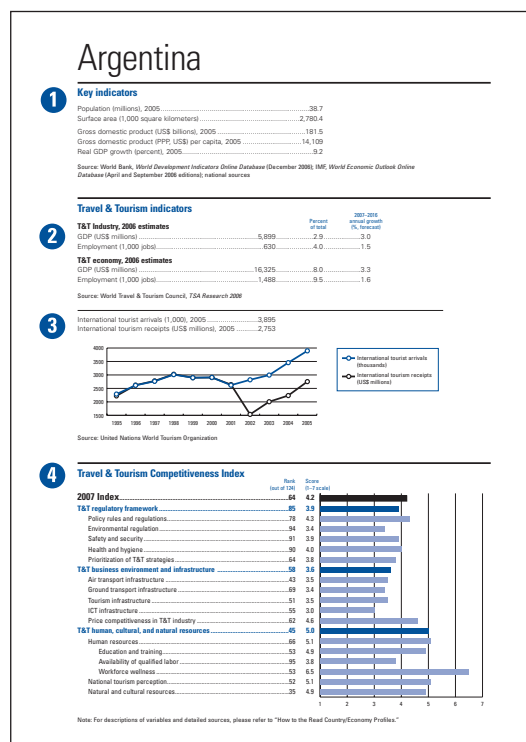
THIERRY GEIGER, Economist, World Economic Forum

This section presents two-page profiles for all the 124 economies included in the *Travel & Tourism Competitiveness Report 2007*.

## Left-hand page

### 1 Key indicators

The first section presents several key indicators that give a sense of the size of the country and its economy. Population and surface area figures are from the World Bank's *World Development Indicators Online Database*. GDP numbers are from the IMF's *World Economic Outlook Online Database*.



## Travel & Tourism indicators

The second section presents Travel & Tourism (T&T) indicators that aim to provide a measure of the past, current, and projected future activity of Travel & Tourism in each an economy. This section is split into two parts:

**2** The first part presents data from the Tourism Satellite Accounting Research carried out annually by the World Travel & Tourism Council (WTTC). Developed by the United Nations World Tourism Organization (UNWTO), the Organisation for Economic Co-operation and Development (OECD), and Eurostat, the Tourism Satellite (TSA) framework is a statistical tool—including concepts, definitions, aggregates, classifications, and tables—that is compatible with international national accounting guidelines and allows for valid international comparisons. The TSA also makes these estimates comparable with other internationally recognized macroeconomic aggregates and compilations. Using the TSA approach, WTTC estimates the current and projected future economic contribution of Travel & Tourism in terms of an economy's GDP and employment. WTTC defines the **T&T industry** as a narrow perspective of T&T activity that captures the production-side industry contribution (that is, direct impact only). The **T&T economy** is a broader perspective of Travel & Tourism that takes into consideration the direct as well as the indirect contributions by traditional travel service providers and industry suppliers within the resident economy. This latter perspective is used when one wants to understand the total impact of Travel & Tourism on the resident economy. More information regarding WTTC's TSA Research, along with details on the methodology and data, are available at [www.wttc.org/tsa1.htm](http://www.wttc.org/tsa1.htm).

**3** The second part of the T&T indicators presents data on international tourist arrivals and international tourism receipts over the period 1995 to 2005. In some cases data are missing for particular years. The graph shows all available data during this period for each economy. The data were provided by the UNWTO.

The number of **international tourist arrivals**, expressed in thousands, is the most common unit of

measure used to quantify the volume of international tourism for statistical purposes. It includes exclusively overnight visitors—that is, tourists who stay at least one night in a collective or private accommodation in the country visited. Same-day visitors are not included. The number of arrivals does not necessarily correspond to the number of persons. The same person who makes several trips to a given country during a given period will be counted as a new arrival each time.

**International tourism receipts**, expressed in millions of current US\$, are the receipts earned by a destination country from inbound tourism and cover all tourism receipts resulting from expenditures made by visitors from abroad, on, for instance, lodging, food and drinks, fuel, transport in the country, entertainment, shopping, and so on. This measure includes receipts generated by overnight as well as by same-day trips. Receipts from same-day trips can be substantial, as in the case of countries where a lot of shopping for goods and services takes place by visitors from neighboring countries.

#### 4 Travel & Tourism Competitiveness Index

The third section of the page presents the economy's performance on the Travel & Tourism Competitiveness Index (TTCI) and its various components. For further analysis, the Data Tables at the end of the *Report* provide detailed rankings and scores for each of the 58 variables included in the TTCI.

#### Right-hand page

#### 5 Travel & Tourism competitiveness balance sheet

The right-hand page of each profile forms an economy's competitiveness balance sheet. It allows the reader to quickly identify the variables that constitute the relative strengths (competitive advantages) and the relative weaknesses (competitive disadvantages) of an economy in terms of T&T competitiveness. Variables are organized by pillar, with advantages listed on the left-hand side and disadvantages listed on the right-hand side.

To identify variables as advantage or disadvantages, the following rules are applied:

- For the top 10 economies in the overall Travel & Tourism Competitiveness Index (TTCI), any variables on which the economy is ranked 10th or higher are considered to be advantages. Any variables ranked below 10 are considered to be disadvantages. For example, the United States, ranked 5th overall, has the indicator “airport density” (8th) listed as an advantage, while the indicator “stringency of environmental regulations” (21st) is considered as a disadvantage.
- For those economies ranked from 11th to 50th on the overall TTCI, any variables with a higher rank than the economy's overall rank are considered to be advantages. Any variables ranked equal to, or lower than, the economy's overall rank are disadvantages. For example, Slovak Republic ranks 37th overall. Thus, the quality of railroad infrastructure on which the country ranks 27th is an advantage, while the number of World Heritage sites (40th) and carbon dioxide damage (81st) both constitute disadvantages.
- For the economies with an overall rank on the TTCI lower than 50, any variables for which the economy has a rank of 50 or higher are considered to be advantages. Any variables ranked below 50 are considered to be disadvantages. For example, ranked 69th overall, Guatemala has the variable “nationally protected areas” (16th) listed as an advantage, while the variable “Ticket taxes and airport charges” (112th) is a disadvantage.

5

Argentina

National competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               |          | COMPETITIVE DISADVANTAGES                                |          |
|------------------------------------------------------|----------|----------------------------------------------------------|----------|
|                                                      | Rank/128 |                                                          | Rank/128 |
| <b>Policy rules and regulations</b>                  |          |                                                          |          |
| 1.04 Visa requirements                               | 1        | 1.02 Property rights                                     | 121      |
|                                                      |          | 1.03 Rules governing foreign direct investment           | 111      |
|                                                      |          | 1.05 Openness of bilateral Air Service Agreements        | 75       |
| <b>Safety and security</b>                           |          |                                                          |          |
| 3.01 Business costs of terrorism                     | 12       | 1.01 Foreign ownership restrictions                      | 63       |
| <b>Health and hygiene</b>                            |          |                                                          |          |
| 4.02 Physician density                               | 29       | <b>Environmental regulation</b>                          |          |
| <b>Prioritization of Travel &amp; Tourism</b>        |          |                                                          |          |
| 5.04 T&T for attendance                              | 23       | 2.02 Clarity and stability of environmental regulations  | 110      |
|                                                      |          | 2.03 Government prioritization of sustainable T&T        | 91       |
|                                                      |          | 2.01 Stringency of environmental regulation              | 87       |
| <b>Air transport infrastructure</b>                  |          |                                                          |          |
| 6.04 Airport density                                 | 12       | <b>Safety and security</b>                               |          |
| 6.02 Available seat kilometers                       | 26       | 3.02 Reliability of police services                      | 108      |
| 6.05 Number of operating airlines                    | 42       | 3.03 Business costs of crime and violence                | 105      |
| <b>Tourism infrastructure</b>                        |          |                                                          |          |
| 8.02 Presence of major car rental companies          | 35       | <b>Health and hygiene</b>                                |          |
| <b>Price competitiveness in the T&amp;T industry</b> |          | 4.01 Gov't efforts to reduce health risks from pandemics | 114      |
| 10.02 Purchasing power parity                        | 34       | <b>Prioritization of Travel &amp; Tourism</b>            |          |
| 10.04 Fuel price level                               | 46       | 5.02 T&T government expenditure                          | 77       |
|                                                      |          | 5.03 Effectiveness of marketing and branding             | 76       |
|                                                      |          | 5.01 Government prioritization of the T&T industry       | 69       |
| <b>Air transport infrastructure</b>                  |          |                                                          |          |
| 6.01 Quality of air transport infrastructure         | 84       | <b>Ground transport infrastructure</b>                   |          |
| 6.06 International air transport network             | 85       | 7.02 Railroad infrastructure                             | 56       |
| 6.03 Departures per 1,000 population                 | 52       | 7.01 Road infrastructure                                 | 65       |
| <b>Ground transport infrastructure</b>               |          |                                                          |          |
| 7.02 Railroad infrastructure                         | 56       | 7.03 Port infrastructure                                 | 63       |
| 7.01 Road infrastructure                             | 65       | 7.04 Domestic transport network                          | 68       |
| <b>Tourism infrastructure</b>                        |          |                                                          |          |
| 8.03 ATMs accepting Visa cards                       | 58       | <b>ICT infrastructure</b>                                |          |
| 8.01 Hotel rooms                                     | 53       | 9.02 Telephone fixed                                     | 57       |
| <b>ICT infrastructure</b>                            |          |                                                          |          |
| 9.02 Telephone fixed                                 | 57       | 9.01 Extent of business Internet use                     | 55       |
| 9.01 Extent of business Internet use                 | 55       | 9.03 Internet users                                      | 52       |
| <b>Price competitiveness in the T&amp;T industry</b> |          |                                                          |          |
| 10.03 Extent and effect of taxation                  | 118      | <b>Human resources</b>                                   |          |
| 10.01 Ticket taxes and airport charges               | 81       | 11.06 Hiring and firing practices                        | 118      |
| <b>Human resources</b>                               |          |                                                          |          |
| 11.06 Hiring and firing practices                    | 118      | 11.03 Quality of the educational system                  | 99       |
| 11.03 Quality of the educational system              | 99       | 11.08 HIV prevalence                                     | 82       |
| 11.08 HIV prevalence                                 | 82       | 11.05 Extent of staff training                           | 72       |
| 11.05 Extent of staff training                       | 72       | 11.10 Tuberculosis incidence                             | 54       |
| 11.10 Tuberculosis incidence                         | 54       | <b>National tourism perception</b>                       |          |
| <b>National tourism perception</b>                   |          |                                                          |          |
| 12.02 Attitude toward tourists                       | 85       | <b>Natural and cultural resources</b>                    |          |
| <b>Natural and cultural resources</b>                |          |                                                          |          |
| 13.02 Carbon dioxide damage                          | 79       | <b>Business concern for ecosystems</b>                   |          |
| 13.04 Business concern for ecosystems                | 71       | <b>Nationally protected areas</b>                        |          |
| 13.05 Nationally protected areas                     | 66       |                                                          |          |

# List of Countries/Economies

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| China                  | 170  | Mauritius             | 268  | Zimbabwe             | 366  |
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| Ecuador                | 186  | Netherlands           | 284  |                      |      |
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| El Salvador            | 190  | Nicaragua             | 288  |                      |      |
| Estonia                | 192  | Nigeria               | 290  |                      |      |
| Ethiopia               | 194  | Norway                | 292  |                      |      |
| Finland                | 196  | Pakistan              | 294  |                      |      |
| France                 | 198  | Panama                | 296  |                      |      |
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| Greece                 | 206  | Poland                | 304  |                      |      |
| Guatemala              | 208  | Portugal              | 306  |                      |      |
| Guyana                 | 210  | Qatar                 | 308  |                      |      |
| Honduras               | 212  | Romania               | 310  |                      |      |
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# Albania

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 3.1   |
| Surface area (1,000 square kilometers) .....              | 28.8  |
| Gross domestic product (US\$ billions), 2005 .....        | 8.4   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 5,405 |
| Real GDP growth (percent), 2005 .....                     | 5.5   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

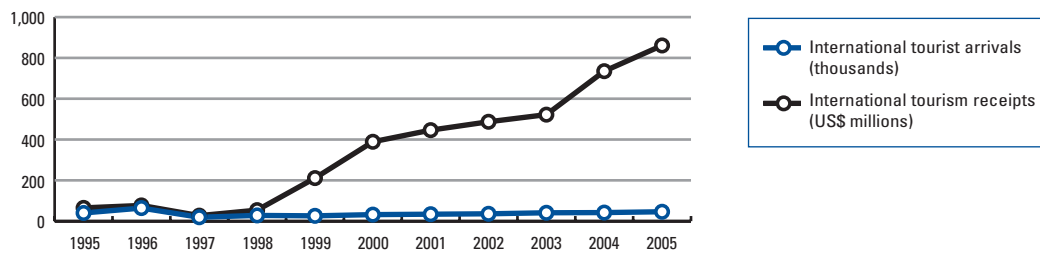
|                               |     | Percent<br>of total | 2007–2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-----|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 346 | 3.8                 | 7.5                                         |
| Employment (1,000 jobs) ..... | 44  | 3.1                 | 3.9                                         |

### T&T economy, 2006 estimates

|                               |       |      |     |
|-------------------------------|-------|------|-----|
| GDP (US\$ millions) .....     | 1,072 | 11.9 | 7.4 |
| Employment (1,000 jobs) ..... | 138   | 9.6  | 3.8 |

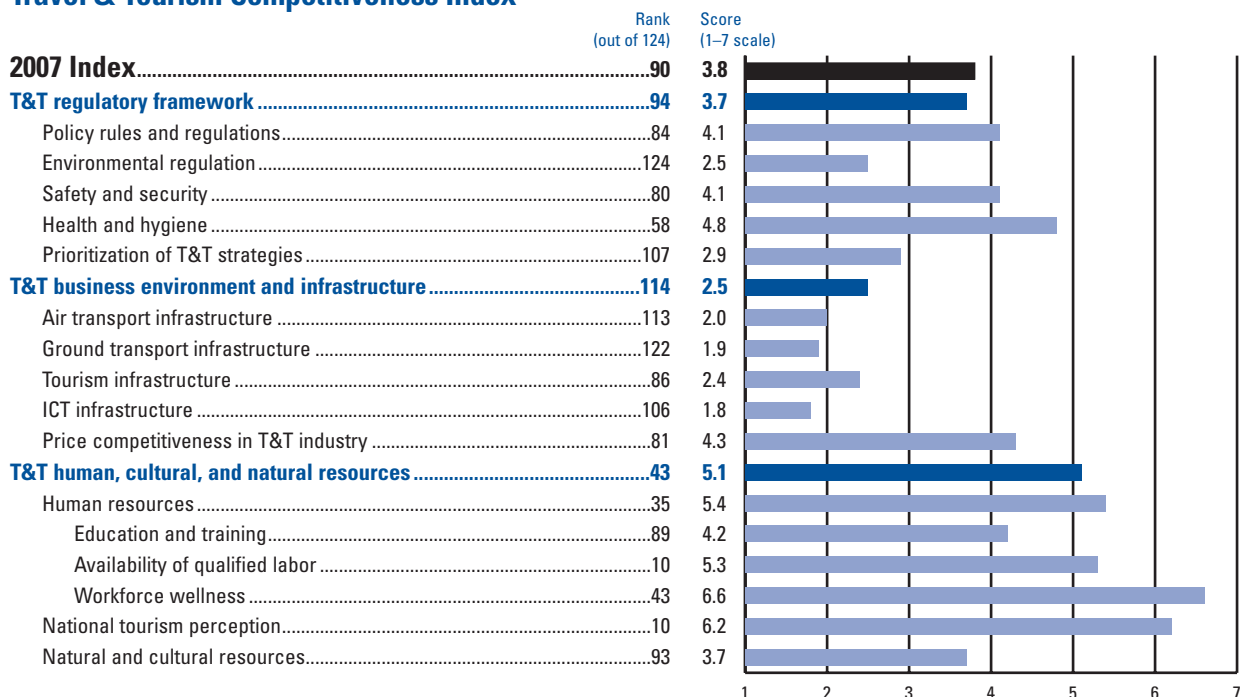
Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2005 .....         | 46  |
| International tourism receipts (US\$ millions), 2005 ..... | 861 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index



Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                        | Rank/124 | COMPETITIVE DISADVANTAGES                                        | Rank/124 |
|-----------------------------------------------|----------|------------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>           |          | <b>Policy rules and regulations</b>                              |          |
| 1.04 Visa requirements .....                  | 1        | 1.02 Property rights .....                                       | 116      |
| <b>Health and hygiene</b>                     |          | 1.01 Foreign ownership restrictions .....                        | 113      |
| 4.04 Access to improved drinking water .....  | 42       | 1.03 Rules governing foreign direct investment .....             | 110      |
| 4.03 Access to improved sanitation .....      | 49       | 1.05 Openness of bilateral Air Service Agreements .....          | 66       |
| <b>Prioritization of Travel &amp; Tourism</b> |          | <b>Environmental regulation</b>                                  |          |
| 5.02 T&T government expenditure .....         | 44       | 2.01 Stringency of environmental regulation .....                | 124      |
| <b>Human resources</b>                        |          | 2.02 Clarity and stability of environmental regulations .....    | 123      |
| 11.01 Primary education enrollment .....      | 1        | 2.03 Government prioritization of sustainable T&T .....          | 116      |
| 11.09 Malaria incidence .....                 | 1        | <b>Safety and security</b>                                       |          |
| 11.07 Ease of hiring foreign labor .....      | 8        | 3.01 Business costs of terrorism .....                           | 91       |
| 11.06 Hiring and firing practices .....       | 18       | 3.03 Business costs of crime and violence .....                  | 77       |
| 11.08 HIV prevalence .....                    | 25       | 3.02 Reliability of police services .....                        | 68       |
| 11.10 Tuberculosis incidence .....            | 38       | <b>Health and hygiene</b>                                        |          |
| <b>National tourism perception</b>            |          | 4.01 Gov't efforts to reduce health risks from pandemics .....   | 104      |
| 12.01 Tourism openness .....                  | 4        | 4.02 Physician density .....                                     | 69       |
| <b>Natural and cultural resources</b>         |          | <b>Prioritization of Travel &amp; Tourism</b>                    |          |
| 13.02 Carbon dioxide damage .....             | 27       | 5.03 Effectiveness of marketing and branding .....               | 120      |
|                                               |          | 5.04 T&T fair attendance .....                                   | 90       |
|                                               |          | 5.01 Government prioritization of the T&T industry .....         | 86       |
|                                               |          | <b>Air transport infrastructure</b>                              |          |
|                                               |          | 6.02 Available seat kilometers .....                             | 111      |
|                                               |          | 6.06 International air transport network .....                   | 104      |
|                                               |          | 6.01 Quality of air transport infrastructure .....               | 103      |
|                                               |          | 6.05 Number of operating airlines .....                          | 91       |
|                                               |          | 6.04 Airport density .....                                       | 90       |
|                                               |          | 6.03 Departures per 1,000 population .....                       | 71       |
|                                               |          | <b>Ground transport infrastructure</b>                           |          |
|                                               |          | 7.04 Domestic transport network .....                            | 121      |
|                                               |          | 7.02 Railroad infrastructure .....                               | 115      |
|                                               |          | 7.01 Road infrastructure .....                                   | 114      |
|                                               |          | 7.03 Port infrastructure .....                                   | 106      |
|                                               |          | <b>Tourism infrastructure</b>                                    |          |
|                                               |          | 8.01 Hotel rooms .....                                           | 76       |
|                                               |          | 8.03 ATMs accepting Visa cards .....                             | 73       |
|                                               |          | 8.02 Presence of major car rental companies .....                | 66       |
|                                               |          | <b>ICT infrastructure</b>                                        |          |
|                                               |          | 9.01 Extent of business Internet use .....                       | 119      |
|                                               |          | 9.02 Internet users .....                                        | 100      |
|                                               |          | 9.03 Telephone lines .....                                       | 84       |
|                                               |          | <b>Price competitiveness in the T&amp;T industry</b>             |          |
|                                               |          | 10.04 Fuel price level .....                                     | 98       |
|                                               |          | 10.03 Extent and effect of taxation .....                        | 90       |
|                                               |          | 10.02 Purchasing power parity .....                              | 61       |
|                                               |          | 10.01 Ticket taxes and airport charges .....                     | 53       |
|                                               |          | <b>Human resources</b>                                           |          |
|                                               |          | 11.04 Local availability of research and training services ..... | 118      |
|                                               |          | 11.05 Extent of staff training .....                             | 111      |
|                                               |          | 11.03 Quality of the educational system .....                    | 80       |
|                                               |          | 11.02 Secondary education enrollment .....                       | 76       |
|                                               |          | 11.11 Life expectancy .....                                      | 53       |

(Disadvantages cont'd. from bottom of right column)

| COMPETITIVE DISADVANTAGES                           | Rank/124 |
|-----------------------------------------------------|----------|
| <b>National tourism perception</b>                  |          |
| 12.03 Recommendation to extend business trips ..... | 87       |
| 12.02 Attitude toward tourists .....                | 68       |
| <b>Natural and cultural resources</b>               |          |
| 13.04 Business concern for ecosystems .....         | 122      |
| 13.03 Nationally protected areas .....              | 87       |
| 13.01 Number of World Heritage sites .....          | 73       |

&lt;&lt;&lt; (Cont'd. on bottom of left column)



# Algeria

## Key indicators

|                                                           |         |
|-----------------------------------------------------------|---------|
| Population (millions), 2005 .....                         | 32.9    |
| Surface area (1,000 square kilometers) .....              | 2,381.7 |
| Gross domestic product (US\$ billions), 2005 .....        | 102.0   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 7,189   |
| Real GDP growth (percent), 2005 .....                     | 5.3     |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

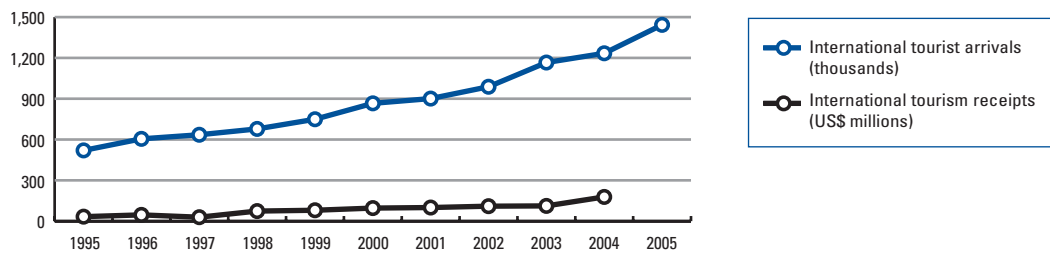
|                               |       | Percent<br>of total | 2007–2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 1,581 | 1.5                 | 7.0                                         |
| Employment (1,000 jobs) ..... | 121   | 1.4                 | 5.2                                         |

### T&T economy, 2006 estimates

|                               |       |     |     |
|-------------------------------|-------|-----|-----|
| GDP (US\$ millions) .....     | 7,095 | 6.8 | 4.9 |
| Employment (1,000 jobs) ..... | 496   | 5.9 | 3.2 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 1,443 |
| International tourism receipts (US\$ millions), 2004 ..... | 178   |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1–7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>93</b>            | <b>3.7</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>89</b>            | <b>3.8</b>           |
| Policy rules and regulations .....                           | 113                  | 3.4                  |
| Environmental regulation .....                               | 82                   | 3.7                  |
| Safety and security .....                                    | 74                   | 4.2                  |
| Health and hygiene .....                                     | 53                   | 4.9                  |
| Prioritization of T&T strategies .....                       | 109                  | 2.9                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>93</b>            | <b>2.8</b>           |
| Air transport infrastructure .....                           | 101                  | 2.3                  |
| Ground transport infrastructure .....                        | 78                   | 3.0                  |
| Tourism infrastructure .....                                 | 114                  | 1.7                  |
| ICT infrastructure .....                                     | 118                  | 1.6                  |
| Price competitiveness in T&T industry .....                  | 9                    | 5.5                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>97</b>            | <b>4.4</b>           |
| Human resources .....                                        | 86                   | 4.8                  |
| Education and training .....                                 | 83                   | 4.3                  |
| Availability of qualified labor .....                        | 107                  | 3.7                  |
| Workforce wellness .....                                     | 57                   | 6.5                  |
| National tourism perception .....                            | 114                  | 4.0                  |
| Natural and cultural resources .....                         | 65                   | 4.3                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               |                                                           | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                           | Rank/124 |
|------------------------------------------------------|-----------------------------------------------------------|----------|------------------------------------------------------|-----------------------------------------------------------|----------|
| <b>Safety and security</b>                           |                                                           |          | <b>Policy rules and regulations</b>                  |                                                           |          |
| 3.02                                                 | Reliability of police services .....                      | 33       | 1.04                                                 | Visa requirements .....                                   | 113      |
| <b>Health and hygiene</b>                            |                                                           |          | 1.05                                                 | Openness of bilateral Air Service Agreements .....        | 98       |
| 4.03                                                 | Access to improved sanitation .....                       | 45       | 1.03                                                 | Rules governing foreign direct investment .....           | 91       |
| 4.01                                                 | Gov't efforts to reduce health risks from pandemics ..... | 48       | 1.01                                                 | Foreign ownership restrictions.....                       | 84       |
| <b>Price competitiveness in the T&amp;T industry</b> |                                                           |          | 1.02                                                 | Property rights.....                                      | 66       |
| 10.04                                                | Fuel price level .....                                    | 3        | <b>Environmental regulation</b>                      |                                                           |          |
| 10.03                                                | Extent and effect of taxation.....                        | 32       | 2.03                                                 | Government prioritization of sustainable T&T .....        | 89       |
| 10.01                                                | Ticket taxes and airport charges.....                     | 41       | 2.02                                                 | Clarity and stability of environmental regulations .....  | 79       |
| <b>Human resources</b>                               |                                                           |          | 2.01                                                 | Stringency of environmental regulation .....              | 72       |
| 11.01                                                | Primary education enrollment .....                        | 1        | <b>Safety and security</b>                           |                                                           |          |
| 11.08                                                | HIV prevalence .....                                      | 25       | 3.01                                                 | Business costs of terrorism .....                         | 114      |
| <b>Natural and cultural resources</b>                |                                                           |          | 3.03                                                 | Business costs of crime and violence.....                 | 80       |
| 13.01                                                | Number of World Heritage sites .....                      | 30       | <b>Health and hygiene</b>                            |                                                           |          |
|                                                      |                                                           |          | 4.02                                                 | Physician density .....                                   | 75       |
|                                                      |                                                           |          | 4.04                                                 | Access to improved drinking water .....                   | 65       |
|                                                      |                                                           |          | <b>Prioritization of Travel &amp; Tourism</b>        |                                                           |          |
|                                                      |                                                           |          | 5.02                                                 | T&T government expenditure .....                          | 105      |
|                                                      |                                                           |          | 5.03                                                 | Effectiveness of marketing and branding .....             | 94       |
|                                                      |                                                           |          | 5.01                                                 | Government prioritization of the T&T industry.....        | 82       |
|                                                      |                                                           |          | 5.04                                                 | T&T fair attendance .....                                 | 70       |
|                                                      |                                                           |          | <b>Air transport infrastructure</b>                  |                                                           |          |
|                                                      |                                                           |          | 6.01                                                 | Quality of air transport infrastructure .....             | 91       |
|                                                      |                                                           |          | 6.06                                                 | International air transport network .....                 | 88       |
|                                                      |                                                           |          | 6.05                                                 | Number of operating airlines.....                         | 85       |
|                                                      |                                                           |          | 6.04                                                 | Airport density .....                                     | 80       |
|                                                      |                                                           |          | 6.02                                                 | Available seat kilometers.....                            | 72       |
|                                                      |                                                           |          | 6.03                                                 | Departures per 1,000 population.....                      | 66       |
|                                                      |                                                           |          | <b>Ground transport infrastructure</b>               |                                                           |          |
|                                                      |                                                           |          | 7.04                                                 | Domestic transport network .....                          | 81       |
|                                                      |                                                           |          | 7.01                                                 | Road infrastructure .....                                 | 79       |
|                                                      |                                                           |          | 7.03                                                 | Port infrastructure .....                                 | 78       |
|                                                      |                                                           |          | 7.02                                                 | Railroad infrastructure .....                             | 72       |
|                                                      |                                                           |          | <b>Tourism infrastructure</b>                        |                                                           |          |
|                                                      |                                                           |          | 8.03                                                 | ATMs accepting Visa cards .....                           | 115      |
|                                                      |                                                           |          | 8.02                                                 | Presence of major car rental companies.....               | 102      |
|                                                      |                                                           |          | 8.01                                                 | Hotel rooms.....                                          | 77       |
|                                                      |                                                           |          | <b>ICT infrastructure</b>                            |                                                           |          |
|                                                      |                                                           |          | 9.01                                                 | Extent of business Internet use .....                     | 123      |
|                                                      |                                                           |          | 9.02                                                 | Internet users .....                                      | 96       |
|                                                      |                                                           |          | 9.03                                                 | Telephone lines.....                                      | 88       |
|                                                      |                                                           |          | <b>Price competitiveness in the T&amp;T industry</b> |                                                           |          |
|                                                      |                                                           |          | 10.02                                                | Purchasing power parity .....                             | 51       |
|                                                      |                                                           |          | <b>Human resources</b>                               |                                                           |          |
|                                                      |                                                           |          | 11.07                                                | Ease of hiring foreign labor .....                        | 117      |
|                                                      |                                                           |          | 11.04                                                | Local availability of research and training services..... | 100      |
|                                                      |                                                           |          | 11.05                                                | Extent of staff training.....                             | 98       |
|                                                      |                                                           |          | 11.03                                                | Quality of the educational system .....                   | 92       |
|                                                      |                                                           |          | 11.06                                                | Hiring and firing practices.....                          | 81       |
|                                                      |                                                           |          | 11.02                                                | Secondary education enrollment.....                       | 73       |
|                                                      |                                                           |          | 11.11                                                | Life expectancy .....                                     | 66       |
|                                                      |                                                           |          | 11.10                                                | Tuberculosis incidence .....                              | 56       |

(Disadvantages cont'd. from bottom of right column)

<<< (Cont'd. on bottom of left column)

# Angola

## Key indicators

|                                                           |         |
|-----------------------------------------------------------|---------|
| Population (millions), 2005 .....                         | 15.9    |
| Surface area (1,000 square kilometers) .....              | 1,246.7 |
| Gross domestic product (US\$ billions), 2005 .....        | 32.8    |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 2,813   |
| Real GDP growth (percent), 2005 .....                     | 20.6    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

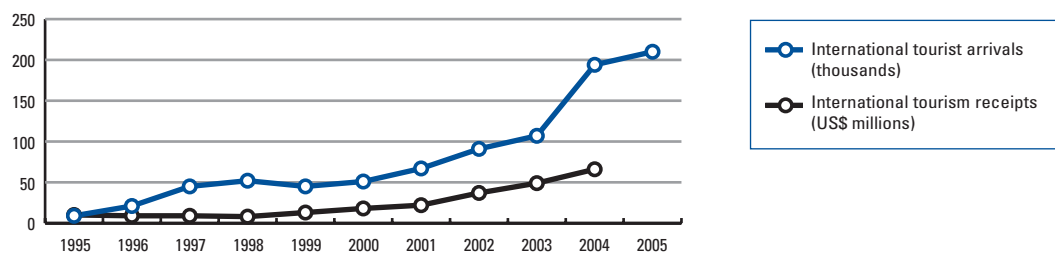
|                               |     | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-----|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 241 | 3.5                 | 2.4                                         |
| Employment (1,000 jobs) ..... | 96  | 2.7                 | 3.9                                         |

### T&T economy, 2006 estimates

|                               |       |      |     |
|-------------------------------|-------|------|-----|
| GDP (US\$ millions) .....     | 2,793 | 40.5 | 2.2 |
| Employment (1,000 jobs) ..... | 1,179 | 33.3 | 3.7 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2005 .....         | 210 |
| International tourism receipts (US\$ millions), 2004 ..... | 66  |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>122</b>           | <b>2.9</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>122</b>           | <b>2.9</b>           |
| Policy rules and regulations .....                           | 121                  | 2.9                  |
| Environmental regulation .....                               | 115                  | 2.9                  |
| Safety and security .....                                    | 92                   | 3.8                  |
| Health and hygiene .....                                     | 119                  | 2.6                  |
| Prioritization of T&T strategies .....                       | 121                  | 2.3                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>113</b>           | <b>2.5</b>           |
| Air transport infrastructure .....                           | 98                   | 2.3                  |
| Ground transport infrastructure .....                        | 120                  | 2.0                  |
| Tourism infrastructure .....                                 | 115                  | 1.6                  |
| ICT infrastructure .....                                     | 121                  | 1.6                  |
| Price competitiveness in T&T industry .....                  | 30                   | 5.0                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>124</b>           | <b>3.3</b>           |
| Human resources .....                                        | 118                  | 3.1                  |
| Education and training .....                                 | 122                  | 2.4                  |
| Availability of qualified labor .....                        | 77                   | 4.2                  |
| Workforce wellness .....                                     | 115                  | 2.7                  |
| National tourism perception .....                            | 121                  | 3.6                  |
| Natural and cultural resources .....                         | 119                  | 3.0                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               |                                    | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                           | Rank/124 |
|------------------------------------------------------|------------------------------------|----------|------------------------------------------------------|-----------------------------------------------------------|----------|
| <b>Safety and security</b>                           |                                    |          | <b>Policy rules and regulations</b>                  |                                                           |          |
| 3.01                                                 | Business costs of terrorism .....  | 18       | 1.05                                                 | Openness of bilateral Air Service Agreements .....        | 121      |
| <b>Air transport infrastructure</b>                  |                                    |          | 1.01                                                 | Foreign ownership restrictions.....                       | 119      |
| 6.04                                                 | Airport density .....              | 30       | 1.04                                                 | Visa requirements .....                                   | 113      |
| <b>Price competitiveness in the T&amp;T industry</b> |                                    |          | 1.02                                                 | Property rights.....                                      | 108      |
| 10.04                                                | Fuel price level .....             | 14       | 1.03                                                 | Rules governing foreign direct investment .....           | 63       |
| 10.03                                                | Extent and effect of taxation..... | 35       | <b>Environmental regulation</b>                      |                                                           |          |
| <b>Natural and cultural resources</b>                |                                    |          | 2.01                                                 | Stringency of environmental regulation .....              | 120      |
| 13.02                                                | Carbon dioxide damage.....         | 45       | 2.02                                                 | Clarity and stability of environmental regulations .....  | 114      |
|                                                      |                                    |          | 2.03                                                 | Government prioritization of sustainable T&T .....        | 102      |
|                                                      |                                    |          | <b>Safety and security</b>                           |                                                           |          |
|                                                      |                                    |          | 3.03                                                 | Business costs of crime and violence.....                 | 115      |
|                                                      |                                    |          | 3.02                                                 | Reliability of police services .....                      | 91       |
|                                                      |                                    |          | <b>Health and hygiene</b>                            |                                                           |          |
|                                                      |                                    |          | 4.02                                                 | Physician density .....                                   | 112      |
|                                                      |                                    |          | 4.04                                                 | Access to improved drinking water .....                   | 108      |
|                                                      |                                    |          | 4.03                                                 | Access to improved sanitation .....                       | 104      |
|                                                      |                                    |          | 4.01                                                 | Gov't efforts to reduce health risks from pandemics ..... | 94       |
|                                                      |                                    |          | <b>Prioritization of Travel &amp; Tourism</b>        |                                                           |          |
|                                                      |                                    |          | 5.03                                                 | Effectiveness of marketing and branding .....             | 115      |
|                                                      |                                    |          | 5.01                                                 | Government prioritization of the T&T industry.....        | 110      |
|                                                      |                                    |          | 5.02                                                 | T&T government expenditure .....                          | 105      |
|                                                      |                                    |          | 5.04                                                 | T&T fair attendance .....                                 | 105      |
|                                                      |                                    |          | <b>Air transport infrastructure</b>                  |                                                           |          |
|                                                      |                                    |          | 6.06                                                 | International air transport network .....                 | 113      |
|                                                      |                                    |          | 6.05                                                 | Number of operating airlines.....                         | 107      |
|                                                      |                                    |          | 6.01                                                 | Quality of air transport infrastructure .....             | 99       |
|                                                      |                                    |          | 6.03                                                 | Departures per 1,000 population.....                      | 97       |
|                                                      |                                    |          | 6.02                                                 | Available seat kilometers.....                            | 83       |
|                                                      |                                    |          | <b>Ground transport infrastructure</b>               |                                                           |          |
|                                                      |                                    |          | 7.04                                                 | Domestic transport network .....                          | 123      |
|                                                      |                                    |          | 7.01                                                 | Road infrastructure.....                                  | 122      |
|                                                      |                                    |          | 7.02                                                 | Railroad infrastructure .....                             | 98       |
|                                                      |                                    |          | 7.03                                                 | Port infrastructure .....                                 | 96       |
|                                                      |                                    |          | <b>Tourism infrastructure</b>                        |                                                           |          |
|                                                      |                                    |          | 8.03                                                 | ATMs accepting Visa cards .....                           | 115      |
|                                                      |                                    |          | 8.02                                                 | Presence of major car rental companies.....               | 102      |
|                                                      |                                    |          | 8.01                                                 | Hotel rooms.....                                          | 101      |
|                                                      |                                    |          | <b>ICT infrastructure</b>                            |                                                           |          |
|                                                      |                                    |          | 9.01                                                 | Extent of business Internet use .....                     | 118      |
|                                                      |                                    |          | 9.03                                                 | Telephone lines.....                                      | 113      |
|                                                      |                                    |          | 9.02                                                 | Internet users .....                                      | 107      |
|                                                      |                                    |          | <b>Price competitiveness in the T&amp;T industry</b> |                                                           |          |
|                                                      |                                    |          | 10.02                                                | Purchasing power parity.....                              | 81       |
|                                                      |                                    |          | 10.01                                                | Ticket taxes and airport charges.....                     | 65       |
|                                                      |                                    |          | <b>Human resources</b>                               |                                                           |          |
|                                                      |                                    |          | 11.04                                                | Local availability of research and training services..... | 122      |
|                                                      |                                    |          | 11.11                                                | Life expectancy .....                                     | 121      |
|                                                      |                                    |          | 11.03                                                | Quality of the educational system .....                   | 120      |
|                                                      |                                    |          | 11.09                                                | Malaria incidence.....                                    | 114      |
|                                                      |                                    |          | 11.05                                                | Extent of staff training.....                             | 107      |
|                                                      |                                    |          | 11.08                                                | HIV prevalence .....                                      | 107      |
|                                                      |                                    |          | 11.10                                                | Tuberculosis incidence .....                              | 99       |
|                                                      |                                    |          | 11.06                                                | Hiring and firing practices.....                          | 80       |
|                                                      |                                    |          | 11.07                                                | Ease of hiring foreign labor .....                        | 71       |

(Disadvantages cont'd. from bottom of right column)

<<< (Cont'd. on bottom of left column)

# Argentina

## Key indicators

|                                                           |         |
|-----------------------------------------------------------|---------|
| Population (millions), 2005 .....                         | 38.7    |
| Surface area (1,000 square kilometers) .....              | 2,780.4 |
| Gross domestic product (US\$ billions), 2005 .....        | 181.5   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 14,109  |
| Real GDP growth (percent), 2005 .....                     | 9.2     |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

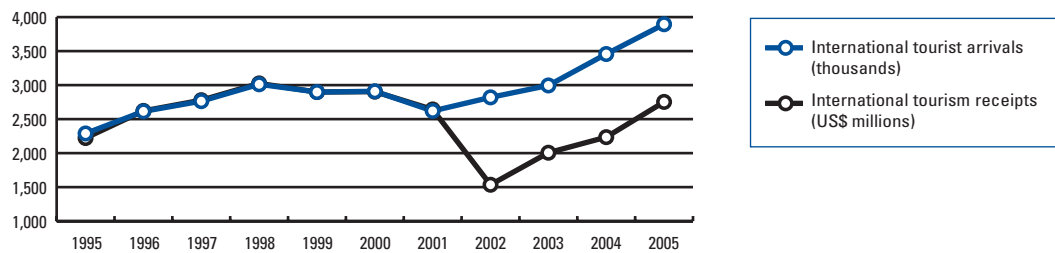
|                               |       | Percent<br>of total | 2007–2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 5,899 | 2.9                 | 3.0                                         |
| Employment (1,000 jobs) ..... | 630   | 4.0                 | 1.5                                         |

### T&T economy, 2006 estimates

|                               |        |     |     |
|-------------------------------|--------|-----|-----|
| GDP (US\$ millions) .....     | 16,325 | 8.0 | 3.3 |
| Employment (1,000 jobs) ..... | 1,488  | 9.5 | 1.6 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 3,895 |
| International tourism receipts (US\$ millions), 2005 ..... | 2,753 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1–7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>64</b>            | <b>4.2</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>85</b>            | <b>3.9</b>           |
| Policy rules and regulations .....                           | 78                   | 4.3                  |
| Environmental regulation .....                               | 94                   | 3.4                  |
| Safety and security .....                                    | 91                   | 3.9                  |
| Health and hygiene .....                                     | 90                   | 4.0                  |
| Prioritization of T&T strategies .....                       | 64                   | 3.8                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>58</b>            | <b>3.6</b>           |
| Air transport infrastructure .....                           | 43                   | 3.5                  |
| Ground transport infrastructure .....                        | 69                   | 3.4                  |
| Tourism infrastructure .....                                 | 51                   | 3.5                  |
| ICT infrastructure .....                                     | 55                   | 3.0                  |
| Price competitiveness in T&T industry .....                  | 62                   | 4.6                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>45</b>            | <b>5.0</b>           |
| Human resources .....                                        | 66                   | 5.1                  |
| Education and training .....                                 | 53                   | 4.9                  |
| Availability of qualified labor .....                        | 95                   | 3.8                  |
| Workforce wellness .....                                     | 53                   | 6.5                  |
| National tourism perception .....                            | 52                   | 5.1                  |
| Natural and cultural resources .....                         | 35                   | 4.9                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               |                                                           | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                           | Rank/124 |
|------------------------------------------------------|-----------------------------------------------------------|----------|------------------------------------------------------|-----------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                  |                                                           |          | <b>Policy rules and regulations</b>                  |                                                           |          |
| 1.04                                                 | Visa requirements .....                                   | 1        | 1.02                                                 | Property rights .....                                     | 121      |
| <b>Safety and security</b>                           |                                                           |          | 1.03                                                 | Rules governing foreign direct investment .....           | 111      |
| 3.01                                                 | Business costs of terrorism .....                         | 12       | 1.05                                                 | Openness of bilateral Air Service Agreements .....        | 75       |
| <b>Health and hygiene</b>                            |                                                           |          | 1.01                                                 | Foreign ownership restrictions.....                       | 63       |
| 4.02                                                 | Physician density .....                                   | 29       | <b>Environmental regulation</b>                      |                                                           |          |
| <b>Prioritization of Travel &amp; Tourism</b>        |                                                           |          | 2.02                                                 | Clarity and stability of environmental regulations .....  | 110      |
| 5.04                                                 | T&T fair attendance .....                                 | 23       | 2.03                                                 | Government prioritization of sustainable T&T .....        | 91       |
| <b>Air transport infrastructure</b>                  |                                                           |          | 2.01                                                 | Stringency of environmental regulation .....              | 87       |
| 6.04                                                 | Airport density .....                                     | 12       | <b>Safety and security</b>                           |                                                           |          |
| 6.02                                                 | Available seat kilometers.....                            | 28       | 3.02                                                 | Reliability of police services .....                      | 108      |
| 6.05                                                 | Number of operating airlines.....                         | 42       | 3.03                                                 | Business costs of crime and violence.....                 | 105      |
| <b>Tourism infrastructure</b>                        |                                                           |          | <b>Health and hygiene</b>                            |                                                           |          |
| 8.02                                                 | Presence of major car rental companies.....               | 35       | 4.01                                                 | Gov't efforts to reduce health risks from pandemics ..... | 114      |
| <b>Price competitiveness in the T&amp;T industry</b> |                                                           |          | <b>Prioritization of Travel &amp; Tourism</b>        |                                                           |          |
| 10.02                                                | Purchasing power parity .....                             | 34       | 5.02                                                 | T&T government expenditure .....                          | 77       |
| 10.04                                                | Fuel price level .....                                    | 46       | 5.03                                                 | Effectiveness of marketing and branding .....             | 75       |
| <b>Human resources</b>                               |                                                           |          | 5.01                                                 | Government prioritization of the T&T industry.....        | 69       |
| 11.01                                                | Primary education enrollment .....                        | 1        | <b>Air transport infrastructure</b>                  |                                                           |          |
| 11.02                                                | Secondary education enrollment.....                       | 25       | 6.01                                                 | Quality of air transport infrastructure .....             | 84       |
| 11.11                                                | Life expectancy .....                                     | 39       | 6.06                                                 | International air transport network .....                 | 55       |
| 11.07                                                | Ease of hiring foreign labor .....                        | 40       | 6.03                                                 | Departures per 1,000 population.....                      | 52       |
| 11.04                                                | Local availability of research and training services..... | 43       | <b>Ground transport infrastructure</b>               |                                                           |          |
| <b>National tourism perception</b>                   |                                                           |          | 7.02                                                 | Railroad infrastructure .....                             | 66       |
| 12.03                                                | Recommendation to extend business trips .....             | 8        | 7.01                                                 | Road infrastructure .....                                 | 65       |
| 12.01                                                | Tourism openness .....                                    | 35       | 7.03                                                 | Port infrastructure .....                                 | 63       |
| <b>Natural and cultural resources</b>                |                                                           |          | 7.04                                                 | Domestic transport network .....                          | 58       |
| 13.01                                                | Number of World Heritage sites .....                      | 24       | <b>Tourism infrastructure</b>                        |                                                           |          |
| 13.05                                                | Risk of malaria and yellow fever .....                    | 49       | 8.03                                                 | ATMs accepting Visa cards .....                           | 56       |
|                                                      |                                                           |          | 8.01                                                 | Hotel rooms.....                                          | 53       |
|                                                      |                                                           |          | <b>ICT infrastructure</b>                            |                                                           |          |
|                                                      |                                                           |          | 9.03                                                 | Telephone lines.....                                      | 57       |
|                                                      |                                                           |          | 9.01                                                 | Extent of business Internet use .....                     | 55       |
|                                                      |                                                           |          | 9.02                                                 | Internet users .....                                      | 52       |
|                                                      |                                                           |          | <b>Price competitiveness in the T&amp;T industry</b> |                                                           |          |
|                                                      |                                                           |          | 10.03                                                | Extent and effect of taxation.....                        | 118      |
|                                                      |                                                           |          | 10.01                                                | Ticket taxes and airport charges.....                     | 81       |
|                                                      |                                                           |          | <b>Human resources</b>                               |                                                           |          |
|                                                      |                                                           |          | 11.06                                                | Hiring and firing practices.....                          | 118      |
|                                                      |                                                           |          | 11.03                                                | Quality of the educational system .....                   | 99       |
|                                                      |                                                           |          | 11.08                                                | HIV prevalence .....                                      | 82       |
|                                                      |                                                           |          | 11.05                                                | Extent of staff training.....                             | 72       |
|                                                      |                                                           |          | 11.10                                                | Tuberculosis incidence .....                              | 54       |
|                                                      |                                                           |          | <b>National tourism perception</b>                   |                                                           |          |
|                                                      |                                                           |          | 12.02                                                | Attitude toward tourists .....                            | 95       |
|                                                      |                                                           |          | <b>Natural and cultural resources</b>                |                                                           |          |
|                                                      |                                                           |          | 13.02                                                | Carbon dioxide damage.....                                | 79       |
|                                                      |                                                           |          | 13.04                                                | Business concern for ecosystems .....                     | 71       |
|                                                      |                                                           |          | 13.03                                                | Nationally protected areas.....                           | 65       |



# Armenia

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 3.0   |
| Surface area (1,000 square kilometers) .....              | 29.8  |
| Gross domestic product (US\$ billions), 2005 .....        | 3.8   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 4,270 |
| Real GDP growth (percent), 2005 .....                     | 13.9  |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

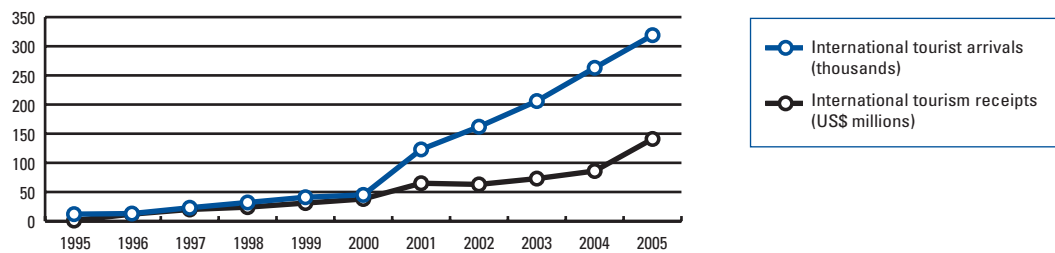
|                               | Percent of total | 2007-2016 annual growth (% forecast) |
|-------------------------------|------------------|--------------------------------------|
| GDP (US\$ millions) .....     | n/a              | n/a                                  |
| Employment (1,000 jobs) ..... | n/a              | n/a                                  |

### T&T economy, 2006 estimates

|                               |     |     |     |
|-------------------------------|-----|-----|-----|
| GDP (US\$ millions) .....     | n/a | n/a | n/a |
| Employment (1,000 jobs) ..... | n/a | n/a | n/a |

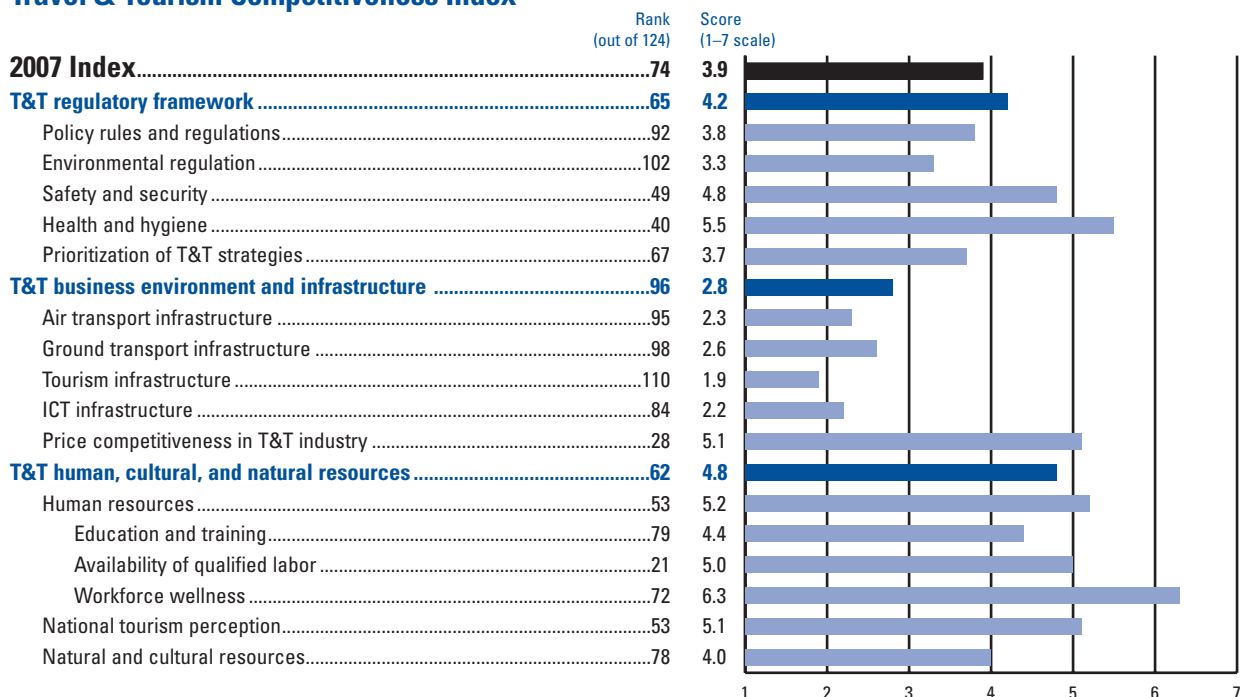
Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2005 .....         | 319 |
| International tourism receipts (US\$ millions), 2005 ..... | 141 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index



Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               |                                               | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                           | Rank/124 |
|------------------------------------------------------|-----------------------------------------------|----------|------------------------------------------------------|-----------------------------------------------------------|----------|
| <b>Safety and security</b>                           |                                               |          | <b>Policy rules and regulations</b>                  |                                                           |          |
| 3.03                                                 | Business costs of crime and violence.....     | 37       | 1.04                                                 | Visa requirements .....                                   | 100      |
| 3.01                                                 | Business costs of terrorism .....             | 39       | 1.05                                                 | Openness of bilateral Air Service Agreements .....        | 84       |
| <b>Health and hygiene</b>                            |                                               |          | 1.01                                                 | Foreign ownership restrictions.....                       | 75       |
| 4.02                                                 | Physician density.....                        | 12       | 1.02                                                 | Property rights.....                                      | 71       |
| <b>Air transport infrastructure</b>                  |                                               |          | 1.03                                                 | Rules governing foreign direct investment .....           | 56       |
| 6.05                                                 | Number of operating airlines .....            | 47       | <b>Environmental regulation</b>                      |                                                           |          |
| <b>Price competitiveness in the T&amp;T industry</b> |                                               |          | 2.02                                                 | Clarity and stability of environmental regulations .....  | 113      |
| 10.02                                                | Purchasing power parity.....                  | 33       | 2.01                                                 | Stringency of environmental regulation .....              | 95       |
| 10.01                                                | Ticket taxes and airport charges.....         | 35       | 2.03                                                 | Government prioritization of sustainable T&T.....         | 90       |
| 10.04                                                | Fuel price level .....                        | 40       | <b>Safety and security</b>                           |                                                           |          |
| <b>Human resources</b>                               |                                               |          | 3.02                                                 | Reliability of police services .....                      | 74       |
| 11.01                                                | Primary education enrollment .....            | 1        | <b>Health and hygiene</b>                            |                                                           |          |
| 11.07                                                | Ease of hiring foreign labor .....            | 5        | 4.01                                                 | Gov't efforts to reduce health risks from pandemics ..... | 90       |
| 11.08                                                | HIV prevalence .....                          | 25       | 4.03                                                 | Access to improved sanitation .....                       | 53       |
| 11.02                                                | Secondary education enrollment.....           | 48       | 4.04                                                 | Access to improved drinking water .....                   | 53       |
| <b>National tourism perception</b>                   |                                               |          | <b>Prioritization of Travel &amp; Tourism</b>        |                                                           |          |
| 12.03                                                | Recommendation to extend business trips ..... | 9        | 5.03                                                 | Effectiveness of marketing and branding .....             | 92       |
| 12.02                                                | Attitude toward tourists .....                | 25       | 5.04                                                 | T&T fair attendance .....                                 | 70       |
| 12.01                                                | Tourism openness .....                        | 47       | 5.01                                                 | Government prioritization of the T&T industry.....        | 52       |
|                                                      |                                               |          | <b>Air transport infrastructure</b>                  |                                                           |          |
|                                                      |                                               |          | 6.06                                                 | International air transport network.....                  | 107      |
|                                                      |                                               |          | 6.02                                                 | Available seat kilometers.....                            | 86       |
|                                                      |                                               |          | 6.01                                                 | Quality of air transport infrastructure .....             | 85       |
|                                                      |                                               |          | 6.03                                                 | Departures per 1,000 population.....                      | 76       |
|                                                      |                                               |          | 6.04                                                 | Airport density .....                                     | 72       |
|                                                      |                                               |          | <b>Ground transport infrastructure</b>               |                                                           |          |
|                                                      |                                               |          | 7.03                                                 | Port infrastructure .....                                 | 124      |
|                                                      |                                               |          | 7.04                                                 | Domestic transport network .....                          | 86       |
|                                                      |                                               |          | 7.02                                                 | Railroad infrastructure .....                             | 76       |
|                                                      |                                               |          | 7.01                                                 | Road infrastructure.....                                  | 68       |
|                                                      |                                               |          | <b>Tourism infrastructure</b>                        |                                                           |          |
|                                                      |                                               |          | 8.02                                                 | Presence of major car rental companies.....               | 102      |
|                                                      |                                               |          | 8.03                                                 | ATMs accepting Visa cards .....                           | 88       |
|                                                      |                                               |          | 8.01                                                 | Hotel rooms.....                                          | 66       |
|                                                      |                                               |          | <b>ICT infrastructure</b>                            |                                                           |          |
|                                                      |                                               |          | 9.01                                                 | Extent of business Internet use.....                      | 91       |
|                                                      |                                               |          | 9.02                                                 | Internet users .....                                      | 88       |
|                                                      |                                               |          | 9.03                                                 | Telephone lines.....                                      | 67       |
|                                                      |                                               |          | <b>Price competitiveness in the T&amp;T industry</b> |                                                           |          |
|                                                      |                                               |          | 10.03                                                | Extent and effect of taxation.....                        | 67       |
|                                                      |                                               |          | <b>Human resources</b>                               |                                                           |          |
|                                                      |                                               |          | 11.04                                                | Local availability of research and training services..... | 104      |
|                                                      |                                               |          | 11.05                                                | Extent of staff training.....                             | 103      |
|                                                      |                                               |          | 11.03                                                | Quality of the educational system .....                   | 88       |
|                                                      |                                               |          | 11.11                                                | Life expectancy .....                                     | 79       |
|                                                      |                                               |          | 11.10                                                | Tuberculosis incidence .....                              | 72       |
|                                                      |                                               |          | 11.06                                                | Hiring and firing practices.....                          | 53       |
|                                                      |                                               |          | <b>Natural and cultural resources</b>                |                                                           |          |
|                                                      |                                               |          | 13.04                                                | Business concern for ecosystems .....                     | 117      |
|                                                      |                                               |          | 13.02                                                | Carbon dioxide damage.....                                | 94       |
|                                                      |                                               |          | 13.01                                                | Number of World Heritage sites .....                      | 60       |
|                                                      |                                               |          | 13.03                                                | Nationally protected areas.....                           | 57       |

# Australia

## Key indicators

|                                                           |         |
|-----------------------------------------------------------|---------|
| Population (millions), 2005 .....                         | 20.3    |
| Surface area (1,000 square kilometers) .....              | 7,741.2 |
| Gross domestic product (US\$ billions), 2005 .....        | 708.5   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 30,897  |
| Real GDP growth (percent), 2005 .....                     | 2.5     |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

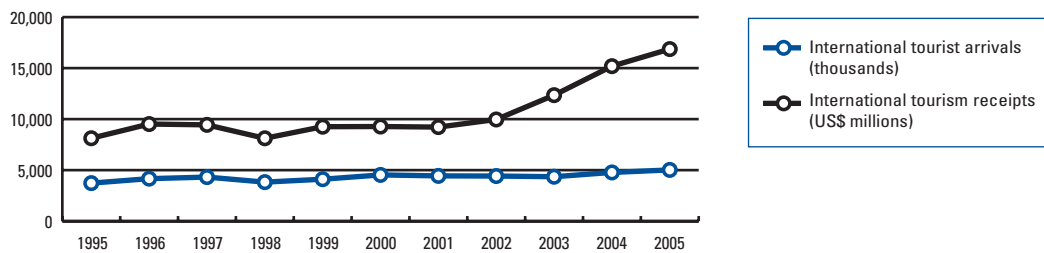
|                               |        | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|--------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 39,972 | 5.3                 | 3.2                                         |
| Employment (1,000 jobs) ..... | 569    | 5.6                 | 0.5                                         |

### T&T economy, 2006 estimates

|                               |        |      |     |
|-------------------------------|--------|------|-----|
| GDP (US\$ millions) .....     | 91,480 | 12.2 | 3.1 |
| Employment (1,000 jobs) ..... | 1,287  | 12.8 | 0.5 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |        |
|------------------------------------------------------------|--------|
| International tourist arrivals (1,000), 2005 .....         | 5,020  |
| International tourism receipts (US\$ millions), 2005 ..... | 16,866 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>13</b>            | <b>5.2</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>16</b>            | <b>5.3</b>           |
| Policy rules and regulations .....                           | 52                   | 4.8                  |
| Environmental regulation .....                               | 13                   | 5.6                  |
| Safety and security .....                                    | 20                   | 5.5                  |
| Health and hygiene .....                                     | 22                   | 5.9                  |
| Prioritization of T&T strategies .....                       | 30                   | 4.6                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>10</b>            | <b>5.0</b>           |
| Air transport infrastructure .....                           | 5                    | 5.4                  |
| Ground transport infrastructure .....                        | 20                   | 5.2                  |
| Tourism infrastructure .....                                 | 14                   | 5.4                  |
| ICT infrastructure .....                                     | 8                    | 5.6                  |
| Price competitiveness in T&T industry .....                  | 111                  | 3.6                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>26</b>            | <b>5.3</b>           |
| Human resources .....                                        | 17                   | 5.6                  |
| Education and training .....                                 | 18                   | 5.9                  |
| Availability of qualified labor .....                        | 82                   | 4.1                  |
| Workforce wellness .....                                     | 2                    | 7.0                  |
| National tourism perception .....                            | 80                   | 4.6                  |
| Natural and cultural resources .....                         | 15                   | 5.6                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                           | Rank/124 | COMPETITIVE DISADVANTAGES                                       | Rank/124 |
|--------------------------------------------------|----------|-----------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>              |          | <b>Policy rules and regulations</b>                             |          |
| 1.02 Property rights.....                        | 10       | 1.04 Visa requirements .....                                    | 92       |
| <b>Safety and security</b>                       |          | 1.05 Openness of bilateral Air Service Agreements .....         | 72       |
| 3.02 Reliability of police services .....        | 12       | 1.03 Rules governing foreign direct investment .....            | 51       |
| <b>Health and hygiene</b>                        |          | 1.01 Foreign ownership restrictions.....                        | 22       |
| 4.03 Access to improved sanitation .....         | 1        | <b>Environmental regulation</b>                                 |          |
| 4.04 Access to improved drinking water .....     | 1        | 2.01 Stringency of environmental regulation .....               | 16       |
| <b>Air transport infrastructure</b>              |          | 2.02 Clarity and stability of environmental regulations .....   | 14       |
| 6.02 Available seat kilometers.....              | 7        | 2.03 Government prioritization of sustainable T&T .....         | 13       |
| <b>Tourism infrastructure</b>                    |          | <b>Safety and security</b>                                      |          |
| 8.02 Presence of major car rental companies..... | 1        | 3.01 Business costs of terrorism .....                          | 78       |
| 8.03 ATMs accepting Visa cards .....             | 8        | 3.03 Business costs of crime and violence.....                  | 19       |
| <b>ICT infrastructure</b>                        |          | <b>Health and hygiene</b>                                       |          |
| 9.02 Internet users .....                        | 5        | 4.02 Physician density .....                                    | 39       |
| 9.03 Telephone lines.....                        | 10       | 4.01 Gov't efforts to reduce health risks from pandemics .....  | 22       |
| <b>Human resources</b>                           |          | <b>Prioritization of Travel &amp; Tourism</b>                   |          |
| 11.01 Primary education enrollment .....         | 1        | 5.02 T&T government expenditure .....                           | 44       |
| 11.02 Secondary education enrollment.....        | 1        | 5.01 Government prioritization of the T&T industry.....         | 28       |
| 11.09 Malaria incidence.....                     | 1        | 5.04 T&T fair attendance .....                                  | 23       |
| 11.11 Life expectancy .....                      | 3        | 5.03 Effectiveness of marketing and branding .....              | 13       |
| 11.10 Tuberculosis incidence .....               | 11       | <b>Air transport infrastructure</b>                             |          |
| 11.03 Quality of the educational system .....    | 12       | 6.04 Airport density .....                                      | 23       |
| <b>Natural and cultural resources</b>            |          | 6.05 Number of operating airlines.....                          | 21       |
| 13.01 Number of World Heritage sites .....       | 12       | 6.06 International air transport network .....                  | 18       |
|                                                  |          | 6.03 Departures per 1,000 population.....                       | 16       |
|                                                  |          | 6.01 Quality of air transport infrastructure .....              | 15       |
|                                                  |          | <b>Ground transport infrastructure</b>                          |          |
|                                                  |          | 7.03 Port infrastructure .....                                  | 28       |
|                                                  |          | 7.01 Road infrastructure.....                                   | 24       |
|                                                  |          | 7.02 Railroad infrastructure .....                              | 22       |
|                                                  |          | 7.04 Domestic transport network .....                           | 21       |
|                                                  |          | <b>Tourism infrastructure</b>                                   |          |
|                                                  |          | 8.01 Hotel rooms.....                                           | 24       |
|                                                  |          | <b>ICT infrastructure</b>                                       |          |
|                                                  |          | 9.01 Extent of business Internet use .....                      | 16       |
|                                                  |          | <b>Price competitiveness in the T&amp;T industry</b>            |          |
|                                                  |          | 10.02 Purchasing power parity .....                             | 108      |
|                                                  |          | 10.01 Ticket taxes and airport charges.....                     | 101      |
|                                                  |          | 10.03 Extent and effect of taxation.....                        | 80       |
|                                                  |          | 10.04 Fuel price level .....                                    | 75       |
|                                                  |          | <b>Human resources</b>                                          |          |
|                                                  |          | 11.07 Ease of hiring foreign labor .....                        | 82       |
|                                                  |          | 11.06 Hiring and firing practices.....                          | 71       |
|                                                  |          | 11.08 HIV prevalence .....                                      | 25       |
|                                                  |          | 11.05 Extent of staff training.....                             | 20       |
|                                                  |          | 11.04 Local availability of research and training services..... | 16       |
|                                                  |          | <b>National tourism perception</b>                              |          |
|                                                  |          | 12.03 Recommendation to extend business trips .....             | 80       |
|                                                  |          | 12.01 Tourism openness .....                                    | 70       |
|                                                  |          | 12.02 Attitude toward tourists .....                            | 20       |
|                                                  |          | <b>Natural and cultural resources</b>                           |          |
|                                                  |          | 13.02 Carbon dioxide damage.....                                | 62       |
|                                                  |          | 13.03 Nationally protected areas.....                           | 31       |
|                                                  |          | 13.04 Business concern for ecosystems .....                     | 13       |

# Austria

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 8.2    |
| Surface area (1,000 square kilometers) .....              | 83.9   |
| Gross domestic product (US\$ billions), 2005 .....        | 305.3  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 33,432 |
| Real GDP growth (percent), 2005 .....                     | 2.0    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

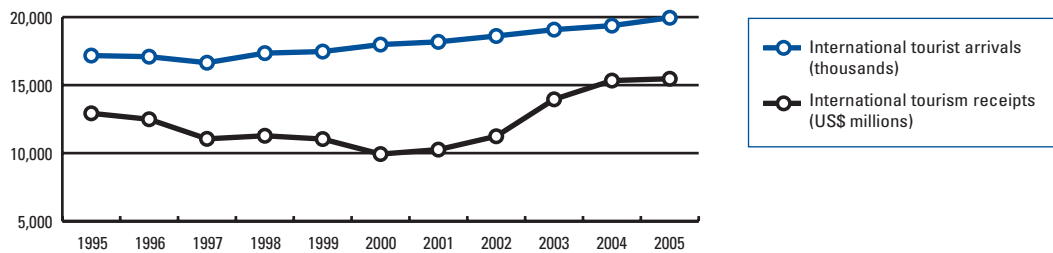
|                               |        | Percent<br>of total | 2007–2016<br>annual growth<br>(%, forecast) |
|-------------------------------|--------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 19,774 | 6.2                 | 1.8                                         |
| Employment (1,000 jobs) ..... | 301    | 7.3                 | 1.2                                         |

### T&T economy, 2006 estimates

|                               |        |      |     |
|-------------------------------|--------|------|-----|
| GDP (US\$ millions) .....     | 52,768 | 16.6 | 1.9 |
| Employment (1,000 jobs) ..... | 786    | 19.1 | 1.3 |

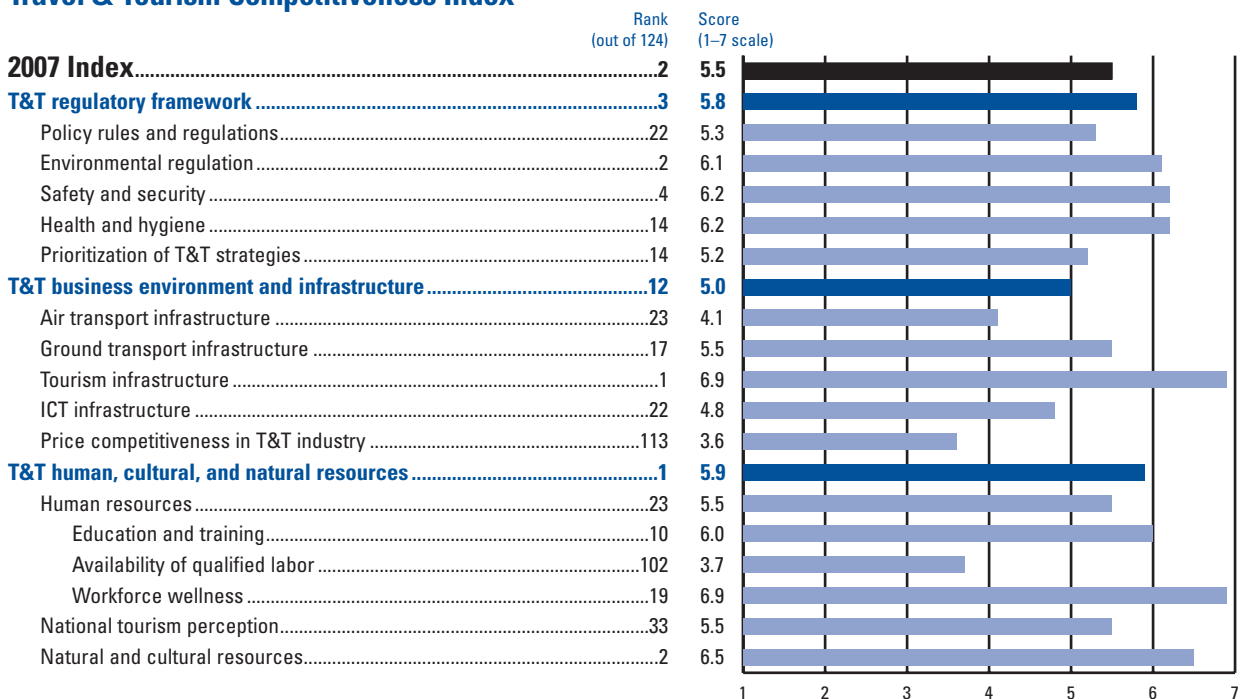
Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |        |
|------------------------------------------------------------|--------|
| International tourist arrivals (1,000), 2005 .....         | 19,952 |
| International tourism receipts (US\$ millions), 2005 ..... | 15,467 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index



Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                         | Rank/124 | COMPETITIVE DISADVANTAGES                                         | Rank/124 |
|----------------------------------------------------------------|----------|-------------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                            |          | <b>Policy rules and regulations</b>                               |          |
| 1.02 Property rights.....7                                     |          | 1.05 Openness of bilateral Air Service Agreements .....53         |          |
|                                                                |          | 1.04 Visa requirements .....43                                    |          |
| <b>Environmental regulation</b>                                |          | 1.03 Rules governing foreign direct investment .....21            |          |
| 2.01 Stringency of environmental regulation .....3             |          | 1.01 Foreign ownership restrictions.....19                        |          |
| 2.03 Government prioritization of sustainable T&T .....4       |          |                                                                   |          |
| 2.02 Clarity and stability of environmental regulations .....8 |          | <b>Health and hygiene</b>                                         |          |
|                                                                |          | 4.01 Gov't efforts to reduce health risks from pandemics .....28  |          |
| <b>Safety and security</b>                                     |          | 4.02 Physician density .....18                                    |          |
| 3.03 Business costs of crime and violence.....6                |          |                                                                   |          |
| 3.02 Reliability of police services .....8                     |          | <b>Prioritization of Travel &amp; Tourism</b>                     |          |
| 3.01 Business costs of terrorism .....10                       |          | 5.02 T&T government expenditure .....33                           |          |
|                                                                |          | 5.01 Government prioritization of the T&T industry.....23         |          |
| <b>Health and hygiene</b>                                      |          |                                                                   |          |
| 4.03 Access to improved sanitation .....1                      |          | <b>Air transport infrastructure</b>                               |          |
| 4.04 Access to improved drinking water .....1                  |          | 6.04 Airport density .....61                                      |          |
|                                                                |          | 6.02 Available seat kilometers.....32                             |          |
| <b>Prioritization of Travel &amp; Tourism</b>                  |          | 6.01 Quality of air transport infrastructure .....27              |          |
| 5.04 T&T fair attendance .....4                                |          | 6.03 Departures per 1,000 population.....21                       |          |
| 5.03 Effectiveness of marketing and branding .....7            |          | 6.06 International air transport network .....21                  |          |
|                                                                |          | 6.05 Number of operating airlines .....17                         |          |
| <b>Ground transport infrastructure</b>                         |          |                                                                   |          |
| 7.01 Road infrastructure .....9                                |          | <b>Ground transport infrastructure</b>                            |          |
| 7.04 Domestic transport network .....10                        |          | 7.03 Port infrastructure .....38                                  |          |
|                                                                |          | 7.02 Railroad infrastructure .....16                              |          |
| <b>Tourism infrastructure</b>                                  |          |                                                                   |          |
| 8.02 Presence of major car rental companies.....1              |          | <b>ICT infrastructure</b>                                         |          |
| 8.01 Hotel rooms.....3                                         |          | 9.02 Internet users .....23                                       |          |
| 8.03 ATMs accepting Visa cards .....3                          |          | 9.03 Telephone lines.....23                                       |          |
|                                                                |          | 9.01 Extent of business Internet use .....17                      |          |
| <b>Human resources</b>                                         |          |                                                                   |          |
| 11.01 Primary education enrollment .....1                      |          | <b>Price competitiveness in the T&amp;T industry</b>              |          |
| 11.02 Secondary education enrollment.....1                     |          | 10.04 Fuel price level .....109                                   |          |
| 11.09 Malaria incidence.....1                                  |          | 10.02 Purchasing power parity .....107                            |          |
| 11.05 Extent of staff training.....5                           |          | 10.01 Ticket taxes and airport charges.....92                     |          |
|                                                                |          | 10.03 Extent and effect of taxation .....34                       |          |
| <b>Natural and cultural resources</b>                          |          |                                                                   |          |
| 13.05 Risk of malaria and yellow fever .....1                  |          | <b>Human resources</b>                                            |          |
| 13.03 Nationally protected areas.....4                         |          | 11.07 Ease of hiring foreign labor .....112                       |          |
| 13.04 Business concern for ecosystems .....5                   |          | 11.06 Hiring and firing practices.....84                          |          |
| 13.02 Carbon dioxide damage.....10                             |          | 11.08 HIV prevalence .....62                                      |          |
|                                                                |          | 11.10 Tuberculosis incidence .....23                              |          |
|                                                                |          | 11.11 Life expectancy .....15                                     |          |
|                                                                |          | 11.04 Local availability of research and training services.....14 |          |
|                                                                |          | 11.03 Quality of the educational system .....13                   |          |
|                                                                |          |                                                                   |          |
|                                                                |          | <b>National tourism perception</b>                                |          |
|                                                                |          | 12.01 Tourism openness .....25                                    |          |
|                                                                |          | 12.03 Recommendation to extend business trips .....14             |          |
|                                                                |          | 12.02 Attitude toward tourists .....11                            |          |
|                                                                |          |                                                                   |          |
|                                                                |          | <b>Natural and cultural resources</b>                             |          |
|                                                                |          | 13.01 Number of World Heritage sites .....24                      |          |

# Azerbaijan

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 8.4   |
| Surface area (1,000 square kilometers) .....              | 86.6  |
| Gross domestic product (US\$ billions), 2005 .....        | 12.6  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 4,601 |
| Real GDP growth (percent), 2005 .....                     | 24.3  |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

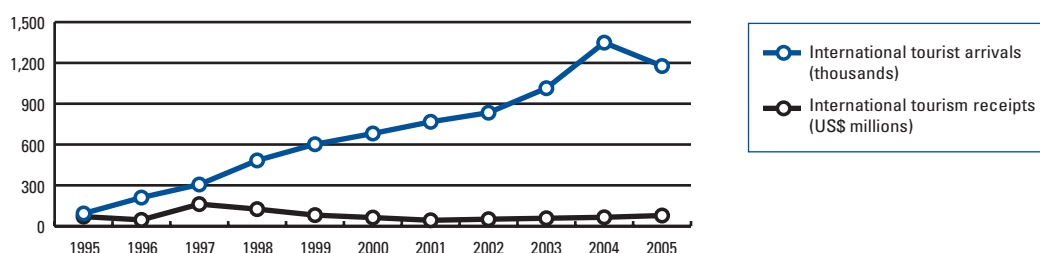
|                               |     | Percent of total | 2007–2016 annual growth (% forecast) |
|-------------------------------|-----|------------------|--------------------------------------|
| GDP (US\$ millions) .....     | n/a | n/a              | n/a                                  |
| Employment (1,000 jobs) ..... | n/a | n/a              | n/a                                  |

### T&T economy, 2006 estimates

|                               |     |     |     |
|-------------------------------|-----|-----|-----|
| GDP (US\$ millions) .....     | n/a | n/a | n/a |
| Employment (1,000 jobs) ..... | n/a | n/a | n/a |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 1,177 |
| International tourism receipts (US\$ millions), 2005 ..... | 78    |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank (out of 124) | Score (1–7 scale) |
|--------------------------------------------------------------|-------------------|-------------------|
| <b>2007 Index .....</b>                                      | <b>75</b>         | <b>3.9</b>        |
| <b>T&amp;T regulatory framework .....</b>                    | <b>77</b>         | <b>4.0</b>        |
| Policy rules and regulations .....                           | 96                | 3.8               |
| Environmental regulation .....                               | 104               | 3.2               |
| Safety and security .....                                    | 38                | 5.0               |
| Health and hygiene .....                                     | 63                | 4.7               |
| Prioritization of T&T strategies .....                       | 84                | 3.4               |
| <b>T&amp;T business environment and infrastructure .....</b> | <b>70</b>         | <b>3.3</b>        |
| Air transport infrastructure .....                           | 77                | 2.8               |
| Ground transport infrastructure .....                        | 49                | 3.9               |
| Tourism infrastructure .....                                 | 101               | 2.1               |
| ICT infrastructure .....                                     | 73                | 2.4               |
| Price competitiveness in T&T industry .....                  | 17                | 5.3               |
| <b>T&amp;T human, cultural, and natural resources .....</b>  | <b>88</b>         | <b>4.4</b>        |
| Human resources .....                                        | 36                | 5.4               |
| Education and training .....                                 | 78                | 4.5               |
| Availability of qualified labor .....                        | 9                 | 5.4               |
| Workforce wellness .....                                     | 75                | 6.2               |
| National tourism perception .....                            | 65                | 4.8               |
| Natural and cultural resources .....                         | 116               | 3.2               |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."



## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                  | Rank/124 | COMPETITIVE DISADVANTAGES                                       | Rank/124 |
|---------------------------------------------------------|----------|-----------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                     |          | <b>Policy rules and regulations</b>                             |          |
| 1.05 Openness of bilateral Air Service Agreements ..... | 48       | 1.04 Visa requirements .....                                    | 100      |
| 1.01 Foreign ownership restrictions.....                | 50       | 1.02 Property rights.....                                       | 98       |
|                                                         |          | 1.03 Rules governing foreign direct investment .....            | 84       |
| <b>Safety and security</b>                              |          | <b>Environmental regulation</b>                                 |          |
| 3.03 Business costs of crime and violence.....          | 26       | 2.01 Stringency of environmental regulation .....               | 111      |
| 3.02 Reliability of police services .....               | 50       | 2.02 Clarity and stability of environmental regulations .....   | 103      |
|                                                         |          | 2.03 Government prioritization of sustainable T&T .....         | 99       |
| <b>Health and hygiene</b>                               |          | <b>Safety and security</b>                                      |          |
| 4.02 Physician density.....                             | 14       | 3.01 Business costs of terrorism .....                          | 76       |
| <b>Air transport infrastructure</b>                     |          | <b>Health and hygiene</b>                                       |          |
| 6.01 Quality of air transport infrastructure .....      | 43       | 4.01 Gov't efforts to reduce health risks from pandemics .....  | 89       |
| 6.05 Number of operating airlines.....                  | 47       | 4.04 Access to improved drinking water .....                    | 89       |
|                                                         |          | 4.03 Access to improved sanitation .....                        | 80       |
| <b>Ground transport infrastructure</b>                  |          | <b>Prioritization of Travel &amp; Tourism</b>                   |          |
| 7.02 Railroad infrastructure .....                      | 34       | 5.03 Effectiveness of marketing and branding .....              | 91       |
| 7.04 Domestic transport network .....                   | 45       | 5.01 Government prioritization of the T&T industry.....         | 85       |
|                                                         |          | 5.04 T&T fair attendance .....                                  | 70       |
| <b>Price competitiveness in the T&amp;T industry</b>    |          | <b>Air transport infrastructure</b>                             |          |
| 10.04 Fuel price level .....                            | 5        | 6.02 Available seat kilometers.....                             | 78       |
| 10.02 Purchasing power parity.....                      | 29       | 6.03 Departures per 1,000 population.....                       | 74       |
| 10.03 Extent and effect of taxation.....                | 41       | 6.06 International air transport network .....                  | 73       |
|                                                         |          | 6.04 Airport density .....                                      | 66       |
| <b>Human resources</b>                                  |          | <b>Ground transport infrastructure</b>                          |          |
| 11.08 HIV prevalence .....                              | 1        | 7.01 Road infrastructure.....                                   | 63       |
| 11.06 Hiring and firing practices.....                  | 5        | 7.03 Port infrastructure .....                                  | 58       |
| 11.07 Ease of hiring foreign labor .....                | 36       |                                                                 |          |
| <b>National tourism perception</b>                      |          | <b>Tourism infrastructure</b>                                   |          |
| 12.03 Recommendation to extend business trips .....     | 4        | 8.02 Presence of major car rental companies.....                | 92       |
| 12.02 Attitude toward tourists .....                    | 33       | 8.01 Hotel rooms.....                                           | 82       |
|                                                         |          | 8.03 ATMs accepting Visa cards .....                            | 65       |
|                                                         |          | <b>ICT infrastructure</b>                                       |          |
|                                                         |          | 9.02 Internet users .....                                       | 85       |
|                                                         |          | 9.03 Telephone lines.....                                       | 74       |
|                                                         |          | 9.01 Extent of business Internet use .....                      | 57       |
|                                                         |          | <b>Price competitiveness in the T&amp;T industry</b>            |          |
|                                                         |          | 10.01 Ticket taxes and airport charges.....                     | 86       |
|                                                         |          | <b>Human resources</b>                                          |          |
|                                                         |          | 11.01 Primary education enrollment .....                        | 100      |
|                                                         |          | 11.05 Extent of staff training.....                             | 94       |
|                                                         |          | 11.11 Life expectancy .....                                     | 89       |
|                                                         |          | 11.03 Quality of the educational system .....                   | 86       |
|                                                         |          | 11.04 Local availability of research and training services..... | 68       |
|                                                         |          | 11.10 Tuberculosis incidence .....                              | 68       |
|                                                         |          | 11.02 Secondary education enrollment.....                       | 67       |
|                                                         |          | <b>National tourism perception</b>                              |          |
|                                                         |          | 12.01 Tourism openness .....                                    | 94       |
|                                                         |          | <b>Natural and cultural resources</b>                           |          |
|                                                         |          | 13.02 Carbon dioxide damage.....                                | 118      |
|                                                         |          | 13.04 Business concern for ecosystems .....                     | 94       |
|                                                         |          | 13.01 Number of World Heritage sites .....                      | 87       |
|                                                         |          | 13.03 Nationally protected areas.....                           | 68       |

# Bahrain

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 0.7    |
| Surface area (1,000 square kilometers) .....              | 0.7    |
| Gross domestic product (US\$ billions), 2005 .....        | 13.5   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 21,565 |
| Real GDP growth (percent), 2005 .....                     | 6.9    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

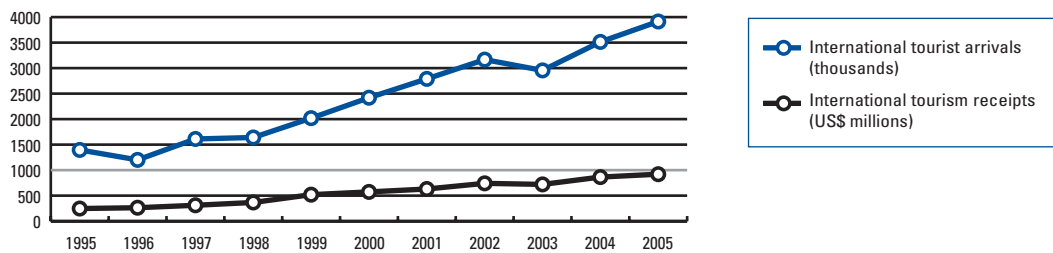
|                               |       | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 1,137 | 8.3                 | 5.8                                         |
| Employment (1,000 jobs) ..... | 38    | 11.0                | 3.8                                         |

### T&T economy, 2006 estimates

|                               |       |      |     |
|-------------------------------|-------|------|-----|
| GDP (US\$ millions) .....     | 2,851 | 20.9 | 4.9 |
| Employment (1,000 jobs) ..... | 84    | 24.4 | 3.2 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 3,914 |
| International tourism receipts (US\$ millions), 2005 ..... | 920   |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>47</b>            | <b>4.4</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>61</b>            | <b>4.2</b>           |
| Policy rules and regulations .....                           | 62                   | 4.7                  |
| Environmental regulation .....                               | 77                   | 3.7                  |
| Safety and security .....                                    | 61                   | 4.5                  |
| Health and hygiene .....                                     | 61                   | 4.8                  |
| Prioritization of T&T strategies .....                       | 81                   | 3.5                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>34</b>            | <b>4.2</b>           |
| Air transport infrastructure .....                           | 27                   | 4.0                  |
| Ground transport infrastructure .....                        | 39                   | 4.2                  |
| Tourism infrastructure .....                                 | 31                   | 4.2                  |
| ICT infrastructure .....                                     | 52                   | 3.0                  |
| Price competitiveness in T&T industry .....                  | 3                    | 5.8                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>54</b>            | <b>4.9</b>           |
| Human resources .....                                        | 79                   | 4.9                  |
| Education and training .....                                 | 60                   | 4.8                  |
| Availability of qualified labor .....                        | 115                  | 3.5                  |
| Workforce wellness .....                                     | 44                   | 6.6                  |
| National tourism perception .....                            | 36                   | 5.4                  |
| Natural and cultural resources .....                         | 66                   | 4.3                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                         | Rank/124 | COMPETITIVE DISADVANTAGES                                       | Rank/124 |
|----------------------------------------------------------------|----------|-----------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                            |          | <b>Policy rules and regulations</b>                             |          |
| 1.03 Rules governing foreign direct investment .....           | 32       | 1.04 Visa requirements .....                                    | 85       |
| <b>Health and hygiene</b>                                      |          | 1.01 Foreign ownership restrictions.....                        | 68       |
| 4.03 Access to improved sanitation .....                       | 1        | 1.05 Openness of bilateral Air Service Agreements .....         | 56       |
| 4.01 Gov't efforts to reduce health risks from pandemics ..... | 40       | 1.02 Property rights.....                                       | 47       |
| <b>Prioritization of Travel &amp; Tourism</b>                  |          | <b>Environmental regulation</b>                                 |          |
| 5.02 T&T government expenditure .....                          | 44       | 2.03 Government prioritization of sustainable T&T .....         | 86       |
| <b>Air transport infrastructure</b>                            |          | 2.02 Clarity and stability of environmental regulations .....   | 71       |
| 6.03 Departures per 1,000 population.....                      | 9        | 2.01 Stringency of environmental regulation .....               | 69       |
| 6.06 International air transport network.....                  | 28       | <b>Safety and security</b>                                      |          |
| 6.01 Quality of air transport infrastructure .....             | 37       | 3.01 Business costs of terrorism .....                          | 99       |
| <b>Ground transport infrastructure</b>                         |          | 3.02 Reliability of police services .....                       | 54       |
| 7.03 Port infrastructure .....                                 | 26       | 3.03 Business costs of crime and violence.....                  | 47       |
| 7.01 Road infrastructure.....                                  | 29       | <b>Health and hygiene</b>                                       |          |
| 7.04 Domestic transport network .....                          | 38       | 4.02 Physician density .....                                    | 77       |
| <b>Tourism infrastructure</b>                                  |          | <b>Prioritization of Travel &amp; Tourism</b>                   |          |
| 8.01 Hotel rooms.....                                          | 18       | 5.03 Effectiveness of marketing and branding .....              | 107      |
| 8.02 Presence of major car rental companies.....               | 35       | 5.04 T&T fair attendance .....                                  | 70       |
| <b>ICT infrastructure</b>                                      |          | 5.01 Government prioritization of the T&T industry .....        | 60       |
| 9.03 Telephone lines.....                                      | 46       | <b>Air transport infrastructure</b>                             |          |
| <b>Price competitiveness in the T&amp;T industry</b>           |          | 6.04 Airport density .....                                      | 70       |
| 10.03 Extent and effect of taxation.....                       | 1        | 6.05 Number of operating airlines .....                         | 59       |
| 10.01 Ticket taxes and airport charges.....                    | 5        | 6.02 Available seat kilometers.....                             | 55       |
| 10.04 Fuel price level .....                                   | 7        | <b>Ground transport infrastructure</b>                          |          |
| <b>Human resources</b>                                         |          | 7.02 Railroad infrastructure .....                              | 92       |
| 11.01 Primary education enrollment .....                       | 1        | <b>Tourism infrastructure</b>                                   |          |
| 11.09 Malaria incidence.....                                   | 1        | 8.03 ATMs accepting Visa cards .....                            | 53       |
| 11.02 Secondary education enrollment.....                      | 26       | <b>ICT infrastructure</b>                                       |          |
| 11.11 Life expectancy .....                                    | 45       | 9.01 Extent of business Internet use .....                      | 82       |
| <b>National tourism perception</b>                             |          | 9.02 Internet users .....                                       | 47       |
| 12.01 Tourism openness .....                                   | 11       | <b>Price competitiveness in the T&amp;T industry</b>            |          |
| <b>Natural and cultural resources</b>                          |          | 10.02 Purchasing power parity.....                              | 91       |
| 13.05 Risk of malaria and yellow fever .....                   | 1        | <b>Human resources</b>                                          |          |
|                                                                |          | 11.07 Ease of hiring foreign labor .....                        | 107      |
|                                                                |          | 11.06 Hiring and firing practices.....                          | 104      |
|                                                                |          | 11.04 Local availability of research and training services..... | 96       |
|                                                                |          | 11.03 Quality of the educational system .....                   | 79       |
|                                                                |          | 11.05 Extent of staff training.....                             | 59       |
|                                                                |          | 11.10 Tuberculosis incidence .....                              | 51       |
|                                                                |          | 11.08 HIV prevalence .....                                      | 48       |
|                                                                |          | <b>National tourism perception</b>                              |          |
|                                                                |          | 12.03 Recommendation to extend business trips .....             | 104      |
|                                                                |          | 12.02 Attitude toward tourists .....                            | 89       |
|                                                                |          | <b>Natural and cultural resources</b>                           |          |
|                                                                |          | 13.02 Carbon dioxide damage.....                                | 106      |
|                                                                |          | 13.01 Number of World Heritage sites .....                      | 87       |
|                                                                |          | 13.04 Business concern for ecosystems .....                     | 83       |

# Bangladesh

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 141.8 |
| Surface area (1,000 square kilometers) .....              | 144.0 |
| Gross domestic product (US\$ billions), 2005 .....        | 60.8  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 2,011 |
| Real GDP growth (percent), 2005 .....                     | 6.2   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

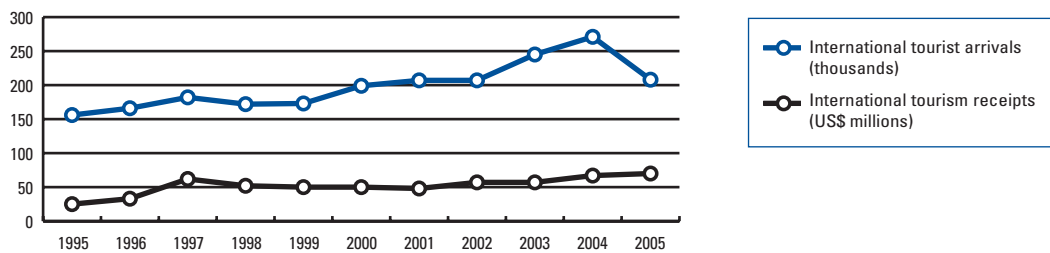
|                               | Percent of total | 2007–2016 annual growth (% forecast) |
|-------------------------------|------------------|--------------------------------------|
| GDP (US\$ millions) .....     | 1.5              | 5.7                                  |
| Employment (1,000 jobs) ..... | 1.2              | 3.2                                  |

### T&T economy, 2006 estimates

|                               |       |     |     |
|-------------------------------|-------|-----|-----|
| GDP (US\$ millions) .....     | 2,350 | 3.7 | 5.3 |
| Employment (1,000 jobs) ..... | 2,181 | 3.0 | 2.9 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2005 .....         | 208 |
| International tourism receipts (US\$ millions), 2005 ..... | 70  |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank (out of 124) | Score (1–7 scale) |
|--------------------------------------------------------------|-------------------|-------------------|
| <b>2007 Index .....</b>                                      | <b>120</b>        | <b>3.2</b>        |
| <b>T&amp;T regulatory framework .....</b>                    | <b>121</b>        | <b>3.1</b>        |
| Policy rules and regulations .....                           | 99                | 3.7               |
| Environmental regulation .....                               | 112               | 3.0               |
| Safety and security .....                                    | 119               | 3.1               |
| Health and hygiene .....                                     | 105               | 3.3               |
| Prioritization of T&T strategies .....                       | 118               | 2.4               |
| <b>T&amp;T business environment and infrastructure .....</b> | <b>108</b>        | <b>2.6</b>        |
| Air transport infrastructure .....                           | 114               | 2.0               |
| Ground transport infrastructure .....                        | 87                | 2.8               |
| Tourism infrastructure .....                                 | 120               | 1.3               |
| ICT infrastructure .....                                     | 112               | 1.7               |
| Price competitiveness in T&T industry .....                  | 19                | 5.3               |
| <b>T&amp;T human, cultural, and natural resources .....</b>  | <b>116</b>        | <b>4.0</b>        |
| Human resources .....                                        | 99                | 4.3               |
| Education and training .....                                 | 108               | 3.7               |
| Availability of qualified labor .....                        | 73                | 4.2               |
| Workforce wellness .....                                     | 99                | 5.0               |
| National tourism perception .....                            | 119               | 3.9               |
| Natural and cultural resources .....                         | 92                | 3.7               |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               |                                                 | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                           | Rank/124 |
|------------------------------------------------------|-------------------------------------------------|----------|------------------------------------------------------|-----------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                  |                                                 |          | <b>Policy rules and regulations</b>                  |                                                           |          |
| 1.03                                                 | Rules governing foreign direct investment ..... | 23       | 1.04                                                 | Visa requirements .....                                   | 106      |
| 1.01                                                 | Foreign ownership restrictions.....             | 42       | 1.05                                                 | Openness of bilateral Air Service Agreements .....        | 102      |
| <b>Price competitiveness in the T&amp;T industry</b> |                                                 |          | 1.02                                                 | Property rights.....                                      | 87       |
| 10.02                                                | Purchasing power parity .....                   | 9        | <b>Environmental regulation</b>                      |                                                           |          |
| 10.04                                                | Fuel price level .....                          | 16       | 2.02                                                 | Clarity and stability of environmental regulations .....  | 116      |
| 10.03                                                | Extent and effect of taxation.....              | 48       | 2.03                                                 | Government prioritization of sustainable T&T .....        | 110      |
| <b>Human resources</b>                               |                                                 |          | 2.01                                                 | Stringency of environmental regulation .....              | 105      |
| 11.01                                                | Primary education enrollment .....              | 1        | <b>Safety and security</b>                           |                                                           |          |
| 11.06                                                | Hiring and firing practices.....                | 25       | 3.02                                                 | Reliability of police services .....                      | 118      |
|                                                      |                                                 |          | 3.01                                                 | Business costs of terrorism .....                         | 113      |
|                                                      |                                                 |          | 3.03                                                 | Business costs of crime and violence.....                 | 98       |
|                                                      |                                                 |          | <b>Health and hygiene</b>                            |                                                           |          |
|                                                      |                                                 |          | 4.01                                                 | Gov't efforts to reduce health risks from pandemics ..... | 116      |
|                                                      |                                                 |          | 4.02                                                 | Physician density .....                                   | 102      |
|                                                      |                                                 |          | 4.04                                                 | Access to improved drinking water .....                   | 94       |
|                                                      |                                                 |          | 4.03                                                 | Access to improved sanitation .....                       | 86       |
|                                                      |                                                 |          | <b>Prioritization of Travel &amp; Tourism</b>        |                                                           |          |
|                                                      |                                                 |          | 5.03                                                 | Effectiveness of marketing and branding .....             | 117      |
|                                                      |                                                 |          | 5.01                                                 | Government prioritization of the T&T industry.....        | 112      |
|                                                      |                                                 |          | 5.04                                                 | T&T fair attendance .....                                 | 105      |
|                                                      |                                                 |          | 5.02                                                 | T&T government expenditure .....                          | 85       |
|                                                      |                                                 |          | <b>Air transport infrastructure</b>                  |                                                           |          |
|                                                      |                                                 |          | 6.04                                                 | Airport density .....                                     | 124      |
|                                                      |                                                 |          | 6.01                                                 | Quality of air transport infrastructure .....             | 120      |
|                                                      |                                                 |          | 6.03                                                 | Departures per 1,000 population.....                      | 113      |
|                                                      |                                                 |          | 6.06                                                 | International air transport network .....                 | 94       |
|                                                      |                                                 |          | 6.05                                                 | Number of operating airlines .....                        | 69       |
|                                                      |                                                 |          | 6.02                                                 | Available seat kilometers.....                            | 58       |
|                                                      |                                                 |          | <b>Ground transport infrastructure</b>               |                                                           |          |
|                                                      |                                                 |          | 7.04                                                 | Domestic transport network .....                          | 107      |
|                                                      |                                                 |          | 7.03                                                 | Port infrastructure .....                                 | 98       |
|                                                      |                                                 |          | 7.01                                                 | Road infrastructure.....                                  | 72       |
|                                                      |                                                 |          | 7.02                                                 | Railroad infrastructure .....                             | 68       |
|                                                      |                                                 |          | <b>Tourism infrastructure</b>                        |                                                           |          |
|                                                      |                                                 |          | 8.01                                                 | Hotel rooms.....                                          | 116      |
|                                                      |                                                 |          | 8.02                                                 | Presence of major car rental companies.....               | 113      |
|                                                      |                                                 |          | 8.03                                                 | ATMs accepting Visa cards .....                           | 111      |
|                                                      |                                                 |          | <b>ICT infrastructure</b>                            |                                                           |          |
|                                                      |                                                 |          | 9.02                                                 | Internet users .....                                      | 121      |
|                                                      |                                                 |          | 9.03                                                 | Telephone lines.....                                      | 115      |
|                                                      |                                                 |          | 9.01                                                 | Extent of business Internet use .....                     | 97       |
|                                                      |                                                 |          | <b>Price competitiveness in the T&amp;T industry</b> |                                                           |          |
|                                                      |                                                 |          | 10.01                                                | Ticket taxes and airport charges.....                     | 87       |
|                                                      |                                                 |          | <b>Human resources</b>                               |                                                           |          |
|                                                      |                                                 |          | 11.04                                                | Local availability of research and training services..... | 120      |
|                                                      |                                                 |          | 11.05                                                | Extent of staff training.....                             | 115      |
|                                                      |                                                 |          | 11.07                                                | Ease of hiring foreign labor .....                        | 115      |
|                                                      |                                                 |          | 11.10                                                | Tuberculosis incidence .....                              | 105      |
|                                                      |                                                 |          | 11.03                                                | Quality of the educational system .....                   | 102      |
|                                                      |                                                 |          | 11.02                                                | Secondary education enrollment.....                       | 97       |
|                                                      |                                                 |          | 11.11                                                | Life expectancy .....                                     | 96       |
|                                                      |                                                 |          | 11.09                                                | Malaria incidence.....                                    | 82       |
|                                                      |                                                 |          | 11.08                                                | HIV prevalence .....                                      | 62       |

(Disadvantages cont'd. from bottom of right column)

<<< (Cont'd. on bottom of left column)

# Barbados

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 0.3    |
| Surface area (1,000 square kilometers) .....              | 0.4    |
| Gross domestic product (US\$ billions), 2005 .....        | 3.1    |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 17,610 |
| Real GDP growth (percent), 2005 .....                     | 3.9    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

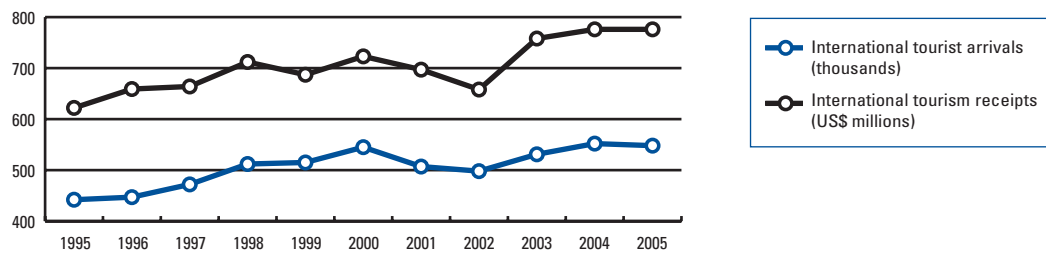
|                               |     | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-----|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 446 | 13.1                | 5.2                                         |
| Employment (1,000 jobs) ..... | 22  | 16.5                | 3.2                                         |

### T&T economy, 2006 estimates

|                               |       |      |     |
|-------------------------------|-------|------|-----|
| GDP (US\$ millions) .....     | 1,407 | 41.4 | 4.6 |
| Employment (1,000 jobs) ..... | 62    | 46.9 | 2.8 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2005 .....         | 548 |
| International tourism receipts (US\$ millions), 2005 ..... | 776 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index .....</b>                                      | <b>29</b>            | <b>4.9</b>           |
| <b>T&amp;T regulatory framework .....</b>                    | <b>31</b>            | <b>5.1</b>           |
| Policy rules and regulations .....                           | 27                   | 5.2                  |
| Environmental regulation .....                               | 42                   | 4.4                  |
| Safety and security .....                                    | 35                   | 5.1                  |
| Health and hygiene .....                                     | 42                   | 5.4                  |
| Prioritization of T&T strategies .....                       | 11                   | 5.2                  |
| <b>T&amp;T business environment and infrastructure .....</b> | <b>36</b>            | <b>4.1</b>           |
| Air transport infrastructure .....                           | 53                   | 3.2                  |
| Ground transport infrastructure .....                        | 41                   | 4.1                  |
| Tourism infrastructure .....                                 | 42                   | 3.8                  |
| ICT infrastructure .....                                     | 25                   | 4.6                  |
| Price competitiveness in T&T industry .....                  | 33                   | 4.9                  |
| <b>T&amp;T human, cultural, and natural resources .....</b>  | <b>17</b>            | <b>5.4</b>           |
| Human resources .....                                        | 42                   | 5.3                  |
| Education and training .....                                 | 30                   | 5.3                  |
| Availability of qualified labor .....                        | 79                   | 4.1                  |
| Workforce wellness .....                                     | 49                   | 6.6                  |
| National tourism perception .....                            | 2                    | 6.6                  |
| Natural and cultural resources .....                         | 68                   | 4.3                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                   | Rank/124 | COMPETITIVE DISADVANTAGES                                        | Rank/124 |
|----------------------------------------------------------|----------|------------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                      |          | <b>Policy rules and regulations</b>                              |          |
| 1.04 Visa requirements .....                             | 15       | 1.03 Rules governing foreign direct investment .....             | 41       |
| 1.05 Openness of bilateral Air Service Agreements .....  | 22       | 1.02 Property rights .....                                       | 36       |
|                                                          |          | 1.01 Foreign ownership restrictions .....                        | 34       |
| <b>Environmental regulation</b>                          |          | <b>Environmental regulation</b>                                  |          |
| 2.03 Government prioritization of sustainable T&T .....  | 9        | 2.02 Clarity and stability of environmental regulations .....    | 56       |
|                                                          |          | 2.01 Stringency of environmental regulation .....                | 55       |
| <b>Safety and security</b>                               |          | <b>Safety and security</b>                                       |          |
| 3.02 Reliability of police services .....                | 28       | 3.01 Business costs of terrorism .....                           | 69       |
|                                                          |          | 3.03 Business costs of crime and violence .....                  | 43       |
| <b>Health and hygiene</b>                                |          | <b>Health and hygiene</b>                                        |          |
| 4.04 Access to improved drinking water .....             | 1        | 4.02 Physician density .....                                     | 72       |
|                                                          |          | 4.03 Access to improved sanitation .....                         | 36       |
|                                                          |          | 4.01 Gov't efforts to reduce health risks from pandemics .....   | 31       |
| <b>Prioritization of Travel &amp; Tourism</b>            |          | <b>Prioritization of Travel &amp; Tourism</b>                    |          |
| 5.01 Government prioritization of the T&T industry ..... | 2        | 5.04 T&T fair attendance .....                                   | 105      |
| 5.02 T&T government expenditure .....                    | 4        |                                                                  |          |
| 5.03 Effectiveness of marketing and branding .....       | 5        | <b>Air transport infrastructure</b>                              |          |
|                                                          |          | 6.05 Number of operating airlines .....                          | 88       |
| <b>Air transport infrastructure</b>                      |          | 6.04 Airport density .....                                       | 85       |
| 6.01 Quality of air transport infrastructure .....       | 12       | 6.02 Available seat kilometers .....                             | 69       |
|                                                          |          | 6.06 International air transport network .....                   | 36       |
| <b>Ground transport infrastructure</b>                   |          | <b>Ground transport infrastructure</b>                           |          |
| 7.03 Port infrastructure .....                           | 22       | 7.02 Railroad infrastructure .....                               | 96       |
|                                                          |          | 7.01 Road infrastructure .....                                   | 39       |
| <b>Tourism infrastructure</b>                            |          | 7.04 Domestic transport network .....                            | 35       |
| 8.01 Hotel rooms .....                                   | 6        | <b>Tourism infrastructure</b>                                    |          |
|                                                          |          | 8.02 Presence of major car rental companies .....                | 113      |
| <b>ICT infrastructure</b>                                |          | 8.03 ATMs accepting Visa cards .....                             | 40       |
| 9.02 Internet users .....                                | 13       | <b>ICT infrastructure</b>                                        |          |
| 9.03 Telephone lines .....                               | 18       | 9.01 Extent of business Internet use .....                       | 60       |
| <b>Price competitiveness in the T&amp;T industry</b>     |          | <b>Price competitiveness in the T&amp;T industry</b>             |          |
| 10.01 Ticket taxes and airport charges .....             | 12       | 10.02 Purchasing power parity .....                              | 79       |
|                                                          |          | 10.04 Fuel price level .....                                     | 53       |
| <b>Human resources</b>                                   |          | 10.03 Extent and effect of taxation .....                        | 43       |
| 11.01 Primary education enrollment .....                 | 1        | <b>Human resources</b>                                           |          |
| 11.02 Secondary education enrollment .....               | 1        | 11.07 Ease of hiring foreign labor .....                         | 99       |
| 11.09 Malaria incidence .....                            | 1        | 11.08 HIV prevalence .....                                       | 96       |
| 11.03 Quality of the educational system .....            | 16       | 11.04 Local availability of research and training services ..... | 77       |
| 11.10 Tuberculosis incidence .....                       | 26       | 11.06 Hiring and firing practices .....                          | 60       |
|                                                          |          | 11.05 Extent of staff training .....                             | 49       |
| <b>National tourism perception</b>                       |          | 11.11 Life expectancy .....                                      | 39       |
| 12.01 Tourism openness .....                             | 1        | <b>Natural and cultural resources</b>                            |          |
| 12.03 Recommendation to extend business trips .....      | 19       | 13.01 Number of World Heritage sites .....                       | 107      |
| 12.02 Attitude toward tourists .....                     | 26       | 13.04 Business concern for ecosystems .....                      | 54       |
|                                                          |          | 13.02 Carbon dioxide damage .....                                | 37       |



# Belgium

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 10.5   |
| Surface area (1,000 square kilometers) .....              | 32.5   |
| Gross domestic product (US\$ billions), 2005 .....        | 371.7  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 31,244 |
| Real GDP growth (percent), 2005 .....                     | 1.5    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

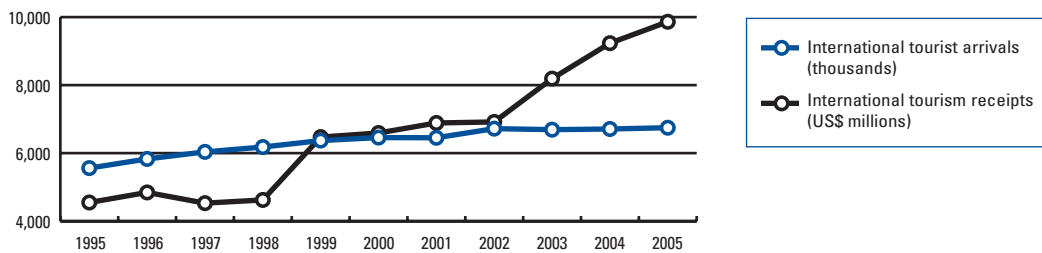
|                               |        | Percent<br>of total | 2007–2016<br>annual growth<br>(%, forecast) |
|-------------------------------|--------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 11,127 | 2.8                 | 2.0                                         |
| Employment (1,000 jobs) ..... | 142    | 3.3                 | 0.7                                         |

### T&T economy, 2006 estimates

|                               |        |      |     |
|-------------------------------|--------|------|-----|
| GDP (US\$ millions) .....     | 37,088 | 9.4  | 2.8 |
| Employment (1,000 jobs) ..... | 457    | 10.6 | 1.3 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 6,747 |
| International tourism receipts (US\$ millions), 2005 ..... | 9,863 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1–7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>21</b>            | <b>5.1</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>24</b>            | <b>5.2</b>           |
| Policy rules and regulations .....                           | 20                   | 5.3                  |
| Environmental regulation .....                               | 18                   | 5.4                  |
| Safety and security .....                                    | 36                   | 5.1                  |
| Health and hygiene .....                                     | 2                    | 6.6                  |
| Prioritization of T&T strategies .....                       | 86                   | 3.4                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>29</b>            | <b>4.4</b>           |
| Air transport infrastructure .....                           | 26                   | 4.0                  |
| Ground transport infrastructure .....                        | 9                    | 6.0                  |
| Tourism infrastructure .....                                 | 33                   | 4.2                  |
| ICT infrastructure .....                                     | 29                   | 4.4                  |
| Price competitiveness in T&T industry .....                  | 114                  | 3.5                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>4</b>             | <b>5.6</b>           |
| Human resources .....                                        | 27                   | 5.5                  |
| Education and training .....                                 | 5                    | 6.1                  |
| Availability of qualified labor .....                        | 114                  | 3.5                  |
| Workforce wellness .....                                     | 23                   | 6.8                  |
| National tourism perception .....                            | 59                   | 5.0                  |
| Natural and cultural resources .....                         | 4                    | 6.4                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                          | Rank/124 | COMPETITIVE DISADVANTAGES                                      | Rank/124 |
|-----------------------------------------------------------------|----------|----------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                             |          | <b>Policy rules and regulations</b>                            |          |
| 1.01 Foreign ownership restrictions.....                        | 13       | 1.04 Visa requirements .....                                   | 43       |
| 1.02 Property rights.....                                       | 19       | 1.05 Openness of bilateral Air Service Agreements .....        | 32       |
| 1.03 Rules governing foreign direct investment .....            | 20       |                                                                |          |
| <b>Environmental regulation</b>                                 |          | <b>Environmental regulation</b>                                |          |
| 2.01 Stringency of environmental regulation .....               | 11       | 2.03 Government prioritization of sustainable T&T .....        | 32       |
|                                                                 |          | 2.02 Clarity and stability of environmental regulations .....  | 21       |
| <b>Health and hygiene</b>                                       |          | <b>Safety and security</b>                                     |          |
| 4.02 Physician density.....                                     | 1        | 3.01 Business costs of terrorism .....                         | 85       |
| 4.03 Access to improved sanitation .....                        | 1        | 3.03 Business costs of crime and violence.....                 | 38       |
| 4.04 Access to improved drinking water .....                    | 1        | 3.02 Reliability of police services .....                      | 32       |
| <b>Air transport infrastructure</b>                             |          | <b>Health and hygiene</b>                                      |          |
| 6.03 Departures per 1,000 population.....                       | 17       | 4.01 Gov't efforts to reduce health risks from pandemics ..... | 21       |
| 6.01 Quality of air transport infrastructure .....              | 18       |                                                                |          |
| <b>Ground transport infrastructure</b>                          |          | <b>Prioritization of Travel &amp; Tourism</b>                  |          |
| 7.03 Port infrastructure .....                                  | 5        | 5.01 Government prioritization of the T&T industry.....        | 87       |
| 7.02 Railroad infrastructure .....                              | 7        | 5.04 T&T fair attendance .....                                 | 70       |
| 7.01 Road infrastructure.....                                   | 10       | 5.03 Effectiveness of marketing and branding .....             | 69       |
| 7.04 Domestic transport network .....                           | 15       | 5.02 T&T government expenditure .....                          | 59       |
| <b>Tourism infrastructure</b>                                   |          | <b>Air transport infrastructure</b>                            |          |
| 8.02 Presence of major car rental companies.....                | 1        | 6.04 Airport density .....                                     | 81       |
|                                                                 |          | 6.02 Available seat kilometers.....                            | 42       |
| <b>Human resources</b>                                          |          | 6.06 International air transport network .....                 | 31       |
| 11.01 Primary education enrollment .....                        | 1        | 6.05 Number of operating airlines.....                         | 25       |
| 11.02 Secondary education enrollment.....                       | 1        |                                                                |          |
| 11.09 Malaria incidence.....                                    | 1        | <b>Tourism infrastructure</b>                                  |          |
| 11.03 Quality of the educational system .....                   | 8        | 8.01 Hotel rooms.....                                          | 41       |
| 11.04 Local availability of research and training services..... | 9        | 8.03 ATMs accepting Visa cards .....                           | 35       |
| 11.05 Extent of staff training.....                             | 13       |                                                                |          |
| <b>Natural and cultural resources</b>                           |          | <b>ICT infrastructure</b>                                      |          |
| 13.05 Risk of malaria and yellow fever .....                    | 1        | 9.01 Extent of business Internet use .....                     | 32       |
| 13.04 Business concern for ecosystems .....                     | 16       | 9.02 Internet users .....                                      | 29       |
| 13.02 Carbon dioxide damage.....                                | 19       | 9.03 Telephone lines.....                                      | 25       |
|                                                                 |          |                                                                |          |
|                                                                 |          | <b>Price competitiveness in the T&amp;T industry</b>           |          |
|                                                                 |          | 10.03 Extent and effect of taxation.....                       | 123      |
|                                                                 |          | 10.02 Purchasing power parity .....                            | 109      |
|                                                                 |          | 10.04 Fuel price level .....                                   | 100      |
|                                                                 |          | 10.01 Ticket taxes and airport charges.....                    | 42       |
|                                                                 |          |                                                                |          |
|                                                                 |          | <b>Human resources</b>                                         |          |
|                                                                 |          | 11.06 Hiring and firing practices.....                         | 117      |
|                                                                 |          | 11.07 Ease of hiring foreign labor .....                       | 80       |
|                                                                 |          | 11.08 HIV prevalence .....                                     | 48       |
|                                                                 |          | 11.11 Life expectancy .....                                    | 24       |
|                                                                 |          | 11.10 Tuberculosis incidence .....                             | 22       |
|                                                                 |          |                                                                |          |
|                                                                 |          | <b>National tourism perception</b>                             |          |
|                                                                 |          | 12.03 Recommendation to extend business trips .....            | 88       |
|                                                                 |          | 12.02 Attitude toward tourists .....                           | 37       |
|                                                                 |          | 12.01 Tourism openness .....                                   | 32       |
|                                                                 |          |                                                                |          |
|                                                                 |          | <b>Natural and cultural resources</b>                          |          |
|                                                                 |          | 13.01 Number of World Heritage sites .....                     | 21       |

# Benin

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 8.4   |
| Surface area (1,000 square kilometers) .....              | 112.6 |
| Gross domestic product (US\$ billions), 2005 .....        | 4.4   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 1,176 |
| Real GDP growth (percent), 2005 .....                     | 2.9   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators\

### T&T industry, 2006 estimates

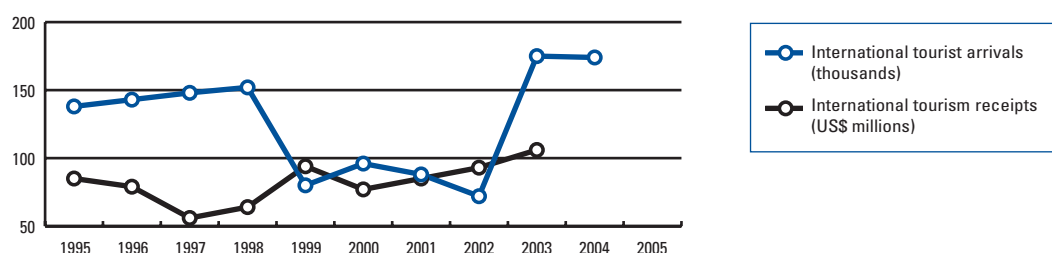
|                               |     | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-----|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 144 | 3.0                 | 5.0                                         |
| Employment (1,000 jobs) ..... | 42  | 2.4                 | 3.7                                         |

### T&T economy, 2006 estimates

|                               |     |     |     |
|-------------------------------|-----|-----|-----|
| GDP (US\$ millions) .....     | 304 | 6.3 | 5.3 |
| Employment (1,000 jobs) ..... | 90  | 5.1 | 4.0 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2004 .....         | 174 |
| International tourism receipts (US\$ millions), 2003 ..... | 106 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index .....</b>                                      | <b>116</b>           | <b>3.3</b>           |
| <b>T&amp;T regulatory framework .....</b>                    | <b>112</b>           | <b>3.4</b>           |
| Policy rules and regulations .....                           | 119                  | 3.2                  |
| Environmental regulation .....                               | 76                   | 3.8                  |
| Safety and security .....                                    | 82                   | 4.1                  |
| Health and hygiene .....                                     | 113                  | 3.1                  |
| Prioritization of T&T strategies .....                       | 110                  | 2.8                  |
| <b>T&amp;T business environment and infrastructure .....</b> | <b>116</b>           | <b>2.5</b>           |
| Air transport infrastructure .....                           | 122                  | 1.7                  |
| Ground transport infrastructure .....                        | 100                  | 2.5                  |
| Tourism infrastructure .....                                 | 97                   | 2.2                  |
| ICT infrastructure .....                                     | 113                  | 1.7                  |
| Price competitiveness in T&T industry .....                  | 79                   | 4.3                  |
| <b>T&amp;T human, cultural, and natural resources .....</b>  | <b>115</b>           | <b>4.0</b>           |
| Human resources .....                                        | 104                  | 4.1                  |
| Education and training .....                                 | 113                  | 3.5                  |
| Availability of qualified labor .....                        | 25                   | 4.8                  |
| Workforce wellness .....                                     | 103                  | 3.9                  |
| National tourism perception .....                            | 79                   | 4.6                  |
| Natural and cultural resources .....                         | 112                  | 3.2                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                |                                               | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                           | Rank/124 |
|---------------------------------------|-----------------------------------------------|----------|------------------------------------------------------|-----------------------------------------------------------|----------|
| <b>Safety and security</b>            |                                               |          | <b>Policy rules and regulations</b>                  |                                                           |          |
| 3.01                                  | Business costs of terrorism .....             | 36       | 1.05                                                 | Openness of bilateral Air Service Agreements .....        | 115      |
| <b>Human resources</b>                |                                               |          | 1.03                                                 | Rules governing foreign direct investment .....           | 106      |
| 11.07                                 | Ease of hiring foreign labor .....            | 37       | 1.04                                                 | Visa requirements .....                                   | 106      |
| 11.06                                 | Hiring and firing practices .....             | 39       | 1.02                                                 | Property rights .....                                     | 97       |
| <b>National tourism perception</b>    |                                               |          | 1.01                                                 | Foreign ownership restrictions .....                      | 71       |
| 12.03                                 | Recommendation to extend business trips ..... | 47       | <b>Environmental regulation</b>                      |                                                           |          |
| 12.02                                 | Attitude toward tourists .....                | 50       | 2.02                                                 | Clarity and stability of environmental regulations .....  | 82       |
| <b>Natural and cultural resources</b> |                                               |          | 2.03                                                 | Government prioritization of sustainable T&T .....        | 78       |
| 13.02                                 | Carbon dioxide damage .....                   | 38       | 2.01                                                 | Stringency of environmental regulation .....              | 61       |
| 13.03                                 | Nationally protected areas .....              | 40       | <b>Safety and security</b>                           |                                                           |          |
|                                       |                                               |          | 3.02                                                 | Reliability of police services .....                      | 89       |
|                                       |                                               |          | 3.03                                                 | Business costs of crime and violence .....                | 88       |
|                                       |                                               |          | <b>Health and hygiene</b>                            |                                                           |          |
|                                       |                                               |          | 4.02                                                 | Physician density .....                                   | 117      |
|                                       |                                               |          | 4.03                                                 | Access to improved sanitation .....                       | 103      |
|                                       |                                               |          | 4.04                                                 | Access to improved drinking water .....                   | 96       |
|                                       |                                               |          | 4.01                                                 | Gov't efforts to reduce health risks from pandemics ..... | 65       |
|                                       |                                               |          | <b>Prioritization of Travel &amp; Tourism</b>        |                                                           |          |
|                                       |                                               |          | 5.04                                                 | T&T fair attendance .....                                 | 117      |
|                                       |                                               |          | 5.01                                                 | Government prioritization of the T&T industry .....       | 89       |
|                                       |                                               |          | 5.03                                                 | Effectiveness of marketing and branding .....             | 81       |
|                                       |                                               |          | 5.02                                                 | T&T government expenditure .....                          | 64       |
|                                       |                                               |          | <b>Air transport infrastructure</b>                  |                                                           |          |
|                                       |                                               |          | 6.06                                                 | International air transport network .....                 | 120      |
|                                       |                                               |          | 6.01                                                 | Quality of air transport infrastructure .....             | 116      |
|                                       |                                               |          | 6.04                                                 | Airport density .....                                     | 116      |
|                                       |                                               |          | 6.02                                                 | Available seat kilometers .....                           | 110      |
|                                       |                                               |          | 6.03                                                 | Departures per 1,000 population .....                     | 108      |
|                                       |                                               |          | 6.05                                                 | Number of operating airlines .....                        | 91       |
|                                       |                                               |          | <b>Ground transport infrastructure</b>               |                                                           |          |
|                                       |                                               |          | 7.02                                                 | Railroad infrastructure .....                             | 111      |
|                                       |                                               |          | 7.04                                                 | Domestic transport network .....                          | 101      |
|                                       |                                               |          | 7.03                                                 | Port infrastructure .....                                 | 95       |
|                                       |                                               |          | 7.01                                                 | Road infrastructure .....                                 | 90       |
|                                       |                                               |          | <b>Tourism infrastructure</b>                        |                                                           |          |
|                                       |                                               |          | 8.01                                                 | Hotel rooms .....                                         | 109      |
|                                       |                                               |          | 8.03                                                 | ATMs accepting Visa cards .....                           | 108      |
|                                       |                                               |          | 8.02                                                 | Presence of major car rental companies .....              | 66       |
|                                       |                                               |          | <b>ICT infrastructure</b>                            |                                                           |          |
|                                       |                                               |          | 9.03                                                 | Telephone lines .....                                     | 107      |
|                                       |                                               |          | 9.01                                                 | Extent of business Internet use .....                     | 105      |
|                                       |                                               |          | 9.02                                                 | Internet users .....                                      | 105      |
|                                       |                                               |          | <b>Price competitiveness in the T&amp;T industry</b> |                                                           |          |
|                                       |                                               |          | 10.03                                                | Extent and effect of taxation .....                       | 119      |
|                                       |                                               |          | 10.01                                                | Ticket taxes and airport charges .....                    | 74       |
|                                       |                                               |          | 10.04                                                | Fuel price level .....                                    | 67       |
|                                       |                                               |          | 10.02                                                | Purchasing power parity .....                             | 63       |

(Disadvantages cont'd. from bottom of right column)

&lt;&lt;&lt; (Cont'd. on bottom of left column)

# Bolivia

## Key indicators

|                                                           |         |
|-----------------------------------------------------------|---------|
| Population (millions), 2005 .....                         | 9.2     |
| Surface area (1,000 square kilometers) .....              | 1,098.6 |
| Gross domestic product (US\$ billions), 2005 .....        | 9.4     |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 2,724   |
| Real GDP growth (percent), 2005 .....                     | 4.1     |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

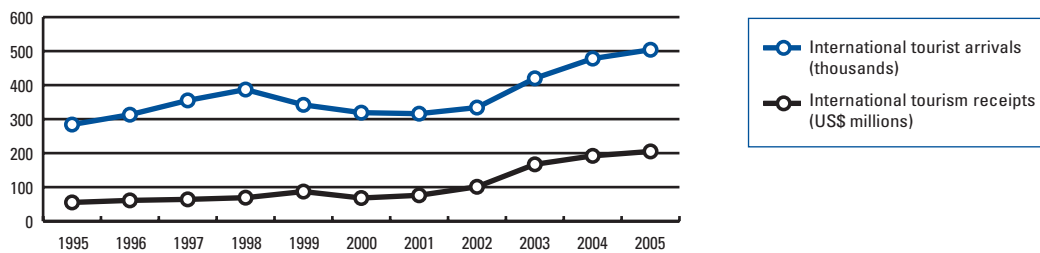
|                               |     | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-----|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 274 | 2.8                 | 4.3                                         |
| Employment (1,000 jobs) ..... | 79  | 2.3                 | 3.0                                         |

### T&T economy, 2006 estimates

|                               |     |     |     |
|-------------------------------|-----|-----|-----|
| GDP (US\$ millions) .....     | 750 | 7.6 | 4.2 |
| Employment (1,000 jobs) ..... | 219 | 6.2 | 2.9 |

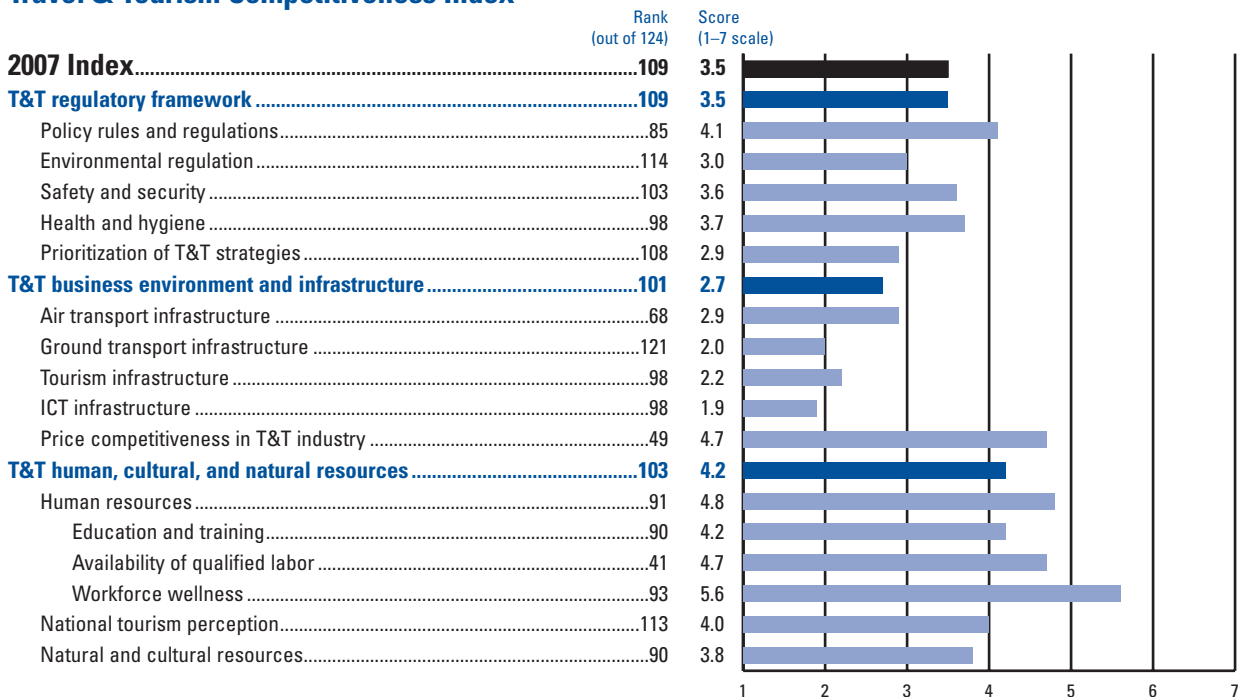
Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2005 .....         | 504 |
| International tourism receipts (US\$ millions), 2005 ..... | 205 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index



Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               | Rank/124 | COMPETITIVE DISADVANTAGES                                           | Rank/124 |
|------------------------------------------------------|----------|---------------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                  |          | <b>Policy rules and regulations</b>                                 |          |
| 1.04 Visa requirements .....1                        |          | 1.03 Rules governing foreign direct investment .....119             |          |
| <b>Prioritization of Travel &amp; Tourism</b>        |          | 1.02 Property rights .....115                                       |          |
| 5.04 T&T fair attendance .....35                     |          | 1.01 Foreign ownership restrictions .....110                        |          |
| <b>Air transport infrastructure</b>                  |          | 1.05 Openness of bilateral Air Service Agreements .....64           |          |
| 6.04 Airport density .....3                          |          | <b>Environmental regulation</b>                                     |          |
| <b>Price competitiveness in the T&amp;T industry</b> |          | 2.03 Government prioritization of sustainable T&T .....123          |          |
| 10.04 Fuel price level .....22                       |          | 2.02 Clarity and stability of environmental regulations .....102    |          |
| 10.02 Purchasing power parity .....40                |          | 2.01 Stringency of environmental regulation .....89                 |          |
| <b>Human resources</b>                               |          | <b>Safety and security</b>                                          |          |
| 11.01 Primary education enrollment .....1            |          | 3.02 Reliability of police services .....120                        |          |
| 11.08 HIV prevalence .....25                         |          | 3.03 Business costs of crime and violence .....96                   |          |
| 11.06 Hiring and firing practices .....43            |          | 3.01 Business costs of terrorism .....62                            |          |
| 11.07 Ease of hiring foreign labor .....47           |          | <b>Health and hygiene</b>                                           |          |
| <b>Natural and cultural resources</b>                |          | 4.01 Gov't efforts to reduce health risks from pandemics .....117   |          |
| 13.03 Nationally protected areas .....31             |          | 4.03 Access to improved sanitation .....91                          |          |
| 13.01 Number of World Heritage sites .....40         |          | 4.02 Physician density .....71                                      |          |
|                                                      |          | 4.04 Access to improved drinking water .....70                      |          |
|                                                      |          | <b>Prioritization of Travel &amp; Tourism</b>                       |          |
|                                                      |          | 5.01 Government prioritization of the T&T industry .....122         |          |
|                                                      |          | 5.03 Effectiveness of marketing and branding .....121               |          |
|                                                      |          | 5.02 T&T government expenditure .....62                             |          |
|                                                      |          | <b>Air transport infrastructure</b>                                 |          |
|                                                      |          | 6.06 International air transport network .....119                   |          |
|                                                      |          | 6.01 Quality of air transport infrastructure .....108               |          |
|                                                      |          | 6.05 Number of operating airlines .....97                           |          |
|                                                      |          | 6.02 Available seat kilometers .....75                              |          |
|                                                      |          | 6.03 Departures per 1,000 population .....61                        |          |
|                                                      |          | <b>Ground transport infrastructure</b>                              |          |
|                                                      |          | 7.03 Port infrastructure .....123                                   |          |
|                                                      |          | 7.04 Domestic transport network .....117                            |          |
|                                                      |          | 7.01 Road infrastructure .....112                                   |          |
|                                                      |          | 7.02 Railroad infrastructure .....94                                |          |
|                                                      |          | <b>Tourism infrastructure</b>                                       |          |
|                                                      |          | 8.02 Presence of major car rental companies .....92                 |          |
|                                                      |          | 8.03 ATMs accepting Visa cards .....78                              |          |
|                                                      |          | 8.01 Hotel rooms .....67                                            |          |
|                                                      |          | <b>ICT infrastructure</b>                                           |          |
|                                                      |          | 9.01 Extent of business Internet use .....106                       |          |
|                                                      |          | 9.02 Internet users .....89                                         |          |
|                                                      |          | 9.03 Telephone lines .....89                                        |          |
|                                                      |          | <b>Price competitiveness in the T&amp;T industry</b>                |          |
|                                                      |          | 10.01 Ticket taxes and airport charges .....107                     |          |
|                                                      |          | 10.03 Extent and effect of taxation .....55                         |          |
|                                                      |          | <b>Human resources</b>                                              |          |
|                                                      |          | 11.03 Quality of the educational system .....122                    |          |
|                                                      |          | 11.05 Extent of staff training .....116                             |          |
|                                                      |          | 11.04 Local availability of research and training services .....102 |          |
|                                                      |          | 11.10 Tuberculosis incidence .....98                                |          |
|                                                      |          | 11.09 Malaria incidence .....93                                     |          |
|                                                      |          | 11.11 Life expectancy .....89                                       |          |
|                                                      |          | 11.02 Secondary education enrollment .....54                        |          |

(Disadvantages cont'd. from bottom of right column)

<<< (Cont'd. on bottom of left column)

# Bosnia and Herzegovina

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 3.9   |
| Surface area (1,000 square kilometers) .....              | 51.2  |
| Gross domestic product (US\$ billions), 2005 .....        | 9.3   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 6,035 |
| Real GDP growth (percent), 2005 .....                     | 5.0   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

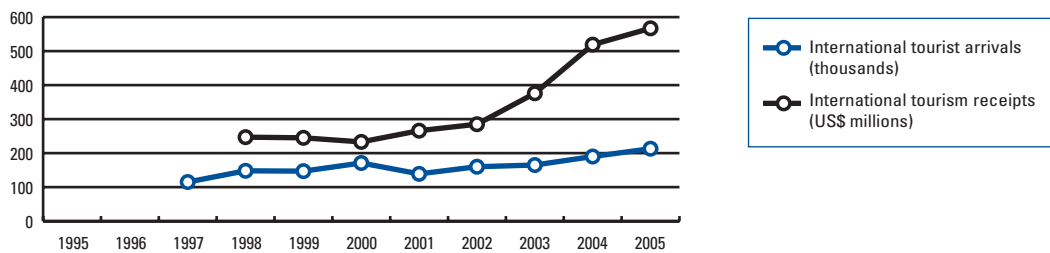
|                               |     | Percent of total | 2007-2016 annual growth (% forecast) |
|-------------------------------|-----|------------------|--------------------------------------|
| GDP (US\$ millions) .....     | 333 | 3.6              | 6.2                                  |
| Employment (1,000 jobs) ..... | 33  | 2.9              | 1.6                                  |

### T&T economy, 2006 estimates

|                               |       |      |     |
|-------------------------------|-------|------|-----|
| GDP (US\$ millions) .....     | 1,099 | 11.8 | 6.2 |
| Employment (1,000 jobs) ..... | 109   | 9.5  | 1.6 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2005 .....         | 213 |
| International tourism receipts (US\$ millions), 2005 ..... | 567 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank (out of 124) | Score (1-7 scale) |
|--------------------------------------------------------------|-------------------|-------------------|
| <b>2007 Index</b> .....                                      | <b>104</b>        | <b>3.5</b>        |
| <b>T&amp;T regulatory framework</b> .....                    | <b>101</b>        | <b>3.6</b>        |
| Policy rules and regulations .....                           | 83                | 4.2               |
| Environmental regulation .....                               | 119               | 2.8               |
| Safety and security .....                                    | 75                | 4.2               |
| Health and hygiene .....                                     | 57                | 4.8               |
| Prioritization of T&T strategies .....                       | 123               | 2.0               |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>94</b>         | <b>2.8</b>        |
| Air transport infrastructure .....                           | 117               | 1.9               |
| Ground transport infrastructure .....                        | 114               | 2.1               |
| Tourism infrastructure .....                                 | 56                | 3.3               |
| ICT infrastructure .....                                     | 61                | 2.7               |
| Price competitiveness in T&T industry .....                  | 92                | 4.1               |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>108</b>        | <b>4.1</b>        |
| Human resources .....                                        | 90                | 4.8               |
| Education and training .....                                 | 103               | 3.9               |
| Availability of qualified labor .....                        | 88                | 3.9               |
| Workforce wellness .....                                     | 51                | 6.6               |
| National tourism perception .....                            | 111               | 4.1               |
| Natural and cultural resources .....                         | 100               | 3.5               |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."



# Bosnia and Herzegovina

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               | Rank/124 | COMPETITIVE DISADVANTAGES                                        | Rank/124 |
|------------------------------------------------------|----------|------------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                  |          | <b>Policy rules and regulations</b>                              |          |
| 1.04 Visa requirements .....                         | 1        | 1.02 Property rights .....                                       | 120      |
|                                                      |          | 1.03 Rules governing foreign direct investment .....             | 114      |
| <b>Safety and security</b>                           |          | 1.01 Foreign ownership restrictions .....                        | 98       |
| 3.01 Business costs of terrorism .....               | 6        | 1.05 Openness of bilateral Air Service Agreements .....          | 70       |
|                                                      |          |                                                                  |          |
| <b>Health and hygiene</b>                            |          | <b>Environmental regulation</b>                                  |          |
| 4.04 Access to improved drinking water .....         | 38       | 2.03 Government prioritization of sustainable T&T .....          | 121      |
| 4.03 Access to improved sanitation .....             | 42       | 2.01 Stringency of environmental regulation .....                | 117      |
|                                                      |          | 2.02 Clarity and stability of environmental regulations .....    | 105      |
|                                                      |          |                                                                  |          |
| <b>Tourism infrastructure</b>                        |          | <b>Safety and security</b>                                       |          |
| 8.02 Presence of major car rental companies .....    | 1        | 3.02 Reliability of police services .....                        | 117      |
|                                                      |          | 3.03 Business costs of crime and violence .....                  | 81       |
|                                                      |          |                                                                  |          |
| <b>Price competitiveness in the T&amp;T industry</b> |          | <b>Health and hygiene</b>                                        |          |
| 10.02 Purchasing power parity .....                  | 44       | 4.01 Gov't efforts to reduce health risks from pandemics .....   | 111      |
|                                                      |          | 4.02 Physician density .....                                     | 66       |
|                                                      |          |                                                                  |          |
| <b>Human resources</b>                               |          | <b>Prioritization of Travel &amp; Tourism</b>                    |          |
| 11.08 HIV prevalence .....                           | 1        | 5.03 Effectiveness of marketing and branding .....               | 118      |
| 11.09 Malaria incidence .....                        | 1        | 5.01 Government prioritization of the T&T industry .....         | 117      |
| 11.11 Life expectancy .....                          | 49       | 5.04 T&T fair attendance .....                                   | 117      |
|                                                      |          | 5.02 T&T government expenditure .....                            | 105      |
|                                                      |          |                                                                  |          |
| <b>Natural and cultural resources</b>                |          | <b>Air transport infrastructure</b>                              |          |
| 13.05 Risk of malaria and yellow fever .....         | 1        | 6.02 Available seat kilometers .....                             | 121      |
|                                                      |          | 6.06 International air transport network .....                   | 118      |
|                                                      |          | 6.01 Quality of air transport infrastructure .....               | 117      |
|                                                      |          | 6.05 Number of operating airlines .....                          | 97       |
|                                                      |          | 6.03 Departures per 1,000 population .....                       | 73       |
|                                                      |          | 6.04 Airport density .....                                       | 69       |
|                                                      |          |                                                                  |          |
|                                                      |          | <b>Ground transport infrastructure</b>                           |          |
|                                                      |          | 7.01 Road infrastructure .....                                   | 120      |
|                                                      |          | 7.03 Port infrastructure .....                                   | 116      |
|                                                      |          | 7.04 Domestic transport network .....                            | 104      |
|                                                      |          | 7.02 Railroad infrastructure .....                               | 90       |
|                                                      |          |                                                                  |          |
|                                                      |          | <b>Tourism infrastructure</b>                                    |          |
|                                                      |          | 8.01 Hotel rooms .....                                           | 83       |
|                                                      |          | 8.03 ATMs accepting Visa cards .....                             | 66       |
|                                                      |          |                                                                  |          |
|                                                      |          | <b>ICT infrastructure</b>                                        |          |
|                                                      |          | 9.02 Internet users .....                                        | 81       |
|                                                      |          | 9.01 Extent of business Internet use .....                       | 62       |
|                                                      |          | 9.03 Telephone lines .....                                       | 52       |
|                                                      |          |                                                                  |          |
|                                                      |          | <b>Price competitiveness in the T&amp;T industry</b>             |          |
|                                                      |          | 10.03 Extent and effect of taxation .....                        | 114      |
|                                                      |          | 10.04 Fuel price level .....                                     | 92       |
|                                                      |          | 10.01 Ticket taxes and airport charges .....                     | 88       |
|                                                      |          |                                                                  |          |
|                                                      |          | <b>Human resources</b>                                           |          |
|                                                      |          | 11.01 Primary education enrollment .....                         | 114      |
|                                                      |          | 11.07 Ease of hiring foreign labor .....                         | 106      |
|                                                      |          | 11.02 Secondary education enrollment .....                       | 102      |
|                                                      |          | 11.05 Extent of staff training .....                             | 95       |
|                                                      |          | 11.06 Hiring and firing practices .....                          | 73       |
|                                                      |          | 11.04 Local availability of research and training services ..... | 71       |
|                                                      |          | 11.03 Quality of the educational system .....                    | 63       |
|                                                      |          | 11.10 Tuberculosis incidence .....                               | 55       |

(Disadvantages cont'd. from bottom of right column)

| COMPETITIVE DISADVANTAGES                           | Rank/124 |
|-----------------------------------------------------|----------|
| <b>National tourism perception</b>                  |          |
| 12.03 Recommendation to extend business trips ..... | 117      |
| 12.01 Tourism openness .....                        | 90       |
| 12.02 Attitude toward tourists .....                | 60       |
|                                                     |          |
| <b>Natural and cultural resources</b>               |          |
| 13.02 Carbon dioxide damage .....                   | 109      |
| 13.03 Nationally protected areas .....              | 104      |
| 13.04 Business concern for ecosystems .....         | 104      |
| 13.01 Number of World Heritage sites .....          | 87       |

<<< (Cont'd. on bottom of left column)

# Botswana

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 1.8    |
| Surface area (1,000 square kilometers) .....              | 581.7  |
| Gross domestic product (US\$ billions), 2005 .....        | 10.2   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 11,410 |
| Real GDP growth (percent), 2005 .....                     | 6.2    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

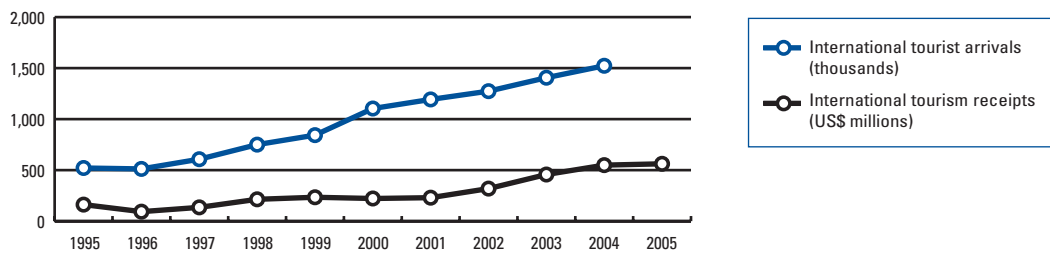
|                               |     | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-----|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 334 | 3.3                 | 4.9                                         |
| Employment (1,000 jobs) ..... | 14  | 4.6                 | 2.3                                         |

### T&T economy, 2006 estimates

|                               |     |     |     |
|-------------------------------|-----|-----|-----|
| GDP (US\$ millions) .....     | 809 | 8.0 | 4.8 |
| Employment (1,000 jobs) ..... | 29  | 9.6 | 2.3 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2004 .....         | 1,523 |
| International tourism receipts (US\$ millions), 2005 ..... | 562   |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>70</b>            | <b>4.0</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>64</b>            | <b>4.2</b>           |
| Policy rules and regulations .....                           | 59                   | 4.7                  |
| Environmental regulation .....                               | 59                   | 4.1                  |
| Safety and security .....                                    | 55                   | 4.7                  |
| Health and hygiene .....                                     | 86                   | 4.1                  |
| Prioritization of T&T strategies .....                       | 83                   | 3.4                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>69</b>            | <b>3.3</b>           |
| Air transport infrastructure .....                           | 59                   | 3.1                  |
| Ground transport infrastructure .....                        | 66                   | 3.5                  |
| Tourism infrastructure .....                                 | 73                   | 2.7                  |
| ICT infrastructure .....                                     | 97                   | 1.9                  |
| Price competitiveness in T&T industry .....                  | 16                   | 5.3                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>85</b>            | <b>4.5</b>           |
| Human resources .....                                        | 113                  | 3.5                  |
| Education and training .....                                 | 77                   | 4.5                  |
| Availability of qualified labor .....                        | 109                  | 3.6                  |
| Workforce wellness .....                                     | 117                  | 2.4                  |
| National tourism perception .....                            | 28                   | 5.6                  |
| Natural and cultural resources .....                         | 62                   | 4.3                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               |                                                           | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                            | Rank/124 |
|------------------------------------------------------|-----------------------------------------------------------|----------|------------------------------------------------------|------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                  |                                                           |          | <b>Policy rules and regulations</b>                  |                                                            |          |
| 1.04                                                 | Visa requirements .....                                   | 15       | 1.05                                                 | Openness of bilateral Air Service Agreements .....         | 96       |
| <b>Environmental regulation</b>                      |                                                           |          | 1.03                                                 | Rules governing foreign direct investment .....            | 68       |
| 2.03                                                 | Government prioritization of sustainable T&T .....        | 38       | 1.01                                                 | Foreign ownership restrictions .....                       | 57       |
| <b>Safety and security</b>                           |                                                           |          | 1.02                                                 | Property rights .....                                      | 52       |
| 3.01                                                 | Business costs of terrorism .....                         | 22       | <b>Environmental regulation</b>                      |                                                            |          |
| <b>Health and hygiene</b>                            |                                                           |          | 2.01                                                 | Stringency of environmental regulation .....               | 76       |
| 4.01                                                 | Gov't efforts to reduce health risks from pandemics ..... | 33       | 2.02                                                 | Clarity and stability of environmental regulations .....   | 54       |
| 4.04                                                 | Access to improved drinking water .....                   | 45       | <b>Safety and security</b>                           |                                                            |          |
| <b>Prioritization of Travel &amp; Tourism</b>        |                                                           |          | 3.03                                                 | Business costs of crime and violence .....                 | 66       |
| 5.01                                                 | Government prioritization of the T&T industry .....       | 25       | 3.02                                                 | Reliability of police services .....                       | 62       |
| 5.03                                                 | Effectiveness of marketing and branding .....             | 49       | <b>Health and hygiene</b>                            |                                                            |          |
| <b>Air transport infrastructure</b>                  |                                                           |          | 4.02                                                 | Physician density .....                                    | 96       |
| 6.04                                                 | Airport density .....                                     | 7        | 4.03                                                 | Access to improved sanitation .....                        | 96       |
| 6.03                                                 | Departures per 1,000 population .....                     | 47       | <b>Prioritization of Travel &amp; Tourism</b>        |                                                            |          |
| <b>Ground transport infrastructure</b>               |                                                           |          | 5.04                                                 | T&T fair attendance .....                                  | 105      |
| 7.02                                                 | Railroad infrastructure .....                             | 48       | 5.02                                                 | T&T government expenditure .....                           | 78       |
| <b>Price competitiveness in the T&amp;T industry</b> |                                                           |          | <b>Air transport infrastructure</b>                  |                                                            |          |
| 10.01                                                | Ticket taxes and airport charges .....                    | 16       | 6.05                                                 | Number of operating airlines .....                         | 122      |
| 10.03                                                | Extent and effect of taxation .....                       | 16       | 6.02                                                 | Available seat kilometers .....                            | 120      |
| 10.04                                                | Fuel price level .....                                    | 49       | 6.06                                                 | International air transport network .....                  | 92       |
| <b>Human resources</b>                               |                                                           |          | 6.01                                                 | Quality of air transport infrastructure .....              | 87       |
| 11.01                                                | Primary education enrollment .....                        | 1        | <b>Ground transport infrastructure</b>               |                                                            |          |
| <b>Natural and cultural resources</b>                |                                                           |          | 7.03                                                 | Port infrastructure .....                                  | 86       |
| 13.03                                                | Nationally protected areas .....                          | 19       | 7.04                                                 | Domestic transport network .....                           | 71       |
| 13.02                                                | Carbon dioxide damage .....                               | 47       | 7.01                                                 | Road infrastructure .....                                  | 55       |
|                                                      |                                                           |          | <b>Tourism infrastructure</b>                        |                                                            |          |
|                                                      |                                                           |          | 8.01                                                 | Hotel rooms .....                                          | 71       |
|                                                      |                                                           |          | 8.02                                                 | Presence of major car rental companies .....               | 66       |
|                                                      |                                                           |          | 8.03                                                 | ATMs accepting Visa cards .....                            | 54       |
|                                                      |                                                           |          | <b>ICT infrastructure</b>                            |                                                            |          |
|                                                      |                                                           |          | 9.01                                                 | Extent of business Internet use .....                      | 110      |
|                                                      |                                                           |          | 9.02                                                 | Internet users .....                                       | 91       |
|                                                      |                                                           |          | 9.03                                                 | Telephone lines .....                                      | 86       |
|                                                      |                                                           |          | <b>Price competitiveness in the T&amp;T industry</b> |                                                            |          |
|                                                      |                                                           |          | 10.02                                                | Purchasing power parity .....                              | 65       |
|                                                      |                                                           |          | <b>Human resources</b>                               |                                                            |          |
|                                                      |                                                           |          | 11.08                                                | HIV prevalence .....                                       | 124      |
|                                                      |                                                           |          | 11.11                                                | Life expectancy .....                                      | 121      |
|                                                      |                                                           |          | 11.07                                                | Ease of hiring foreign labor .....                         | 116      |
|                                                      |                                                           |          | 11.10                                                | Tuberculosis incidence .....                               | 113      |
|                                                      |                                                           |          | 11.09                                                | Malaria incidence .....                                    | 104      |
|                                                      |                                                           |          | 11.04                                                | Local availability of research and training services ..... | 101      |
|                                                      |                                                           |          | 11.06                                                | Hiring and firing practices .....                          | 86       |
|                                                      |                                                           |          | 11.02                                                | Secondary education enrollment .....                       | 78       |
|                                                      |                                                           |          | 11.05                                                | Extent of staff training .....                             | 68       |
|                                                      |                                                           |          | 11.03                                                | Quality of the educational system .....                    | 57       |
|                                                      |                                                           |          | <b>National tourism perception</b>                   |                                                            |          |
|                                                      |                                                           |          | 12.02                                                | Attitude toward tourists .....                             | 96       |
|                                                      |                                                           |          | 12.03                                                | Recommendation to extend business trips .....              | 86       |
|                                                      |                                                           |          | <b>Natural and cultural resources</b>                |                                                            |          |
|                                                      |                                                           |          | 13.01                                                | Number of World Heritage sites .....                       | 87       |
|                                                      |                                                           |          | 13.05                                                | Risk of malaria and yellow fever .....                     | 80       |
|                                                      |                                                           |          | 13.04                                                | Business concern for ecosystems .....                      | 56       |

# Brazil

## Key indicators

|                                                           |         |
|-----------------------------------------------------------|---------|
| Population (millions), 2005 .....                         | 186.4   |
| Surface area (1,000 square kilometers) .....              | 8,514.9 |
| Gross domestic product (US\$ billions), 2005 .....        | 795.7   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 8,561   |
| Real GDP growth (percent), 2005 .....                     | 2.3     |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

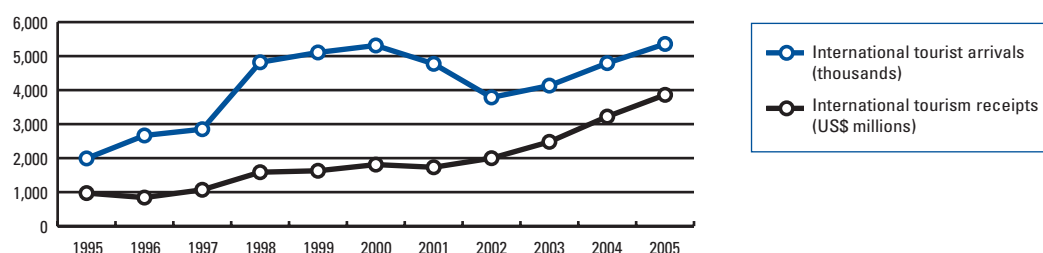
|                               |        | Percent of total | 2007-2016 annual growth (% forecast) |
|-------------------------------|--------|------------------|--------------------------------------|
| GDP (US\$ millions) .....     | 25,278 | 2.8              | 3.0                                  |
| Employment (1,000 jobs) ..... | 2,337  | 2.7              | 1.6                                  |

### T&T economy, 2006 estimates

|                               |        |     |     |
|-------------------------------|--------|-----|-----|
| GDP (US\$ millions) .....     | 60,123 | 6.7 | 3.8 |
| Employment (1,000 jobs) ..... | 5,495  | 6.4 | 2.2 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 5,358 |
| International tourism receipts (US\$ millions), 2005 ..... | 3,861 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank (out of 124) | Score (1-7 scale) |
|--------------------------------------------------------------|-------------------|-------------------|
| <b>2007 Index</b> .....                                      | <b>59</b>         | <b>4.2</b>        |
| <b>T&amp;T regulatory framework</b> .....                    | <b>67</b>         | <b>4.1</b>        |
| Policy rules and regulations .....                           | 75                | 4.4               |
| Environmental regulation .....                               | 46                | 4.4               |
| Safety and security .....                                    | 90                | 3.9               |
| Health and hygiene .....                                     | 72                | 4.4               |
| Prioritization of T&T strategies .....                       | 71                | 3.6               |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>48</b>         | <b>3.8</b>        |
| Air transport infrastructure .....                           | 28                | 3.9               |
| Ground transport infrastructure .....                        | 79                | 3.0               |
| Tourism infrastructure .....                                 | 28                | 4.4               |
| ICT infrastructure .....                                     | 48                | 3.2               |
| Price competitiveness in T&T industry .....                  | 80                | 4.3               |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>67</b>         | <b>4.7</b>        |
| Human resources .....                                        | 83                | 4.9               |
| Education and training .....                                 | 69                | 4.6               |
| Availability of qualified labor .....                        | 106               | 3.7               |
| Workforce wellness .....                                     | 71                | 6.3               |
| National tourism perception .....                            | 87                | 4.5               |
| Natural and cultural resources .....                         | 42                | 4.7               |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                            | Rank/124 | COMPETITIVE DISADVANTAGES                                        | Rank/124 |
|-------------------------------------------------------------------|----------|------------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                               |          | <b>Policy rules and regulations</b>                              |          |
| 1.05 Openness of bilateral Air Service Agreements .....36         |          | 1.01 Foreign ownership restrictions.....89                       |          |
|                                                                   |          | 1.04 Visa requirements .....89                                   |          |
| <b>Environmental regulation</b>                                   |          | 1.03 Rules governing foreign direct investment .....81           |          |
| 2.01 Stringency of environmental regulation .....28               |          | 1.02 Property rights .....62                                     |          |
| 2.02 Clarity and stability of environmental regulations .....50   |          |                                                                  |          |
|                                                                   |          | <b>Environmental regulation</b>                                  |          |
| <b>Safety and security</b>                                        |          | 2.03 Government prioritization of sustainable T&T .....87        |          |
| 3.01 Business costs of terrorism .....3                           |          |                                                                  |          |
|                                                                   |          | <b>Safety and security</b>                                       |          |
| <b>Prioritization of Travel &amp; Tourism</b>                     |          | 3.03 Business costs of crime and violence.....111                |          |
| 5.04 T&T fair attendance .....23                                  |          | 3.02 Reliability of police services .....107                     |          |
|                                                                   |          |                                                                  |          |
| <b>Air transport infrastructure</b>                               |          | <b>Health and hygiene</b>                                        |          |
| 6.02 Available seat kilometers.....13                             |          | 4.01 Gov't efforts to reduce health risks from pandemics .....95 |          |
| 6.04 Airport density .....24                                      |          | 4.02 Physician density .....74                                   |          |
| 6.05 Number of operating airlines .....37                         |          | 4.04 Access to improved drinking water .....64                   |          |
| 6.03 Departures per 1,000 population.....50                       |          | 4.03 Access to improved sanitation .....60                       |          |
|                                                                   |          |                                                                  |          |
| <b>Ground transport infrastructure</b>                            |          | <b>Prioritization of Travel &amp; Tourism</b>                    |          |
| 7.04 Domestic transport network .....40                           |          | 5.01 Government prioritization of the T&T industry.....94        |          |
|                                                                   |          | 5.03 Effectiveness of marketing and branding .....85             |          |
| <b>Tourism infrastructure</b>                                     |          | 5.02 T&T government expenditure .....68                          |          |
| 8.02 Presence of major car rental companies.....1                 |          |                                                                  |          |
|                                                                   |          | <b>Air transport infrastructure</b>                              |          |
| <b>ICT infrastructure</b>                                         |          | 6.01 Quality of air transport infrastructure .....57             |          |
| 9.01 Extent of business Internet use .....23                      |          | 6.06 International air transport network .....51                 |          |
|                                                                   |          |                                                                  |          |
| <b>Price competitiveness in the T&amp;T industry</b>              |          | <b>Ground transport infrastructure</b>                           |          |
| 10.04 Fuel price level .....34                                    |          | 7.01 Road infrastructure .....96                                 |          |
|                                                                   |          | 7.03 Port infrastructure .....88                                 |          |
| <b>Human resources</b>                                            |          | 7.02 Railroad infrastructure .....81                             |          |
| 11.02 Secondary education enrollment.....1                        |          |                                                                  |          |
| 11.04 Local availability of research and training services.....32 |          | <b>Tourism infrastructure</b>                                    |          |
| 11.05 Extent of staff training .....38                            |          | 8.03 ATMs accepting Visa cards .....61                           |          |
|                                                                   |          |                                                                  |          |
| <b>National tourism perception</b>                                |          | <b>ICT infrastructure</b>                                        |          |
| 12.02 Attitude toward tourists .....40                            |          | 9.02 Internet users .....58                                      |          |
| 12.03 Recommendation to extend business trips .....40             |          | 9.03 Telephone lines .....55                                     |          |
|                                                                   |          |                                                                  |          |
| <b>Natural and cultural resources</b>                             |          | <b>Price competitiveness in the T&amp;T industry</b>             |          |
| 13.01 Number of World Heritage sites .....11                      |          | 10.03 Extent and effect of taxation.....124                      |          |
| 13.04 Business concern for ecosystems .....42                     |          | 10.01 Ticket taxes and airport charges.....85                    |          |
|                                                                   |          | 10.02 Purchasing power parity .....62                            |          |
|                                                                   |          |                                                                  |          |
|                                                                   |          | <b>Human resources</b>                                           |          |
|                                                                   |          | 11.03 Quality of the educational system .....114                 |          |
|                                                                   |          | 11.06 Hiring and firing practices.....111                        |          |
|                                                                   |          | 11.09 Malaria incidence.....98                                   |          |
|                                                                   |          | 11.08 HIV prevalence .....82                                     |          |
|                                                                   |          | 11.11 Life expectancy .....75                                    |          |
|                                                                   |          | 11.07 Ease of hiring foreign labor .....74                       |          |
|                                                                   |          | 11.10 Tuberculosis incidence .....64                             |          |
|                                                                   |          |                                                                  |          |
|                                                                   |          | <b>National tourism perception</b>                               |          |
|                                                                   |          | 12.01 Tourism openness .....96                                   |          |
|                                                                   |          |                                                                  |          |
|                                                                   |          | <b>Natural and cultural resources</b>                            |          |
|                                                                   |          | 13.05 Risk of malaria and yellow fever .....94                   |          |
|                                                                   |          | 13.03 Nationally protected areas.....64                          |          |
|                                                                   |          | 13.02 Carbon dioxide damage.....52                               |          |

# Bulgaria

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 7.7   |
| Surface area (1,000 square kilometers) .....              | 111.0 |
| Gross domestic product (US\$ billions), 2005 .....        | 26.7  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 9,223 |
| Real GDP growth (percent), 2005 .....                     | 5.5   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

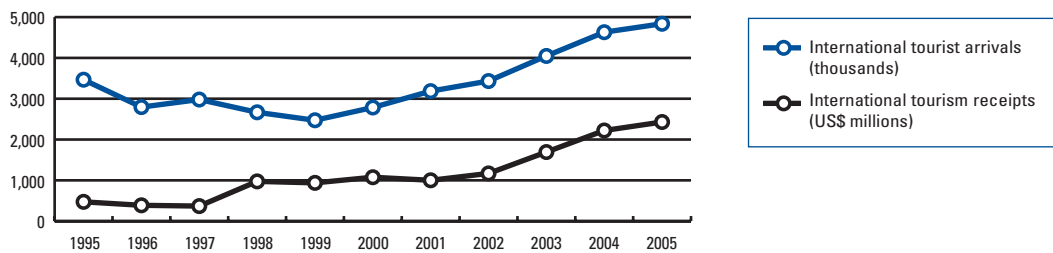
|                               |       | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 1,320 | 4.6                 | 4.0                                         |
| Employment (1,000 jobs) ..... | 117   | 4.0                 | -0.7                                        |

### T&T economy, 2006 estimates

|                               |       |      |      |
|-------------------------------|-------|------|------|
| GDP (US\$ millions) .....     | 4,576 | 16.0 | 3.9  |
| Employment (1,000 jobs) ..... | 400   | 13.6 | -0.7 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 4,837 |
| International tourism receipts (US\$ millions), 2005 ..... | 2,429 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>54</b>            | <b>4.3</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>66</b>            | <b>4.2</b>           |
| Policy rules and regulations .....                           | 82                   | 4.2                  |
| Environmental regulation .....                               | 103                  | 3.2                  |
| Safety and security .....                                    | 107                  | 3.5                  |
| Health and hygiene .....                                     | 27                   | 5.8                  |
| Prioritization of T&T strategies .....                       | 45                   | 4.1                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>56</b>            | <b>3.6</b>           |
| Air transport infrastructure .....                           | 76                   | 2.8                  |
| Ground transport infrastructure .....                        | 70                   | 3.3                  |
| Tourism infrastructure .....                                 | 25                   | 4.4                  |
| ICT infrastructure .....                                     | 50                   | 3.1                  |
| Price competitiveness in T&T industry .....                  | 59                   | 4.6                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>41</b>            | <b>5.1</b>           |
| Human resources .....                                        | 67                   | 5.1                  |
| Education and training .....                                 | 67                   | 4.6                  |
| Availability of qualified labor .....                        | 84                   | 4.0                  |
| Workforce wellness .....                                     | 48                   | 6.6                  |
| National tourism perception .....                            | 30                   | 5.6                  |
| Natural and cultural resources .....                         | 43                   | 4.7                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               |                                               | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                           | Rank/124 |
|------------------------------------------------------|-----------------------------------------------|----------|------------------------------------------------------|-----------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                  |                                               |          | <b>Policy rules and regulations</b>                  |                                                           |          |
| 1.04                                                 | Visa requirements .....                       | 1        | 1.03                                                 | Rules governing foreign direct investment .....           | 113      |
| <b>Health and hygiene</b>                            |                                               |          | 1.01                                                 | Foreign ownership restrictions.....                       | 101      |
| 4.03                                                 | Access to improved sanitation .....           | 1        | 1.05                                                 | Openness of bilateral Air Service Agreements .....        | 93       |
| 4.04                                                 | Access to improved drinking water .....       | 1        | 1.02                                                 | Property rights .....                                     | 91       |
| 4.02                                                 | Physician density .....                       | 13       | <b>Environmental regulation</b>                      |                                                           |          |
| <b>Prioritization of Travel &amp; Tourism</b>        |                                               |          | 2.02                                                 | Clarity and stability of environmental regulations .....  | 107      |
| 5.04                                                 | T&T fair attendance .....                     | 15       | 2.03                                                 | Government prioritization of sustainable T&T .....        | 104      |
| <b>Air transport infrastructure</b>                  |                                               |          | 2.01                                                 | Stringency of environmental regulation .....              | 90       |
| 6.04                                                 | Airport density .....                         | 17       | <b>Safety and security</b>                           |                                                           |          |
| <b>Ground transport infrastructure</b>               |                                               |          | 3.02                                                 | Reliability of police services .....                      | 116      |
| 7.02                                                 | Railroad infrastructure .....                 | 45       | 3.03                                                 | Business costs of crime and violence.....                 | 97       |
| <b>Tourism infrastructure</b>                        |                                               |          | 3.01                                                 | Business costs of terrorism .....                         | 95       |
| 8.01                                                 | Hotel rooms.....                              | 20       | <b>Health and hygiene</b>                            |                                                           |          |
| 8.03                                                 | ATMs accepting Visa cards .....               | 30       | 4.01                                                 | Gov't efforts to reduce health risks from pandemics ..... | 102      |
| 8.02                                                 | Presence of major car rental companies.....   | 35       | <b>Prioritization of Travel &amp; Tourism</b>        |                                                           |          |
| <b>ICT infrastructure</b>                            |                                               |          | 5.03                                                 | Effectiveness of marketing and branding .....             | 83       |
| 9.03                                                 | Telephone lines.....                          | 35       | 5.02                                                 | T&T government expenditure .....                          | 59       |
| <b>Price competitiveness in the T&amp;T industry</b> |                                               |          | 5.01                                                 | Government prioritization of the T&T industry .....       | 58       |
| 10.01                                                | Ticket taxes and airport charges.....         | 17       | <b>Air transport infrastructure</b>                  |                                                           |          |
| 10.02                                                | Purchasing power parity.....                  | 39       | 6.06                                                 | International air transport network .....                 | 99       |
| <b>Human resources</b>                               |                                               |          | 6.01                                                 | Quality of air transport infrastructure .....             | 92       |
| 11.01                                                | Primary education enrollment .....            | 1        | 6.03                                                 | Departures per 1,000 population.....                      | 78       |
| 11.02                                                | Secondary education enrollment.....           | 1        | 6.02                                                 | Available seat kilometers.....                            | 76       |
| 11.08                                                | HIV prevalence .....                          | 1        | 6.05                                                 | Number of operating airlines .....                        | 54       |
| 11.09                                                | Malaria incidence.....                        | 1        | <b>Ground transport infrastructure</b>               |                                                           |          |
| 11.10                                                | Tuberculosis incidence .....                  | 44       | 7.01                                                 | Road infrastructure.....                                  | 97       |
| <b>National tourism perception</b>                   |                                               |          | 7.03                                                 | Port infrastructure .....                                 | 71       |
| 12.01                                                | Tourism openness .....                        | 13       | 7.04                                                 | Domestic transport network .....                          | 66       |
| 12.03                                                | Recommendation to extend business trips ..... | 41       | <b>ICT infrastructure</b>                            |                                                           |          |
| <b>Natural and cultural resources</b>                |                                               |          | 9.01                                                 | Extent of business Internet use .....                     | 86       |
| 13.05                                                | Risk of malaria and yellow fever .....        | 1        | 9.02                                                 | Internet users .....                                      | 53       |
| 13.01                                                | Number of World Heritage sites .....          | 21       | <b>Price competitiveness in the T&amp;T industry</b> |                                                           |          |
|                                                      |                                               |          | 10.03                                                | Extent and effect of taxation.....                        | 98       |
|                                                      |                                               |          | 10.04                                                | Fuel price level .....                                    | 81       |
|                                                      |                                               |          | <b>Human resources</b>                               |                                                           |          |
|                                                      |                                               |          | 11.05                                                | Extent of staff training.....                             | 113      |
|                                                      |                                               |          | 11.07                                                | Ease of hiring foreign labor .....                        | 91       |
|                                                      |                                               |          | 11.03                                                | Quality of the educational system .....                   | 83       |
|                                                      |                                               |          | 11.04                                                | Local availability of research and training services..... | 80       |
|                                                      |                                               |          | 11.06                                                | Hiring and firing practices.....                          | 76       |
|                                                      |                                               |          | 11.11                                                | Life expectancy .....                                     | 53       |
|                                                      |                                               |          | <b>National tourism perception</b>                   |                                                           |          |
|                                                      |                                               |          | 12.02                                                | Attitude toward tourists .....                            | 93       |
|                                                      |                                               |          | <b>Natural and cultural resources</b>                |                                                           |          |
|                                                      |                                               |          | 13.04                                                | Business concern for ecosystems .....                     | 105      |
|                                                      |                                               |          | 13.02                                                | Carbon dioxide damage.....                                | 103      |
|                                                      |                                               |          | 13.03                                                | Nationally protected areas.....                           | 81       |



# Burkina Faso

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 13.2  |
| Surface area (1,000 square kilometers) .....              | 274.0 |
| Gross domestic product (US\$ billions), 2005 .....        | 5.6   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 1,285 |
| Real GDP growth (percent), 2005 .....                     | 7.1   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

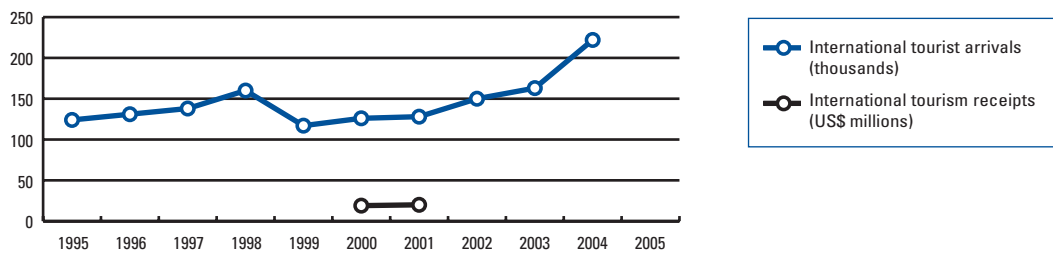
|                               |    | Percent of total | 2007–2016 annual growth (% forecast) |
|-------------------------------|----|------------------|--------------------------------------|
| GDP (US\$ millions) .....     | 69 | 1.2              | 4.4                                  |
| Employment (1,000 jobs) ..... | 24 | 0.9              | 2.7                                  |

### T&T economy, 2006 estimates

|                               |     |     |     |
|-------------------------------|-----|-----|-----|
| GDP (US\$ millions) .....     | 194 | 3.2 | 5.0 |
| Employment (1,000 jobs) ..... | 67  | 2.6 | 3.4 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2004 .....         | 222 |
| International tourism receipts (US\$ millions), 2001 ..... | 20  |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank (out of 124) | Score (1–7 scale) |
|--------------------------------------------------------------|-------------------|-------------------|
| <b>2007 Index .....</b>                                      | <b>113</b>        | <b>3.4</b>        |
| <b>T&amp;T regulatory framework .....</b>                    | <b>102</b>        | <b>3.6</b>        |
| Policy rules and regulations .....                           | 105               | 3.7               |
| Environmental regulation .....                               | 57                | 4.2               |
| Safety and security .....                                    | 65                | 4.5               |
| Health and hygiene .....                                     | 120               | 2.6               |
| Prioritization of T&T strategies .....                       | 103               | 3.1               |
| <b>T&amp;T business environment and infrastructure .....</b> | <b>115</b>        | <b>2.5</b>        |
| Air transport infrastructure .....                           | 119               | 1.8               |
| Ground transport infrastructure .....                        | 103               | 2.4               |
| Tourism infrastructure .....                                 | 109               | 1.9               |
| ICT infrastructure .....                                     | 110               | 1.7               |
| Price competitiveness in T&T industry .....                  | 67                | 4.5               |
| <b>T&amp;T human, cultural, and natural resources .....</b>  | <b>106</b>        | <b>4.2</b>        |
| Human resources .....                                        | 117               | 3.2               |
| Education and training .....                                 | 124               | 2.2               |
| Availability of qualified labor .....                        | 46                | 4.6               |
| Workforce wellness .....                                     | 114               | 2.8               |
| National tourism perception .....                            | 12                | 6.2               |
| Natural and cultural resources .....                         | 114               | 3.2               |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                           | Rank/124 | COMPETITIVE DISADVANTAGES                                         | Rank/124 |
|------------------------------------------------------------------|----------|-------------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                              |          | <b>Policy rules and regulations</b>                               |          |
| 1.03 Rules governing foreign direct investment .....31           |          | 1.05 Openness of bilateral Air Service Agreements .....120        |          |
| 1.01 Foreign ownership restrictions.....45                       |          | 1.04 Visa requirements .....106                                   |          |
|                                                                  |          | 1.02 Property rights.....68                                       |          |
| <b>Environmental regulation</b>                                  |          | <b>Environmental regulation</b>                                   |          |
| 2.03 Government prioritization of sustainable T&T .....31        |          | 2.01 Stringency of environmental regulation .....67               |          |
|                                                                  |          | 2.02 Clarity and stability of environmental regulations .....61   |          |
| <b>Health and hygiene</b>                                        |          | <b>Safety and security</b>                                        |          |
| 4.01 Gov't efforts to reduce health risks from pandemics .....49 |          | 3.02 Reliability of police services .....66                       |          |
|                                                                  |          | 3.03 Business costs of crime and violence.....65                  |          |
| <b>Prioritization of Travel &amp; Tourism</b>                    |          | 3.01 Business costs of terrorism .....55                          |          |
| 5.03 Effectiveness of marketing and branding .....40             |          |                                                                   |          |
|                                                                  |          | <b>Health and hygiene</b>                                         |          |
| <b>Price competitiveness in the T&amp;T industry</b>             |          | 4.02 Physician density .....115                                   |          |
| 10.02 Purchasing power parity .....31                            |          | 4.03 Access to improved sanitation .....110                       |          |
|                                                                  |          | 4.04 Access to improved drinking water .....107                   |          |
| <b>Human resources</b>                                           |          | <b>Prioritization of Travel &amp; Tourism</b>                     |          |
| 11.07 Ease of hiring foreign labor .....35                       |          | 5.04 T&T fair attendance .....117                                 |          |
|                                                                  |          | 5.02 T&T government expenditure .....91                           |          |
| <b>National tourism perception</b>                               |          | 5.01 Government prioritization of the T&T industry .....72        |          |
| 12.02 Attitude toward tourists .....1                            |          |                                                                   |          |
|                                                                  |          | <b>Air transport infrastructure</b>                               |          |
| <b>Natural and cultural resources</b>                            |          | 6.06 International air transport network .....117                 |          |
| 13.02 Carbon dioxide damage.....11                               |          | 6.02 Available seat kilometers.....115                            |          |
| 13.03 Nationally protected areas.....38                          |          | 6.01 Quality of air transport infrastructure .....111             |          |
|                                                                  |          | 6.05 Number of operating airlines.....109                         |          |
|                                                                  |          | 6.03 Departures per 1,000 population.....105                      |          |
|                                                                  |          | 6.04 Airport density .....100                                     |          |
|                                                                  |          | <b>Ground transport infrastructure</b>                            |          |
|                                                                  |          | 7.03 Port infrastructure .....111                                 |          |
|                                                                  |          | 7.01 Road infrastructure.....105                                  |          |
|                                                                  |          | 7.04 Domestic transport network .....97                           |          |
|                                                                  |          | 7.02 Railroad infrastructure .....77                              |          |
|                                                                  |          | <b>Tourism infrastructure</b>                                     |          |
|                                                                  |          | 8.03 ATMs accepting Visa cards .....103                           |          |
|                                                                  |          | 8.02 Presence of major car rental companies.....102               |          |
|                                                                  |          | <b>ICT infrastructure</b>                                         |          |
|                                                                  |          | 9.02 Internet users .....116                                      |          |
|                                                                  |          | 9.03 Telephone lines.....115                                      |          |
|                                                                  |          | 9.01 Extent of business Internet use .....93                      |          |
|                                                                  |          | <b>Price competitiveness in the T&amp;T industry</b>              |          |
|                                                                  |          | 10.04 Fuel price level .....86                                    |          |
|                                                                  |          | 10.01 Ticket taxes and airport charges.....80                     |          |
|                                                                  |          | 10.03 Extent and effect of taxation.....57                        |          |
|                                                                  |          | <b>Human resources</b>                                            |          |
|                                                                  |          | 11.01 Primary education enrollment .....122                       |          |
|                                                                  |          | 11.02 Secondary education enrollment.....119                      |          |
|                                                                  |          | 11.03 Quality of the educational system .....115                  |          |
|                                                                  |          | 11.09 Malaria incidence.....115                                   |          |
|                                                                  |          | 11.11 Life expectancy .....111                                    |          |
|                                                                  |          | 11.08 HIV prevalence .....109                                     |          |
|                                                                  |          | 11.05 Extent of staff training.....106                            |          |
|                                                                  |          | 11.10 Tuberculosis incidence .....104                             |          |
|                                                                  |          | 11.04 Local availability of research and training services.....91 |          |
|                                                                  |          | 11.06 Hiring and firing practices.....63                          |          |

(Disadvantages cont'd. from bottom of right column)

&lt;&lt;&lt; (Cont'd. on bottom of left column)

# Burundi

## Key indicators

|                                                           |      |
|-----------------------------------------------------------|------|
| Population (millions), 2005 .....                         | 7.5  |
| Surface area (1,000 square kilometers) .....              | 27.8 |
| Gross domestic product (US\$ billions), 2005 .....        | 0.8  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 739  |
| Real GDP growth (percent), 2005 .....                     | 0.9  |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

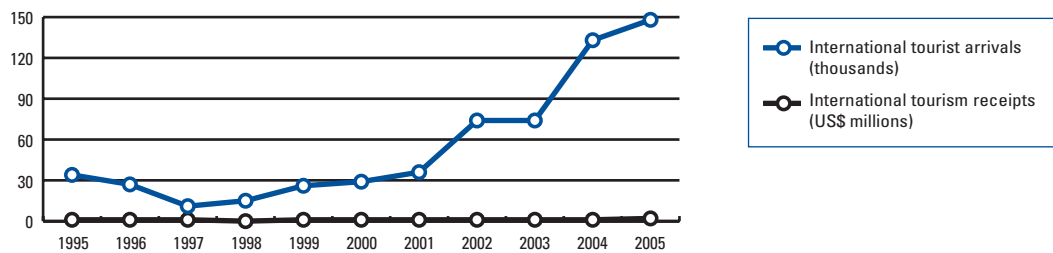
|                               |    | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|----|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 22 | 2.2                 | 4.3                                         |
| Employment (1,000 jobs) ..... | 28 | 1.7                 | 1.8                                         |

### T&T economy, 2006 estimates

|                               |    |     |     |
|-------------------------------|----|-----|-----|
| GDP (US\$ millions) .....     | 43 | 4.3 | 4.6 |
| Employment (1,000 jobs) ..... | 55 | 3.4 | 2.0 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2005 .....         | 148 |
| International tourism receipts (US\$ millions), 2005 ..... | 2   |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index .....</b>                                      | <b>123</b>           | <b>2.9</b>           |
| <b>T&amp;T regulatory framework .....</b>                    | <b>123</b>           | <b>2.8</b>           |
| Policy rules and regulations .....                           | 122                  | 2.9                  |
| Environmental regulation .....                               | 118                  | 2.8                  |
| Safety and security .....                                    | 108                  | 3.5                  |
| Health and hygiene .....                                     | 111                  | 3.2                  |
| Prioritization of T&T strategies .....                       | 124                  | 1.8                  |
| <b>T&amp;T business environment and infrastructure .....</b> | <b>123</b>           | <b>2.3</b>           |
| Air transport infrastructure .....                           | 123                  | 1.6                  |
| Ground transport infrastructure .....                        | 117                  | 2.1                  |
| Tourism infrastructure .....                                 | 111                  | 1.9                  |
| ICT infrastructure .....                                     | 123                  | 1.5                  |
| Price competitiveness in T&T industry .....                  | 66                   | 4.5                  |
| <b>T&amp;T human, cultural, and natural resources .....</b>  | <b>122</b>           | <b>3.5</b>           |
| Human resources .....                                        | 119                  | 3.1                  |
| Education and training .....                                 | 120                  | 2.6                  |
| Availability of qualified labor .....                        | 43                   | 4.6                  |
| Workforce wellness .....                                     | 119                  | 2.1                  |
| National tourism perception .....                            | 98                   | 4.4                  |
| Natural and cultural resources .....                         | 120                  | 3.0                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               |                                   | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                           | Rank/124 |
|------------------------------------------------------|-----------------------------------|----------|------------------------------------------------------|-----------------------------------------------------------|----------|
| <b>Price competitiveness in the T&amp;T industry</b> |                                   |          | <b>Policy rules and regulations</b>                  |                                                           |          |
| 10.02                                                | Purchasing power parity .....     | 3        | 1.02                                                 | Property rights .....                                     | 119      |
| <b>Human resources</b>                               |                                   |          | 1.04                                                 | Visa requirements .....                                   | 113      |
| 11.06                                                | Hiring and firing practices ..... | 34       | 1.01                                                 | Foreign ownership restrictions .....                      | 107      |
| <b>Natural and cultural resources</b>                |                                   |          | 1.05                                                 | Openness of bilateral Air Service Agreements .....        | 106      |
| 13.02                                                | Carbon dioxide damage .....       | 35       | 1.03                                                 | Rules governing foreign direct investment .....           | 95       |
|                                                      |                                   |          | <b>Environmental regulation</b>                      |                                                           |          |
|                                                      |                                   |          | 2.03                                                 | Government prioritization of sustainable T&T .....        | 118      |
|                                                      |                                   |          | 2.02                                                 | Clarity and stability of environmental regulations .....  | 114      |
|                                                      |                                   |          | 2.01                                                 | Stringency of environmental regulation .....              | 112      |
|                                                      |                                   |          | <b>Safety and security</b>                           |                                                           |          |
|                                                      |                                   |          | 3.01                                                 | Business costs of terrorism .....                         | 111      |
|                                                      |                                   |          | 3.02                                                 | Reliability of police services .....                      | 96       |
|                                                      |                                   |          | 3.03                                                 | Business costs of crime and violence .....                | 90       |
|                                                      |                                   |          | <b>Health and hygiene</b>                            |                                                           |          |
|                                                      |                                   |          | 4.02                                                 | Physician density .....                                   | 119      |
|                                                      |                                   |          | 4.01                                                 | Gov't efforts to reduce health risks from pandemics ..... | 109      |
|                                                      |                                   |          | 4.03                                                 | Access to improved sanitation .....                       | 101      |
|                                                      |                                   |          | 4.04                                                 | Access to improved drinking water .....                   | 86       |
|                                                      |                                   |          | <b>Prioritization of Travel &amp; Tourism</b>        |                                                           |          |
|                                                      |                                   |          | 5.01                                                 | Government prioritization of the T&T industry .....       | 123      |
|                                                      |                                   |          | 5.03                                                 | Effectiveness of marketing and branding .....             | 123      |
|                                                      |                                   |          | 5.04                                                 | T&T fair attendance .....                                 | 117      |
|                                                      |                                   |          | 5.02                                                 | T&T government expenditure .....                          | 109      |
|                                                      |                                   |          | <b>Air transport infrastructure</b>                  |                                                           |          |
|                                                      |                                   |          | 6.06                                                 | International air transport network .....                 | 123      |
|                                                      |                                   |          | 6.02                                                 | Available seat kilometers .....                           | 122      |
|                                                      |                                   |          | 6.01                                                 | Quality of air transport infrastructure .....             | 121      |
|                                                      |                                   |          | 6.05                                                 | Number of operating airlines .....                        | 116      |
|                                                      |                                   |          | 6.04                                                 | Airport density .....                                     | 114      |
|                                                      |                                   |          | 6.03                                                 | Departures per 1,000 population .....                     | 104      |
|                                                      |                                   |          | <b>Ground transport infrastructure</b>               |                                                           |          |
|                                                      |                                   |          | 7.02                                                 | Railroad infrastructure .....                             | 117      |
|                                                      |                                   |          | 7.04                                                 | Domestic transport network .....                          | 116      |
|                                                      |                                   |          | 7.03                                                 | Port infrastructure .....                                 | 107      |
|                                                      |                                   |          | 7.01                                                 | Road infrastructure .....                                 | 106      |
|                                                      |                                   |          | <b>Tourism infrastructure</b>                        |                                                           |          |
|                                                      |                                   |          | 8.02                                                 | Presence of major car rental companies .....              | 113      |
|                                                      |                                   |          | <b>ICT infrastructure</b>                            |                                                           |          |
|                                                      |                                   |          | 9.01                                                 | Extent of business Internet use .....                     | 122      |
|                                                      |                                   |          | 9.03                                                 | Telephone lines .....                                     | 120      |
|                                                      |                                   |          | 9.02                                                 | Internet users .....                                      | 119      |
|                                                      |                                   |          | <b>Price competitiveness in the T&amp;T industry</b> |                                                           |          |
|                                                      |                                   |          | 10.04                                                | Fuel price level .....                                    | 102      |
|                                                      |                                   |          | 10.03                                                | Extent and effect of taxation .....                       | 97       |
|                                                      |                                   |          | 10.01                                                | Ticket taxes and airport charges .....                    | 56       |

(Disadvantages cont'd. from bottom of right column)

&lt;&lt;&lt; (Cont'd. on bottom of left column)

# Cambodia

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 14.1  |
| Surface area (1,000 square kilometers) .....              | 181.0 |
| Gross domestic product (US\$ billions), 2005 .....        | 6.2   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 2,399 |
| Real GDP growth (percent), 2005 .....                     | 13.4  |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

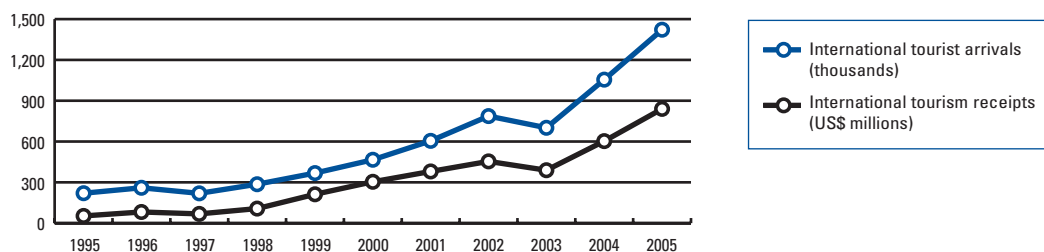
|                               |     | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-----|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 492 | 8.5                 | 7.8                                         |
| Employment (1,000 jobs) ..... | 453 | 6.5                 | 5.1                                         |

### T&T economy, 2006 estimates

|                               |       |      |     |
|-------------------------------|-------|------|-----|
| GDP (US\$ millions) .....     | 1,136 | 19.6 | 7.2 |
| Employment (1,000 jobs) ..... | 1,072 | 15.4 | 4.4 |

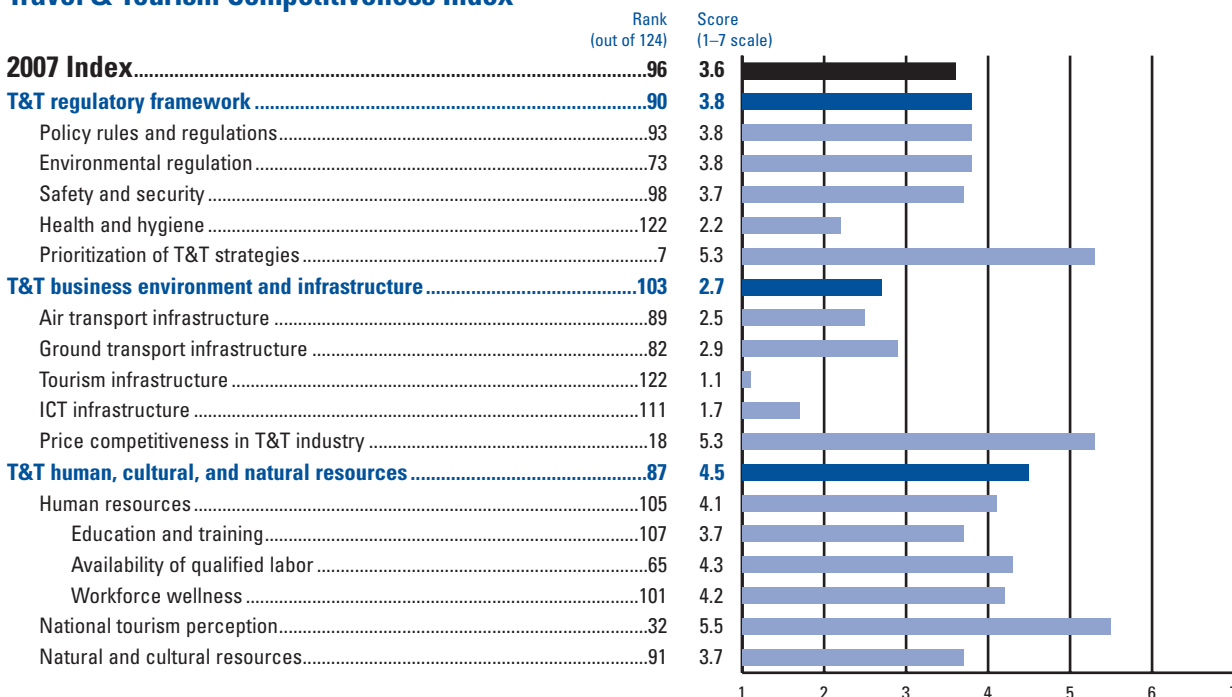
Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 1,422 |
| International tourism receipts (US\$ millions), 2005 ..... | 840   |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index



Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               |                                                     | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                            | Rank/124 |
|------------------------------------------------------|-----------------------------------------------------|----------|------------------------------------------------------|------------------------------------------------------------|----------|
| <b>Environmental regulation</b>                      |                                                     |          | <b>Policy rules and regulations</b>                  |                                                            |          |
| 2.03                                                 | Government prioritization of sustainable T&T .....  | 40       | 1.02                                                 | Property rights .....                                      | 96       |
| <b>Prioritization of Travel &amp; Tourism</b>        |                                                     |          | 1.04                                                 | Visa requirements .....                                    | 94       |
| 5.01                                                 | Government prioritization of the T&T industry ..... | 7        | 1.05                                                 | Openness of bilateral Air Service Agreements .....         | 83       |
| 5.02                                                 | T&T government expenditure .....                    | 11       | 1.01                                                 | Foreign ownership restrictions .....                       | 76       |
| 5.03                                                 | Effectiveness of marketing and branding .....       | 30       | 1.03                                                 | Rules governing foreign direct investment .....            | 62       |
| 5.04                                                 | T&T fair attendance .....                           | 35       | <b>Environmental regulation</b>                      |                                                            |          |
| <b>Price competitiveness in the T&amp;T industry</b> |                                                     |          | 2.01                                                 | Stringency of environmental regulation .....               | 96       |
| 10.02                                                | Purchasing power parity .....                       | 5        | 2.02                                                 | Clarity and stability of environmental regulations .....   | 75       |
| 10.03                                                | Extent and effect of taxation .....                 | 28       | <b>Safety and security</b>                           |                                                            |          |
| 10.04                                                | Fuel price level .....                              | 49       | 3.02                                                 | Reliability of police services .....                       | 100      |
| <b>Human resources</b>                               |                                                     |          | 3.03                                                 | Business costs of crime and violence .....                 | 91       |
| 11.01                                                | Primary education enrollment .....                  | 1        | 3.01                                                 | Business costs of terrorism .....                          | 87       |
| <b>National tourism perception</b>                   |                                                     |          | <b>Health and hygiene</b>                            |                                                            |          |
| 12.01                                                | Tourism openness .....                              | 17       | 4.04                                                 | Access to improved drinking water .....                    | 112      |
| 12.02                                                | Attitude toward tourists .....                      | 32       | 4.03                                                 | Access to improved sanitation .....                        | 109      |
| <b>Natural and cultural resources</b>                |                                                     |          | 4.02                                                 | Physician density .....                                    | 105      |
| 13.02                                                | Carbon dioxide damage .....                         | 4        | 4.01                                                 | Gov't efforts to reduce health risks from pandemics .....  | 76       |
| 13.03                                                | Nationally protected areas .....                    | 19       | <b>Air transport infrastructure</b>                  |                                                            |          |
|                                                      |                                                     |          | 6.04                                                 | Airport density .....                                      | 109      |
|                                                      |                                                     |          | 6.02                                                 | Available seat kilometers .....                            | 89       |
|                                                      |                                                     |          | 6.01                                                 | Quality of air transport infrastructure .....              | 80       |
|                                                      |                                                     |          | 6.06                                                 | International air transport network .....                  | 80       |
|                                                      |                                                     |          | 6.05                                                 | Number of operating airlines .....                         | 69       |
|                                                      |                                                     |          | <b>Ground transport infrastructure</b>               |                                                            |          |
|                                                      |                                                     |          | 7.02                                                 | Railroad infrastructure .....                              | 97       |
|                                                      |                                                     |          | 7.04                                                 | Domestic transport network .....                           | 84       |
|                                                      |                                                     |          | 7.01                                                 | Road infrastructure .....                                  | 77       |
|                                                      |                                                     |          | 7.03                                                 | Port infrastructure .....                                  | 69       |
|                                                      |                                                     |          | <b>Tourism infrastructure</b>                        |                                                            |          |
|                                                      |                                                     |          | 8.02                                                 | Presence of major car rental companies .....               | 121      |
|                                                      |                                                     |          | 8.03                                                 | ATMs accepting Visa cards .....                            | 104      |
|                                                      |                                                     |          | 8.01                                                 | Hotel rooms .....                                          | 91       |
|                                                      |                                                     |          | <b>ICT infrastructure</b>                            |                                                            |          |
|                                                      |                                                     |          | 9.03                                                 | Telephone lines .....                                      | 123      |
|                                                      |                                                     |          | 9.02                                                 | Internet users .....                                       | 120      |
|                                                      |                                                     |          | 9.01                                                 | Extent of business Internet use .....                      | 94       |
|                                                      |                                                     |          | <b>Price competitiveness in the T&amp;T industry</b> |                                                            |          |
|                                                      |                                                     |          | 10.01                                                | Ticket taxes and airport charges .....                     | 64       |
|                                                      |                                                     |          | <b>Human resources</b>                               |                                                            |          |
|                                                      |                                                     |          | 11.10                                                | Tuberculosis incidence .....                               | 123      |
|                                                      |                                                     |          | 11.02                                                | Secondary education enrollment .....                       | 108      |
|                                                      |                                                     |          | 11.08                                                | HIV prevalence .....                                       | 105      |
|                                                      |                                                     |          | 11.11                                                | Life expectancy .....                                      | 104      |
|                                                      |                                                     |          | 11.09                                                | Malaria incidence .....                                    | 102      |
|                                                      |                                                     |          | 11.04                                                | Local availability of research and training services ..... | 95       |
|                                                      |                                                     |          | 11.05                                                | Extent of staff training .....                             | 89       |
|                                                      |                                                     |          | 11.03                                                | Quality of the educational system .....                    | 81       |
|                                                      |                                                     |          | 11.06                                                | Hiring and firing practices .....                          | 68       |
|                                                      |                                                     |          | 11.07                                                | Ease of hiring foreign labor .....                         | 62       |
|                                                      |                                                     |          | <b>National tourism perception</b>                   |                                                            |          |
|                                                      |                                                     |          | 12.03                                                | Recommendation to extend business trips .....              | 51       |
|                                                      |                                                     |          | <b>Natural and cultural resources</b>                |                                                            |          |
|                                                      |                                                     |          | 13.04                                                | Business concern for ecosystems .....                      | 106      |
|                                                      |                                                     |          | 13.05                                                | Risk of malaria and yellow fever .....                     | 103      |
|                                                      |                                                     |          | 13.01                                                | Number of World Heritage sites .....                       | 87       |

# Cameroon

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 16.3  |
| Surface area (1,000 square kilometers) .....              | 475.4 |
| Gross domestic product (US\$ billions), 2005 .....        | 17.0  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 2,421 |
| Real GDP growth (percent), 2005 .....                     | 2.6   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

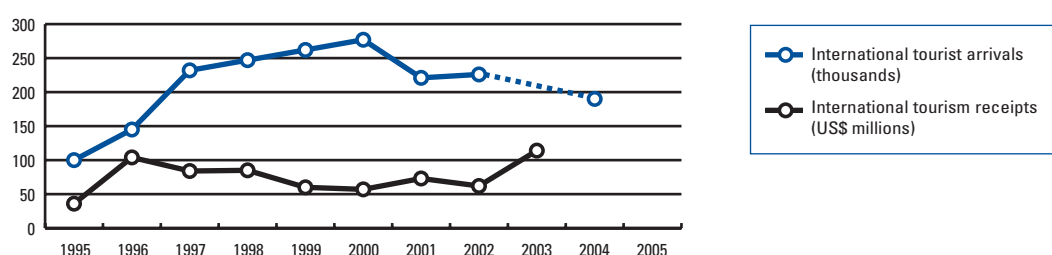
|                               |     | Percent of total | 2007–2016 annual growth (% forecast) |
|-------------------------------|-----|------------------|--------------------------------------|
| GDP (US\$ millions) .....     | 274 | 1.6              | 4.3                                  |
| Employment (1,000 jobs) ..... | 56  | 1.4              | 2.2                                  |

### T&T economy, 2006 estimates

|                               |     |     |     |
|-------------------------------|-----|-----|-----|
| GDP (US\$ millions) .....     | 801 | 4.8 | 4.7 |
| Employment (1,000 jobs) ..... | 163 | 4.0 | 2.7 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2004 .....         | 190 |
| International tourism receipts (US\$ millions), 2003 ..... | 114 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank (out of 124) | Score (1–7 scale) |
|--------------------------------------------------------------|-------------------|-------------------|
| <b>2007 Index</b> .....                                      | <b>118</b>        | <b>3.3</b>        |
| <b>T&amp;T regulatory framework</b> .....                    | <b>119</b>        | <b>3.2</b>        |
| Policy rules and regulations .....                           | 111               | 3.4               |
| Environmental regulation .....                               | 116               | 2.9               |
| Safety and security .....                                    | 89                | 4.0               |
| Health and hygiene .....                                     | 110               | 3.2               |
| Prioritization of T&T strategies .....                       | 119               | 2.3               |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>122</b>        | <b>2.4</b>        |
| Air transport infrastructure .....                           | 120               | 1.8               |
| Ground transport infrastructure .....                        | 113               | 2.2               |
| Tourism infrastructure .....                                 | 89                | 2.3               |
| ICT infrastructure .....                                     | 122               | 1.5               |
| Price competitiveness in T&T industry .....                  | 100               | 4.0               |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>102</b>        | <b>4.2</b>        |
| Human resources .....                                        | 103               | 4.2               |
| Education and training .....                                 | 105               | 3.8               |
| Availability of qualified labor .....                        | 37                | 4.7               |
| Workforce wellness .....                                     | 102               | 4.0               |
| National tourism perception .....                            | 24                | 5.7               |
| Natural and cultural resources .....                         | 123               | 2.8               |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."



## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               |                                    | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                            | Rank/124 |
|------------------------------------------------------|------------------------------------|----------|------------------------------------------------------|------------------------------------------------------------|----------|
| <b>Safety and security</b>                           |                                    |          | <b>Policy rules and regulations</b>                  |                                                            |          |
| 3.01                                                 | Business costs of terrorism .....  | 29       | 1.04                                                 | Visa requirements .....                                    | 113      |
| <b>Price competitiveness in the T&amp;T industry</b> |                                    |          | 1.02                                                 | Property rights .....                                      | 105      |
| 10.02                                                | Purchasing power parity .....      | 45       | 1.03                                                 | Rules governing foreign direct investment .....            | 92       |
| <b>Human resources</b>                               |                                    |          | 1.05                                                 | Openness of bilateral Air Service Agreements .....         | 60       |
| 11.01                                                | Primary education enrollment ..... | 1        | 1.01                                                 | Foreign ownership restrictions .....                       | 58       |
| 11.06                                                | Hiring and firing practices .....  | 37       | <b>Environmental regulation</b>                      |                                                            |          |
| <b>Natural and cultural resources</b>                |                                    |          | 2.01                                                 | Stringency of environmental regulation .....               | 113      |
| 13.02                                                | Carbon dioxide damage .....        | 18       | 2.02                                                 | Clarity and stability of environmental regulations .....   | 112      |
|                                                      |                                    |          | 2.03                                                 | Government prioritization of sustainable T&T .....         | 112      |
|                                                      |                                    |          | <b>Safety and security</b>                           |                                                            |          |
|                                                      |                                    |          | 3.03                                                 | Business costs of crime and violence .....                 | 100      |
|                                                      |                                    |          | 3.02                                                 | Reliability of police services .....                       | 92       |
|                                                      |                                    |          | <b>Health and hygiene</b>                            |                                                            |          |
|                                                      |                                    |          | 4.02                                                 | Physician density .....                                    | 104      |
|                                                      |                                    |          | 4.04                                                 | Access to improved drinking water .....                    | 98       |
|                                                      |                                    |          | 4.01                                                 | Gov't efforts to reduce health risks from pandemics .....  | 88       |
|                                                      |                                    |          | 4.03                                                 | Access to improved sanitation .....                        | 86       |
|                                                      |                                    |          | <b>Prioritization of Travel &amp; Tourism</b>        |                                                            |          |
|                                                      |                                    |          | 5.01                                                 | Government prioritization of the T&T industry .....        | 115      |
|                                                      |                                    |          | 5.03                                                 | Effectiveness of marketing and branding .....              | 114      |
|                                                      |                                    |          | 5.04                                                 | T&T fair attendance .....                                  | 105      |
|                                                      |                                    |          | 5.02                                                 | T&T government expenditure .....                           | 94       |
|                                                      |                                    |          | <b>Air transport infrastructure</b>                  |                                                            |          |
|                                                      |                                    |          | 6.01                                                 | Quality of air transport infrastructure .....              | 122      |
|                                                      |                                    |          | 6.06                                                 | International air transport network .....                  | 116      |
|                                                      |                                    |          | 6.03                                                 | Departures per 1,000 population .....                      | 102      |
|                                                      |                                    |          | 6.04                                                 | Airport density .....                                      | 95       |
|                                                      |                                    |          | 6.02                                                 | Available seat kilometers .....                            | 91       |
|                                                      |                                    |          | 6.05                                                 | Number of operating airlines .....                         | 81       |
|                                                      |                                    |          | <b>Ground transport infrastructure</b>               |                                                            |          |
|                                                      |                                    |          | 7.01                                                 | Road infrastructure .....                                  | 121      |
|                                                      |                                    |          | 7.04                                                 | Domestic transport network .....                           | 114      |
|                                                      |                                    |          | 7.03                                                 | Port infrastructure .....                                  | 103      |
|                                                      |                                    |          | 7.02                                                 | Railroad infrastructure .....                              | 87       |
|                                                      |                                    |          | <b>Tourism infrastructure</b>                        |                                                            |          |
|                                                      |                                    |          | 8.03                                                 | ATMs accepting Visa cards .....                            | 107      |
|                                                      |                                    |          | 8.02                                                 | Presence of major car rental companies .....               | 92       |
|                                                      |                                    |          | <b>ICT infrastructure</b>                            |                                                            |          |
|                                                      |                                    |          | 9.01                                                 | Extent of business Internet use .....                      | 121      |
|                                                      |                                    |          | 9.03                                                 | Telephone lines .....                                      | 117      |
|                                                      |                                    |          | 9.02                                                 | Internet users .....                                       | 108      |
|                                                      |                                    |          | <b>Price competitiveness in the T&amp;T industry</b> |                                                            |          |
|                                                      |                                    |          | 10.03                                                | Extent and effect of taxation .....                        | 113      |
|                                                      |                                    |          | 10.01                                                | Ticket taxes and airport charges .....                     | 108      |
|                                                      |                                    |          | 10.04                                                | Fuel price level .....                                     | 75       |
|                                                      |                                    |          | <b>Human resources</b>                               |                                                            |          |
|                                                      |                                    |          | 11.08                                                | HIV prevalence .....                                       | 115      |
|                                                      |                                    |          | 11.05                                                | Extent of staff training .....                             | 112      |
|                                                      |                                    |          | 11.11                                                | Life expectancy .....                                      | 108      |
|                                                      |                                    |          | 11.09                                                | Malaria incidence .....                                    | 107      |
|                                                      |                                    |          | 11.02                                                | Secondary education enrollment .....                       | 103      |
|                                                      |                                    |          | 11.04                                                | Local availability of research and training services ..... | 97       |
|                                                      |                                    |          | 11.10                                                | Tuberculosis incidence .....                               | 93       |
|                                                      |                                    |          | 11.03                                                | Quality of the educational system .....                    | 88       |
|                                                      |                                    |          | 11.07                                                | Ease of hiring foreign labor .....                         | 55       |

(Disadvantages cont'd. from bottom of right column)

<<< (Cont'd. on bottom of left column)

# Canada

## Key indicators

|                                                           |         |
|-----------------------------------------------------------|---------|
| Population (millions), 2005 .....                         | 32.3    |
| Surface area (1,000 square kilometers) .....              | 9,984.7 |
| Gross domestic product (US\$ billions), 2005 .....        | 1,132.4 |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 34,273  |
| Real GDP growth (percent), 2005 .....                     | 2.9     |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

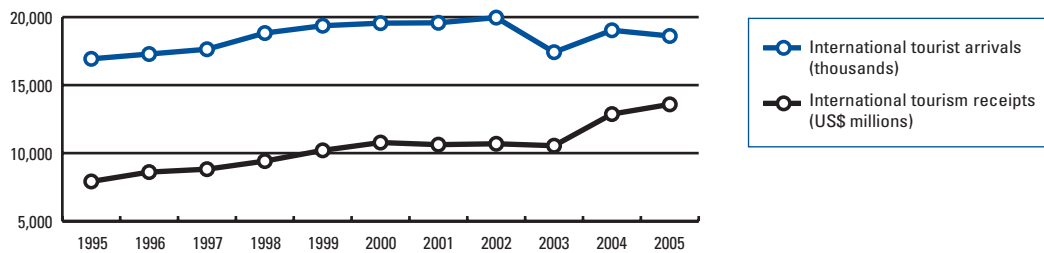
|                               |        | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|--------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 41,458 | 3.5                 | 2.8                                         |
| Employment (1,000 jobs) ..... | 677    | 4.1                 | 0.6                                         |

### T&T economy, 2006 estimates

|                               |         |      |     |
|-------------------------------|---------|------|-----|
| GDP (US\$ millions) .....     | 131,829 | 11.1 | 3.3 |
| Employment (1,000 jobs) ..... | 1,942   | 11.9 | 1.0 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |        |
|------------------------------------------------------------|--------|
| International tourist arrivals (1,000), 2005 .....         | 18,612 |
| International tourism receipts (US\$ millions), 2005 ..... | 13,584 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>7</b>             | <b>5.3</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>15</b>            | <b>5.3</b>           |
| Policy rules and regulations .....                           | 16                   | 5.5                  |
| Environmental regulation .....                               | 19                   | 5.4                  |
| Safety and security .....                                    | 21                   | 5.4                  |
| Health and hygiene .....                                     | 38                   | 5.7                  |
| Prioritization of T&T strategies .....                       | 32                   | 4.6                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>4</b>             | <b>5.2</b>           |
| Air transport infrastructure .....                           | 2                    | 5.7                  |
| Ground transport infrastructure .....                        | 13                   | 5.7                  |
| Tourism infrastructure .....                                 | 16                   | 5.3                  |
| ICT infrastructure .....                                     | 4                    | 5.8                  |
| Price competitiveness in T&T industry .....                  | 110                  | 3.7                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>16</b>            | <b>5.4</b>           |
| Human resources .....                                        | 12                   | 5.7                  |
| Education and training .....                                 | 16                   | 5.9                  |
| Availability of qualified labor .....                        | 67                   | 4.2                  |
| Workforce wellness .....                                     | 9                    | 6.9                  |
| National tourism perception .....                            | 76                   | 4.7                  |
| Natural and cultural resources .....                         | 11                   | 5.9                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                    | Rank/124 | COMPETITIVE DISADVANTAGES                                          | Rank/124 |
|-----------------------------------------------------------|----------|--------------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                       |          | <b>Policy rules and regulations</b>                                |          |
| 1.05 Openness of bilateral Air Service Agreements .....10 |          | 1.03 Rules governing foreign direct investment .....50             |          |
|                                                           |          | 1.04 Visa requirements .....43                                     |          |
| <b>Health and hygiene</b>                                 |          | 1.01 Foreign ownership restrictions .....28                        |          |
| 4.03 Access to improved sanitation .....1                 |          | 1.02 Property rights .....20                                       |          |
| 4.04 Access to improved drinking water .....1             |          |                                                                    |          |
|                                                           |          | <b>Environmental regulation</b>                                    |          |
| <b>Prioritization of Travel &amp; Tourism</b>             |          | 2.03 Government prioritization of sustainable T&T .....26          |          |
| 5.04 T&T fair attendance .....4                           |          | 2.02 Clarity and stability of environmental regulations .....18    |          |
|                                                           |          | 2.01 Stringency of environmental regulation .....15                |          |
| <b>Air transport infrastructure</b>                       |          |                                                                    |          |
| 6.05 Number of operating airlines .....8                  |          | <b>Safety and security</b>                                         |          |
| 6.02 Available seat kilometers .....9                     |          | 3.01 Business costs of terrorism .....74                           |          |
| 6.04 Airport density .....9                               |          | 3.03 Business costs of crime and violence .....29                  |          |
|                                                           |          | 3.02 Reliability of police services .....14                        |          |
| <b>Tourism infrastructure</b>                             |          |                                                                    |          |
| 8.02 Presence of major car rental companies .....1        |          | <b>Health and hygiene</b>                                          |          |
|                                                           |          | 4.02 Physician density .....48                                     |          |
| <b>ICT infrastructure</b>                                 |          | 4.01 Gov't efforts to reduce health risks from pandemics .....41   |          |
| 9.03 Telephone lines .....7                               |          |                                                                    |          |
| 9.01 Extent of business Internet use .....9               |          | <b>Prioritization of Travel &amp; Tourism</b>                      |          |
| 9.02 Internet users .....9                                |          | 5.01 Government prioritization of the T&T industry .....61         |          |
|                                                           |          | 5.03 Effectiveness of marketing and branding .....46               |          |
| <b>Human resources</b>                                    |          | 5.02 T&T government expenditure .....42                            |          |
| 11.01 Primary education enrollment .....1                 |          |                                                                    |          |
| 11.02 Secondary education enrollment .....1               |          | <b>Air transport infrastructure</b>                                |          |
| 11.09 Malaria incidence .....1                            |          | 6.03 Departures per 1,000 population .....31                       |          |
| 11.10 Tuberculosis incidence .....5                       |          | 6.01 Quality of air transport infrastructure .....17               |          |
| 11.11 Life expectancy .....8                              |          | 6.06 International air transport network .....13                   |          |
|                                                           |          |                                                                    |          |
| <b>National tourism perception</b>                        |          | <b>Ground transport infrastructure</b>                             |          |
| 12.02 Attitude toward tourists .....7                     |          | 7.01 Road infrastructure .....16                                   |          |
|                                                           |          | 7.03 Port infrastructure .....16                                   |          |
| <b>Natural and cultural resources</b>                     |          | 7.02 Railroad infrastructure .....14                               |          |
| 13.05 Risk of malaria and yellow fever .....1             |          | 7.04 Domestic transport network .....13                            |          |
|                                                           |          |                                                                    |          |
|                                                           |          | <b>Tourism infrastructure</b>                                      |          |
|                                                           |          | 8.01 Hotel rooms .....16                                           |          |
|                                                           |          | 8.03 ATMs accepting Visa cards .....15                             |          |
|                                                           |          |                                                                    |          |
|                                                           |          | <b>Price competitiveness in the T&amp;T industry</b>               |          |
|                                                           |          | 10.01 Ticket taxes and airport charges .....117                    |          |
|                                                           |          | 10.02 Purchasing power parity .....100                             |          |
|                                                           |          | 10.03 Extent and effect of taxation .....66                        |          |
|                                                           |          | 10.04 Fuel price level .....63                                     |          |
|                                                           |          |                                                                    |          |
|                                                           |          | <b>Human resources</b>                                             |          |
|                                                           |          | 11.07 Ease of hiring foreign labor .....98                         |          |
|                                                           |          | 11.08 HIV prevalence .....62                                       |          |
|                                                           |          | 11.06 Hiring and firing practices .....44                          |          |
|                                                           |          | 11.05 Extent of staff training .....24                             |          |
|                                                           |          | 11.03 Quality of the educational system .....14                    |          |
|                                                           |          | 11.04 Local availability of research and training services .....13 |          |
|                                                           |          |                                                                    |          |
|                                                           |          | <b>National tourism perception</b>                                 |          |
|                                                           |          | 12.01 Tourism openness .....83                                     |          |
|                                                           |          | 12.03 Recommendation to extend business trips .....59              |          |
|                                                           |          |                                                                    |          |
|                                                           |          | <b>Natural and cultural resources</b>                              |          |
|                                                           |          | 13.02 Carbon dioxide damage .....49                                |          |
|                                                           |          | 13.03 Nationally protected areas .....41                           |          |
|                                                           |          | 13.01 Number of World Heritage sites .....15                       |          |
|                                                           |          | 13.04 Business concern for ecosystems .....15                      |          |

# Chad

## Key indicators

|                                                           |         |
|-----------------------------------------------------------|---------|
| Population (millions), 2005 .....                         | 9.7     |
| Surface area (1,000 square kilometers) .....              | 1,284.0 |
| Gross domestic product (US\$ billions), 2005 .....        | 5.9     |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 1,519   |
| Real GDP growth (percent), 2005 .....                     | 12.2    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

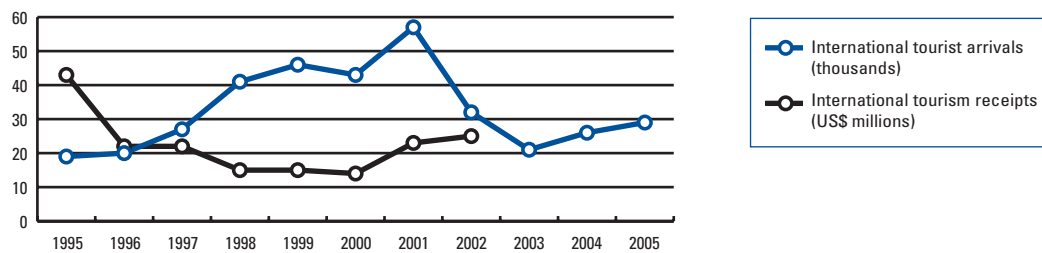
|                               |    | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|----|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 33 | 0.6                 | 8.3                                         |
| Employment (1,000 jobs) ..... | 8  | 0.5                 | 4.1                                         |

### T&T economy, 2006 estimates

|                               |     |     |     |
|-------------------------------|-----|-----|-----|
| GDP (US\$ millions) .....     | 248 | 4.3 | 6.4 |
| Employment (1,000 jobs) ..... | 66  | 3.5 | 2.3 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |    |
|------------------------------------------------------------|----|
| International tourist arrivals (1,000), 2005 .....         | 29 |
| International tourism receipts (US\$ millions), 2002 ..... | 25 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index .....</b>                                      | <b>124</b>           | <b>2.7</b>           |
| <b>T&amp;T regulatory framework .....</b>                    | <b>124</b>           | <b>2.5</b>           |
| Policy rules and regulations .....                           | 123                  | 2.8                  |
| Environmental regulation .....                               | 123                  | 2.6                  |
| Safety and security .....                                    | 120                  | 3.0                  |
| Health and hygiene .....                                     | 123                  | 1.8                  |
| Prioritization of T&T strategies .....                       | 117                  | 2.4                  |
| <b>T&amp;T business environment and infrastructure .....</b> | <b>124</b>           | <b>1.8</b>           |
| Air transport infrastructure .....                           | 124                  | 1.5                  |
| Ground transport infrastructure .....                        | 124                  | 1.6                  |
| Tourism infrastructure .....                                 | 117                  | 1.4                  |
| ICT infrastructure .....                                     | 124                  | 1.3                  |
| Price competitiveness in T&T industry .....                  | 123                  | 3.1                  |
| <b>T&amp;T human, cultural, and natural resources .....</b>  | <b>120</b>           | <b>3.7</b>           |
| Human resources .....                                        | 120                  | 3.0                  |
| Education and training .....                                 | 123                  | 2.3                  |
| Availability of qualified labor .....                        | 105                  | 3.7                  |
| Workforce wellness .....                                     | 111                  | 3.0                  |
| National tourism perception .....                            | 37                   | 5.3                  |
| Natural and cultural resources .....                         | 122                  | 2.8                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               |                                  | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                           | Rank/124 |
|------------------------------------------------------|----------------------------------|----------|------------------------------------------------------|-----------------------------------------------------------|----------|
| <b>Prioritization of Travel &amp; Tourism</b>        |                                  |          | <b>Policy rules and regulations</b>                  |                                                           |          |
| 5.02                                                 | T&T government expenditure ..... | 44       | 1.03                                                 | Rules governing foreign direct investment .....           | 123      |
| <b>Price competitiveness in the T&amp;T industry</b> |                                  |          | 1.02                                                 | Property rights .....                                     | 122      |
| 10.02                                                | Purchasing power parity .....    | 46       | 1.04                                                 | Visa requirements .....                                   | 113      |
| <b>Natural and cultural resources</b>                |                                  |          | 1.01                                                 | Foreign ownership restrictions .....                      | 100      |
| 13.02                                                | Carbon dioxide damage .....      | 1        | 1.05                                                 | Openness of bilateral Air Service Agreements .....        | 67       |
| 13.03                                                | Nationally protected areas ..... | 48       | <b>Environmental regulation</b>                      |                                                           |          |
|                                                      |                                  |          | 2.02                                                 | Clarity and stability of environmental regulations .....  | 124      |
|                                                      |                                  |          | 2.01                                                 | Stringency of environmental regulation .....              | 121      |
|                                                      |                                  |          | 2.03                                                 | Government prioritization of sustainable T&T .....        | 108      |
|                                                      |                                  |          | <b>Safety and security</b>                           |                                                           |          |
|                                                      |                                  |          | 3.02                                                 | Reliability of police services .....                      | 119      |
|                                                      |                                  |          | 3.03                                                 | Business costs of crime and violence .....                | 118      |
|                                                      |                                  |          | 3.01                                                 | Business costs of terrorism .....                         | 100      |
|                                                      |                                  |          | <b>Health and hygiene</b>                            |                                                           |          |
|                                                      |                                  |          | 4.02                                                 | Physician density .....                                   | 117      |
|                                                      |                                  |          | 4.01                                                 | Gov't efforts to reduce health risks from pandemics ..... | 115      |
|                                                      |                                  |          | 4.04                                                 | Access to improved drinking water .....                   | 112      |
|                                                      |                                  |          | 4.03                                                 | Access to improved sanitation .....                       | 111      |
|                                                      |                                  |          | <b>Prioritization of Travel &amp; Tourism</b>        |                                                           |          |
|                                                      |                                  |          | 5.03                                                 | Effectiveness of marketing and branding .....             | 119      |
|                                                      |                                  |          | 5.04                                                 | T&T fair attendance .....                                 | 117      |
|                                                      |                                  |          | 5.01                                                 | Government prioritization of the T&T industry .....       | 116      |
|                                                      |                                  |          | <b>Air transport infrastructure</b>                  |                                                           |          |
|                                                      |                                  |          | 6.01                                                 | Quality of air transport infrastructure .....             | 124      |
|                                                      |                                  |          | 6.06                                                 | International air transport network .....                 | 124      |
|                                                      |                                  |          | 6.05                                                 | Number of operating airlines .....                        | 121      |
|                                                      |                                  |          | 6.02                                                 | Available seat kilometers .....                           | 118      |
|                                                      |                                  |          | 6.03                                                 | Departures per 1,000 population .....                     | 110      |
|                                                      |                                  |          | 6.04                                                 | Airport density .....                                     | 73       |
|                                                      |                                  |          | <b>Ground transport infrastructure</b>               |                                                           |          |
|                                                      |                                  |          | 7.01                                                 | Road infrastructure .....                                 | 124      |
|                                                      |                                  |          | 7.04                                                 | Domestic transport network .....                          | 122      |
|                                                      |                                  |          | 7.03                                                 | Port infrastructure .....                                 | 119      |
|                                                      |                                  |          | 7.02                                                 | Railroad infrastructure .....                             | 106      |
|                                                      |                                  |          | <b>Tourism infrastructure</b>                        |                                                           |          |
|                                                      |                                  |          | 8.02                                                 | Presence of major car rental companies .....              | 113      |
|                                                      |                                  |          | 8.01                                                 | Hotel rooms .....                                         | 112      |
|                                                      |                                  |          | <b>ICT infrastructure</b>                            |                                                           |          |
|                                                      |                                  |          | 9.01                                                 | Extent of business Internet use .....                     | 124      |
|                                                      |                                  |          | 9.03                                                 | Telephone lines .....                                     | 124      |
|                                                      |                                  |          | 9.02                                                 | Internet users .....                                      | 117      |
|                                                      |                                  |          | <b>Price competitiveness in the T&amp;T industry</b> |                                                           |          |
|                                                      |                                  |          | 10.01                                                | Ticket taxes and airport charges .....                    | 123      |
|                                                      |                                  |          | 10.03                                                | Extent and effect of taxation .....                       | 111      |
|                                                      |                                  |          | 10.04                                                | Fuel price level .....                                    | 97       |

(Disadvantages cont'd. from bottom of right column)

&lt;&lt;&lt; (Cont'd. on bottom of left column)

# Chile

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 16.3   |
| Surface area (1,000 square kilometers) .....              | 756.6  |
| Gross domestic product (US\$ billions), 2005 .....        | 115.3  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 11,937 |
| Real GDP growth (percent), 2005 .....                     | 6.3    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

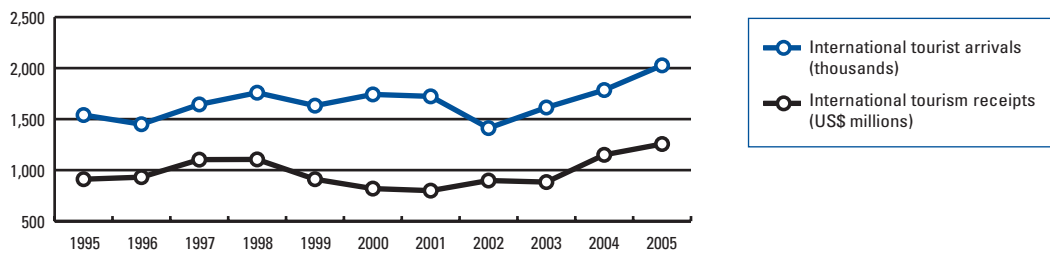
|                               |       | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 2,751 | 2.2                 | 3.2                                         |
| Employment (1,000 jobs) ..... | 148   | 2.5                 | 1.0                                         |

### T&T economy, 2006 estimates

|                               |       |     |     |
|-------------------------------|-------|-----|-----|
| GDP (US\$ millions) .....     | 7,685 | 6.0 | 3.5 |
| Employment (1,000 jobs) ..... | 369   | 6.3 | 1.3 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 2,027 |
| International tourism receipts (US\$ millions), 2005 ..... | 1,256 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>45</b>            | <b>4.6</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>38</b>            | <b>4.8</b>           |
| Policy rules and regulations .....                           | 7                    | 5.7                  |
| Environmental regulation .....                               | 36                   | 4.6                  |
| Safety and security .....                                    | 30                   | 5.2                  |
| Health and hygiene .....                                     | 51                   | 5.0                  |
| Prioritization of T&T strategies .....                       | 73                   | 3.6                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>42</b>            | <b>3.9</b>           |
| Air transport infrastructure .....                           | 41                   | 3.6                  |
| Ground transport infrastructure .....                        | 30                   | 4.6                  |
| Tourism infrastructure .....                                 | 61                   | 3.1                  |
| ICT infrastructure .....                                     | 41                   | 3.5                  |
| Price competitiveness in T&T industry .....                  | 69                   | 4.5                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>47</b>            | <b>5.0</b>           |
| Human resources .....                                        | 24                   | 5.5                  |
| Education and training .....                                 | 41                   | 5.1                  |
| Availability of qualified labor .....                        | 35                   | 4.7                  |
| Workforce wellness .....                                     | 30                   | 6.8                  |
| National tourism perception .....                            | 92                   | 4.4                  |
| Natural and cultural resources .....                         | 32                   | 5.1                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                          | Rank/124 | COMPETITIVE DISADVANTAGES                                      | Rank/124 |
|-----------------------------------------------------------------|----------|----------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                             |          | <b>Environmental regulation</b>                                |          |
| 1.01 Foreign ownership restrictions.....                        | 8        | 2.03 Government prioritization of sustainable T&T .....        | 73       |
| 1.03 Rules governing foreign direct investment .....            | 11       |                                                                |          |
| 1.05 Openness of bilateral Air Service Agreements .....         | 12       | <b>Safety and security</b>                                     |          |
| 1.04 Visa requirements .....                                    | 15       | 3.03 Business costs of crime and violence.....                 | 55       |
| 1.02 Property rights.....                                       | 30       |                                                                |          |
| <b>Environmental regulation</b>                                 |          | <b>Health and hygiene</b>                                      |          |
| 2.01 Stringency of environmental regulation .....               | 27       | 4.02 Physician density.....                                    | 77       |
| 2.02 Clarity and stability of environmental regulations .....   | 37       | 4.01 Gov't efforts to reduce health risks from pandemics ..... | 53       |
|                                                                 |          | 4.03 Access to improved sanitation .....                       | 45       |
| <b>Safety and security</b>                                      |          | 4.04 Access to improved drinking water .....                   | 45       |
| 3.01 Business costs of terrorism .....                          | 20       |                                                                |          |
| 3.02 Reliability of police services .....                       | 31       | <b>Prioritization of Travel &amp; Tourism</b>                  |          |
|                                                                 |          | 5.01 Government prioritization of the T&T industry.....        | 93       |
| <b>Prioritization of Travel &amp; Tourism</b>                   |          | 5.03 Effectiveness of marketing and branding .....             | 77       |
| 5.02 T&T government expenditure .....                           | 39       | 5.04 T&T fair attendance .....                                 | 48       |
|                                                                 |          |                                                                |          |
| <b>Air transport infrastructure</b>                             |          | <b>Air transport infrastructure</b>                            |          |
| 6.06 International air transport network .....                  | 16       | 6.05 Number of operating airlines.....                         | 68       |
| 6.04 Airport density.....                                       | 21       |                                                                |          |
| 6.01 Quality of air transport infrastructure .....              | 29       | <b>Ground transport infrastructure</b>                         |          |
| 6.02 Available seat kilometers.....                             | 38       | 7.02 Railroad infrastructure .....                             | 58       |
| 6.03 Departures per 1,000 population.....                       | 42       |                                                                |          |
|                                                                 |          | <b>Tourism infrastructure</b>                                  |          |
| <b>Ground transport infrastructure</b>                          |          | 8.01 Hotel rooms.....                                          | 58       |
| 7.01 Road infrastructure.....                                   | 23       | 8.02 Presence of major car rental companies.....               | 55       |
| 7.04 Domestic transport network .....                           | 26       | 8.03 ATMs accepting Visa cards .....                           | 52       |
| 7.03 Port infrastructure .....                                  | 31       |                                                                |          |
|                                                                 |          | <b>ICT infrastructure</b>                                      |          |
| <b>ICT infrastructure</b>                                       |          | 9.03 Telephone lines.....                                      | 58       |
| 9.01 Extent of business Internet use .....                      | 26       |                                                                |          |
| 9.02 Internet users .....                                       | 41       | <b>Price competitiveness in the T&amp;T industry</b>           |          |
|                                                                 |          | 10.01 Ticket taxes and airport charges.....                    | 102      |
| <b>Price competitiveness in the T&amp;T industry</b>            |          | 10.02 Purchasing power parity.....                             | 73       |
| 10.03 Extent and effect of taxation.....                        | 30       | 10.04 Fuel price level .....                                   | 56       |
|                                                                 |          |                                                                |          |
| <b>Human resources</b>                                          |          | <b>Human resources</b>                                         |          |
| 11.01 Primary education enrollment .....                        | 1        | 11.03 Quality of the educational system .....                  | 76       |
| 11.07 Ease of hiring foreign labor .....                        | 25       | 11.06 Hiring and firing practices.....                         | 62       |
| 11.10 Tuberculosis incidence .....                              | 29       | 11.08 HIV prevalence .....                                     | 62       |
| 11.11 Life expectancy .....                                     | 29       | 11.02 Secondary education enrollment.....                      | 53       |
| 11.04 Local availability of research and training services..... | 31       |                                                                |          |
| 11.05 Extent of staff training.....                             | 34       | <b>National tourism perception</b>                             |          |
|                                                                 |          | 12.01 Tourism openness .....                                   | 92       |
| <b>Natural and cultural resources</b>                           |          | 12.02 Attitude toward tourists .....                           | 74       |
| 13.03 Nationally protected areas.....                           | 17       | 12.03 Recommendation to extend business trips .....            | 60       |
| 13.04 Business concern for ecosystems .....                     | 23       |                                                                |          |
|                                                                 |          | <b>Natural and cultural resources</b>                          |          |
|                                                                 |          | 13.02 Carbon dioxide damage.....                               | 66       |
|                                                                 |          | 13.01 Number of World Heritage sites .....                     | 48       |



# China

## Key indicators

|                                                           |         |
|-----------------------------------------------------------|---------|
| Population (millions), 2005 .....                         | 1,304.5 |
| Surface area (1,000 square kilometers) .....              | 9,598.1 |
| Gross domestic product (US\$ billions), 2005 .....        | 2,234.1 |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 7,198   |
| Real GDP growth (percent), 2005 .....                     | 10.2    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

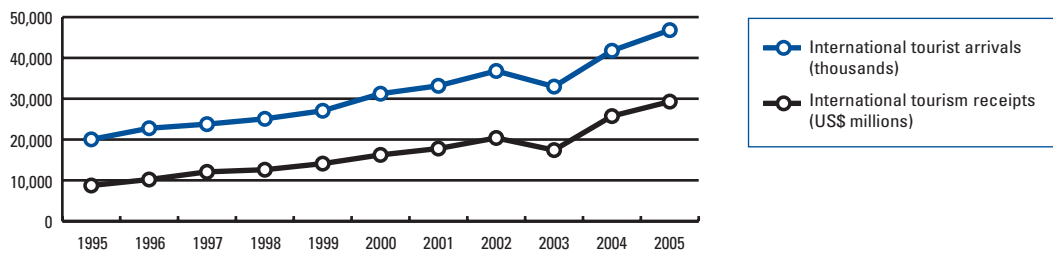
|                               | Percent of total | 2007–2016 annual growth (% forecast) |
|-------------------------------|------------------|--------------------------------------|
| GDP (US\$ millions) .....     | 63,424           | 2.9                                  |
| Employment (1,000 jobs) ..... | 17,383           | 2.3                                  |

### T&T economy, 2006 estimates

|                               |         |      |
|-------------------------------|---------|------|
| GDP (US\$ millions) .....     | 301,154 | 13.7 |
| Employment (1,000 jobs) ..... | 77,600  | 10.2 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |        |
|------------------------------------------------------------|--------|
| International tourist arrivals (1,000), 2005 .....         | 46,809 |
| International tourism receipts (US\$ millions), 2005 ..... | 29,296 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank (out of 124) | Score (1–7 scale) |
|--------------------------------------------------------------|-------------------|-------------------|
| <b>2007 Index</b> .....                                      | <b>71</b>         | <b>4.0</b>        |
| <b>T&amp;T regulatory framework</b> .....                    | <b>78</b>         | <b>4.0</b>        |
| Policy rules and regulations .....                           | 97                | 3.8               |
| Environmental regulation .....                               | 88                | 3.5               |
| Safety and security .....                                    | 83                | 4.1               |
| Health and hygiene .....                                     | 84                | 4.1               |
| Prioritization of T&T strategies .....                       | 33                | 4.5               |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>61</b>         | <b>3.5</b>        |
| Air transport infrastructure .....                           | 36                | 3.8               |
| Ground transport infrastructure .....                        | 45                | 4.0               |
| Tourism infrastructure .....                                 | 113               | 1.7               |
| ICT infrastructure .....                                     | 63                | 2.6               |
| Price competitiveness in T&T industry .....                  | 11                | 5.4               |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>93</b>         | <b>4.4</b>        |
| Human resources .....                                        | 74                | 5.0               |
| Education and training .....                                 | 72                | 4.6               |
| Availability of qualified labor .....                        | 58                | 4.4               |
| Workforce wellness .....                                     | 79                | 6.0               |
| National tourism perception .....                            | 120               | 3.8               |
| Natural and cultural resources .....                         | 60                | 4.4               |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                             | Rank/124 | COMPETITIVE DISADVANTAGES                                       | Rank/124 |
|--------------------------------------------------------------------|----------|-----------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                                |          | <b>Policy rules and regulations</b>                             |          |
| 1.03 Rules governing foreign direct investment .....42             |          | 1.05 Openness of bilateral Air Service Agreements .....105      |          |
|                                                                    |          | 1.04 Visa requirements .....94                                  |          |
| <b>Health and hygiene</b>                                          |          | 1.01 Foreign ownership restrictions .....87                     |          |
| 4.01 Gov't efforts to reduce health risks from pandemics .....24   |          | 1.02 Property rights .....82                                    |          |
|                                                                    |          |                                                                 |          |
| <b>Prioritization of Travel &amp; Tourism</b>                      |          | <b>Environmental regulation</b>                                 |          |
| 5.04 T&T fair attendance .....4                                    |          | 2.01 Stringency of environmental regulation .....97             |          |
| 5.02 T&T government expenditure .....44                            |          | 2.03 Government prioritization of sustainable T&T .....81       |          |
| 5.01 Government prioritization of the T&T industry .....49         |          | 2.02 Clarity and stability of environmental regulations .....76 |          |
|                                                                    |          |                                                                 |          |
| <b>Air transport infrastructure</b>                                |          | <b>Safety and security</b>                                      |          |
| 6.02 Available seat kilometers .....2                              |          | 3.01 Business costs of terrorism .....104                       |          |
| 6.05 Number of operating airlines .....12                          |          | 3.03 Business costs of crime and violence .....70               |          |
|                                                                    |          | 3.02 Reliability of police services .....64                     |          |
|                                                                    |          |                                                                 |          |
| <b>Ground transport infrastructure</b>                             |          | <b>Health and hygiene</b>                                       |          |
| 7.02 Railroad infrastructure .....33                               |          | 4.03 Access to improved sanitation .....94                      |          |
| 7.01 Road infrastructure .....45                                   |          | 4.04 Access to improved drinking water .....89                  |          |
|                                                                    |          | 4.02 Physician density .....79                                  |          |
|                                                                    |          |                                                                 |          |
| <b>Price competitiveness in the T&amp;T industry</b>               |          | <b>Prioritization of Travel &amp; Tourism</b>                   |          |
| 10.02 Purchasing power parity .....15                              |          | 5.03 Effectiveness of marketing and branding .....57            |          |
| 10.01 Ticket taxes and airport charges .....21                     |          |                                                                 |          |
| 10.04 Fuel price level .....27                                     |          |                                                                 |          |
| 10.03 Extent and effect of taxation .....46                        |          |                                                                 |          |
|                                                                    |          |                                                                 |          |
| <b>Human resources</b>                                             |          | <b>Air transport infrastructure</b>                             |          |
| 11.01 Primary education enrollment .....1                          |          | 6.04 Airport density .....121                                   |          |
| 11.08 HIV prevalence .....25                                       |          | 6.01 Quality of air transport infrastructure .....89            |          |
| 11.04 Local availability of research and training services .....46 |          | 6.06 International air transport network .....89                |          |
| 11.06 Hiring and firing practices .....50                          |          | 6.03 Departures per 1,000 population .....84                    |          |
|                                                                    |          |                                                                 |          |
| <b>Natural and cultural resources</b>                              |          | <b>Ground transport infrastructure</b>                          |          |
| 13.01 Number of World Heritage sites .....3                        |          | 7.04 Domestic transport network .....64                         |          |
|                                                                    |          | 7.03 Port infrastructure .....55                                |          |
|                                                                    |          |                                                                 |          |
|                                                                    |          | <b>Tourism infrastructure</b>                                   |          |
|                                                                    |          | 8.02 Presence of major car rental companies .....102            |          |
|                                                                    |          | 8.01 Hotel rooms .....87                                        |          |
|                                                                    |          | 8.03 ATMs accepting Visa cards .....85                          |          |
|                                                                    |          |                                                                 |          |
|                                                                    |          | <b>ICT infrastructure</b>                                       |          |
|                                                                    |          | 9.01 Extent of business Internet use .....75                    |          |
|                                                                    |          | 9.02 Internet users .....75                                     |          |
|                                                                    |          | 9.03 Telephone lines .....52                                    |          |
|                                                                    |          |                                                                 |          |
|                                                                    |          | <b>Human resources</b>                                          |          |
|                                                                    |          | 11.10 Tuberculosis incidence .....92                            |          |
|                                                                    |          | 11.03 Quality of the educational system .....87                 |          |
|                                                                    |          | 11.02 Secondary education enrollment .....83                    |          |
|                                                                    |          | 11.05 Extent of staff training .....76                          |          |
|                                                                    |          | 11.07 Ease of hiring foreign labor .....73                      |          |
|                                                                    |          | 11.11 Life expectancy .....53                                   |          |
|                                                                    |          |                                                                 |          |
|                                                                    |          | <b>National tourism perception</b>                              |          |
|                                                                    |          | 12.03 Recommendation to extend business trips .....122          |          |
|                                                                    |          | 12.02 Attitude toward tourists .....112                         |          |
|                                                                    |          | 12.01 Tourism openness .....78                                  |          |
|                                                                    |          |                                                                 |          |
|                                                                    |          | <b>Natural and cultural resources</b>                           |          |
|                                                                    |          | 13.02 Carbon dioxide damage .....104                            |          |
|                                                                    |          | 13.05 Risk of malaria and yellow fever .....91                  |          |
|                                                                    |          | 13.04 Business concern for ecosystems .....85                   |          |
|                                                                    |          | 13.03 Nationally protected areas .....56                        |          |

# Colombia

## Key indicators

|                                                           |         |
|-----------------------------------------------------------|---------|
| Population (millions), 2005 .....                         | 45.6    |
| Surface area (1,000 square kilometers) .....              | 1,138.9 |
| Gross domestic product (US\$ billions), 2005 .....        | 122.3   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 7,326   |
| Real GDP growth (percent), 2005 .....                     | 5.1     |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

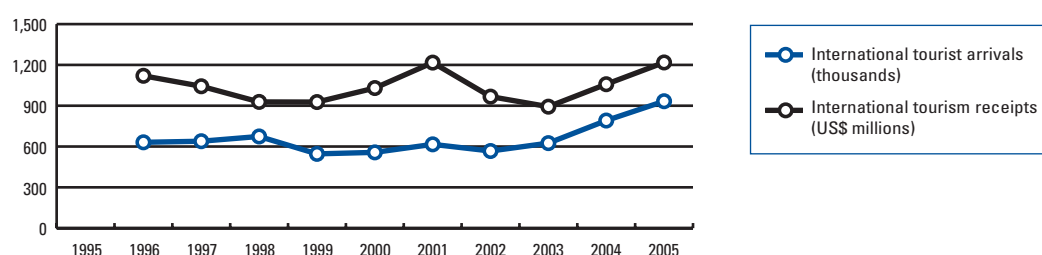
|                               |       | Percent of total | 2007-2016 annual growth (% forecast) |
|-------------------------------|-------|------------------|--------------------------------------|
| GDP (US\$ millions) .....     | 2,793 | 2.1              | 3.4                                  |
| Employment (1,000 jobs) ..... | 374   | 2.0              | 2.2                                  |

### T&T economy, 2006 estimates

|                               |       |     |     |
|-------------------------------|-------|-----|-----|
| GDP (US\$ millions) .....     | 8,129 | 6.2 | 4.3 |
| Employment (1,000 jobs) ..... | 1,038 | 5.5 | 3.0 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 933   |
| International tourism receipts (US\$ millions), 2005 ..... | 1,218 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank (out of 124) | Score (1-7 scale) |
|--------------------------------------------------------------|-------------------|-------------------|
| <b>2007 Index</b> .....                                      | <b>72</b>         | <b>4.0</b>        |
| <b>T&amp;T regulatory framework</b> .....                    | <b>69</b>         | <b>4.1</b>        |
| Policy rules and regulations .....                           | 41                | 5.0               |
| Environmental regulation .....                               | 58                | 4.1               |
| Safety and security .....                                    | 105               | 3.5               |
| Health and hygiene .....                                     | 55                | 4.9               |
| Prioritization of T&T strategies .....                       | 98                | 3.1               |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>77</b>         | <b>3.1</b>        |
| Air transport infrastructure .....                           | 50                | 3.3               |
| Ground transport infrastructure .....                        | 86                | 2.8               |
| Tourism infrastructure .....                                 | 79                | 2.5               |
| ICT infrastructure .....                                     | 67                | 2.5               |
| Price competitiveness in T&T industry .....                  | 71                | 4.5               |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>78</b>         | <b>4.6</b>        |
| Human resources .....                                        | 58                | 5.2               |
| Education and training .....                                 | 66                | 4.6               |
| Availability of qualified labor .....                        | 51                | 4.5               |
| Workforce wellness .....                                     | 63                | 6.4               |
| National tourism perception .....                            | 89                | 4.5               |
| Natural and cultural resources .....                         | 72                | 4.2               |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                  | Rank/124 | COMPETITIVE DISADVANTAGES                                       | Rank/124 |
|---------------------------------------------------------|----------|-----------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                     |          | <b>Policy rules and regulations</b>                             |          |
| 1.04 Visa requirements .....                            | 1        | 1.01 Foreign ownership restrictions.....                        | 67       |
| 1.05 Openness of bilateral Air Service Agreements ..... | 40       | 1.03 Rules governing foreign direct investment .....            | 65       |
| <b>Environmental regulation</b>                         |          | 1.02 Property rights.....                                       | 58       |
| 2.01 Stringency of environmental regulation .....       | 45       | <b>Environmental regulationF</b>                                |          |
| <b>Air transport infrastructure</b>                     |          | 2.03 Government prioritization of sustainable T&T .....         | 74       |
| 6.04 Airport density .....                              | 21       | 2.02 Clarity and stability of environmental regulations .....   | 59       |
| 6.02 Available seat kilometers.....                     | 43       | <b>Safety and security</b>                                      |          |
| 6.03 Departures per 1,000 population.....               | 45       | 3.01 Business costs of terrorism .....                          | 122      |
| 6.05 Number of operating airlines.....                  | 50       | 3.03 Business costs of crime and violence.....                  | 101      |
| 6.06 International air transport network .....          | 50       | 3.02 Reliability of police services .....                       | 53       |
| <b>Price competitiveness in the T&amp;T industry</b>    |          | <b>Health and hygiene</b>                                       |          |
| 10.04 Fuel price level .....                            | 18       | 4.01 Gov't efforts to reduce health risks from pandemics .....  | 66       |
| 10.02 Purchasing power parity .....                     | 37       | 4.02 Physician density .....                                    | 64       |
| <b>Human resources</b>                                  |          | 4.04 Access to improved drinking water .....                    | 53       |
| 11.01 Primary education enrollment .....                | 1        | 4.03 Access to improved sanitation .....                        | 52       |
| 11.07 Ease of hiring foreign labor .....                | 49       | <b>Prioritization of Travel &amp; Tourism</b>                   |          |
| 11.11 Life expectancy .....                             | 49       | 5.02 T&T government expenditure .....                           | 90       |
| <b>Natural and cultural resources</b>                   |          | 5.04 T&T fair attendance .....                                  | 90       |
| 13.01 Number of World Heritage sites .....              | 40       | 5.01 Government prioritization of the T&T industry.....         | 78       |
| 13.03 Nationally protected areas.....                   | 44       | 5.03 Effectiveness of marketing and branding .....              | 67       |
|                                                         |          | <b>Air transport infrastructure</b>                             |          |
|                                                         |          | 6.01 Quality of air transport infrastructure .....              | 53       |
|                                                         |          | <b>Ground transport infrastructure</b>                          |          |
|                                                         |          | 7.02 Railroad infrastructure .....                              | 107      |
|                                                         |          | 7.01 Road infrastructure.....                                   | 87       |
|                                                         |          | 7.03 Port infrastructure .....                                  | 82       |
|                                                         |          | 7.04 Domestic transport network .....                           | 62       |
|                                                         |          | <b>Tourism infrastructure</b>                                   |          |
|                                                         |          | 8.01 Hotel rooms.....                                           | 78       |
|                                                         |          | 8.02 Presence of major car rental companies.....                | 66       |
|                                                         |          | 8.03 ATMs accepting Visa cards .....                            | 59       |
|                                                         |          | <b>ICT infrastructure</b>                                       |          |
|                                                         |          | 9.01 Extent of business Internet use .....                      | 71       |
|                                                         |          | 9.02 Internet users .....                                       | 67       |
|                                                         |          | 9.03 Telephone lines.....                                       | 65       |
|                                                         |          | <b>Price competitiveness in the T&amp;T industry</b>            |          |
|                                                         |          | 10.01 Ticket taxes and airport charges.....                     | 113      |
|                                                         |          | 10.03 Extent and effect of taxation.....                        | 109      |
|                                                         |          | <b>Human resources</b>                                          |          |
|                                                         |          | 11.09 Malaria incidence.....                                    | 99       |
|                                                         |          | 11.08 HIV prevalence .....                                      | 82       |
|                                                         |          | 11.02 Secondary education enrollment.....                       | 79       |
|                                                         |          | 11.04 Local availability of research and training services..... | 70       |
|                                                         |          | 11.05 Extent of staff training.....                             | 67       |
|                                                         |          | 11.10 Tuberculosis incidence .....                              | 62       |
|                                                         |          | 11.06 Hiring and firing practices.....                          | 58       |
|                                                         |          | 11.03 Quality of the educational system .....                   | 56       |
|                                                         |          | <b>National tourism perception</b>                              |          |
|                                                         |          | 12.01 Tourism openness .....                                    | 75       |
|                                                         |          | 12.02 Attitude toward tourists .....                            | 72       |
|                                                         |          | 12.03 Recommendation to extend business trips .....             | 63       |
|                                                         |          | <b>Natural and cultural resources</b>                           |          |
|                                                         |          | 13.05 Risk of malaria and yellow fever .....                    | 97       |
|                                                         |          | 13.04 Business concern for ecosystems .....                     | 66       |
|                                                         |          | 13.02 Carbon dioxide damage.....                                | 64       |

# Costa Rica

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 4.3    |
| Surface area (1,000 square kilometers) .....              | 51.1   |
| Gross domestic product (US\$ billions), 2005 .....        | 20.0   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 10,434 |
| Real GDP growth (percent), 2005 .....                     | 5.9    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

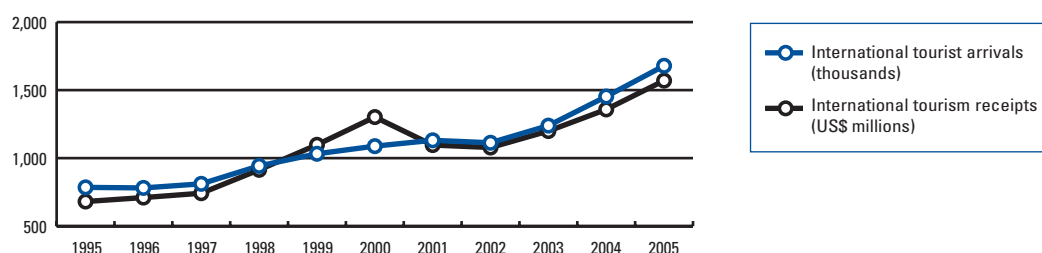
|                               |       | Percent of total | 2007–2016 annual growth (% forecast) |
|-------------------------------|-------|------------------|--------------------------------------|
| GDP (US\$ millions) .....     | 1,375 | 7.1              | 5.0                                  |
| Employment (1,000 jobs) ..... | 120   | 7.3              | 3.5                                  |

### T&T economy, 2006 estimates

|                               |       |      |     |
|-------------------------------|-------|------|-----|
| GDP (US\$ millions) .....     | 3,227 | 16.7 | 4.8 |
| Employment (1,000 jobs) ..... | 268   | 16.4 | 3.4 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 1,679 |
| International tourism receipts (US\$ millions), 2005 ..... | 1,570 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank (out of 124) | Score (1–7 scale) |
|--------------------------------------------------------------|-------------------|-------------------|
| <b>2007 Index .....</b>                                      | <b>41</b>         | <b>4.6</b>        |
| <b>T&amp;T regulatory framework .....</b>                    | <b>39</b>         | <b>4.8</b>        |
| Policy rules and regulations .....                           | 17                | 5.4               |
| Environmental regulation .....                               | 35                | 4.6               |
| Safety and security .....                                    | 67                | 4.4               |
| Health and hygiene .....                                     | 50                | 5.0               |
| Prioritization of T&T strategies .....                       | 34                | 4.5               |
| <b>T&amp;T business environment and infrastructure .....</b> | <b>52</b>         | <b>3.7</b>        |
| Air transport infrastructure .....                           | 44                | 3.5               |
| Ground transport infrastructure .....                        | 93                | 2.6               |
| Tourism infrastructure .....                                 | 36                | 4.1               |
| ICT infrastructure .....                                     | 45                | 3.3               |
| Price competitiveness in T&T industry .....                  | 42                | 4.8               |
| <b>T&amp;T human, cultural, and natural resources .....</b>  | <b>20</b>         | <b>5.3</b>        |
| Human resources .....                                        | 28                | 5.5               |
| Education and training .....                                 | 45                | 5.1               |
| Availability of qualified labor .....                        | 34                | 4.7               |
| Workforce wellness .....                                     | 34                | 6.7               |
| National tourism perception .....                            | 39                | 5.3               |
| Natural and cultural resources .....                         | 28                | 5.2               |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                           | Rank/124 | COMPETITIVE DISADVANTAGES                                      | Rank/124 |
|------------------------------------------------------------------|----------|----------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                              |          | <b>Policy rules and regulations</b>                            |          |
| 1.05 Openness of bilateral Air Service Agreements .....          | 9        | 1.02 Property rights .....                                     | 59       |
| 1.04 Visa requirements .....                                     | 15       | 1.03 Rules governing foreign direct investment .....           | 45       |
| 1.01 Foreign ownership restrictions .....                        | 27       |                                                                |          |
| <b>Environmental regulation</b>                                  |          | <b>Environmental regulation</b>                                |          |
| 2.01 Stringency of environmental regulation .....                | 31       | 2.03 Government prioritization of sustainable T&T .....        | 60       |
|                                                                  |          | 2.02 Clarity and stability of environmental regulations .....  | 41       |
| <b>Safety and security</b>                                       |          | <b>Safety and security</b>                                     |          |
| 3.01 Business costs of terrorism .....                           | 13       | 3.03 Business costs of crime and violence .....                | 93       |
|                                                                  |          | 3.02 Reliability of police services .....                      | 65       |
| <b>Prioritization of Travel &amp; Tourism</b>                    |          | <b>Health and hygiene</b>                                      |          |
| 5.02 T&T government expenditure .....                            | 22       | 4.02 Physician density .....                                   | 68       |
| 5.04 T&T fair attendance .....                                   | 35       | 4.01 Gov't efforts to reduce health risks from pandemics ..... | 67       |
| 5.03 Effectiveness of marketing and branding .....               | 38       | 4.03 Access to improved sanitation .....                       | 45       |
|                                                                  |          | 4.04 Access to improved drinking water .....                   | 42       |
| <b>Air transport infrastructure</b>                              |          | <b>Prioritization of Travel &amp; Tourism</b>                  |          |
| 6.04 Airport density .....                                       | 11       | 5.01 Government prioritization of the T&T industry .....       | 52       |
| 6.03 Departures per 1,000 population .....                       | 38       |                                                                |          |
| <b>Tourism infrastructure</b>                                    |          | <b>Air transport infrastructure</b>                            |          |
| 8.02 Presence of major car rental companies .....                | 1        | 6.05 Number of operating airlines .....                        | 74       |
| 8.01 Hotel rooms .....                                           | 32       | 6.01 Quality of air transport infrastructure .....             | 68       |
|                                                                  |          | 6.02 Available seat kilometers .....                           | 65       |
| <b>ICT infrastructure</b>                                        |          | 6.06 International air transport network .....                 | 46       |
| 9.03 Telephone lines .....                                       | 40       |                                                                |          |
| <b>Price competitiveness in the T&amp;T industry</b>             |          | <b>Ground transport infrastructure</b>                         |          |
| 10.04 Fuel price level .....                                     | 40       | 7.01 Road infrastructure .....                                 | 108      |
|                                                                  |          | 7.02 Railroad infrastructure .....                             | 105      |
| <b>Human resources</b>                                           |          | 7.03 Port infrastructure .....                                 | 102      |
| 11.01 Primary education enrollment .....                         | 1        | 7.04 Domestic transport network .....                          | 61       |
| 11.10 Tuberculosis incidence .....                               | 28       |                                                                |          |
| 11.11 Life expectancy .....                                      | 29       | <b>Tourism infrastructure</b>                                  |          |
| 11.05 Extent of staff training .....                             | 31       | 8.03 ATMs accepting Visa cards .....                           | 60       |
| 11.03 Quality of the educational system .....                    | 40       |                                                                |          |
| 11.04 Local availability of research and training services ..... | 40       | <b>ICT infrastructure</b>                                      |          |
|                                                                  |          | 9.01 Extent of business Internet use .....                     | 63       |
| <b>National tourism perception</b>                               |          | 9.02 Internet users .....                                      | 43       |
| 12.03 Recommendation to extend business trips .....              | 17       |                                                                |          |
| 12.01 Tourism openness .....                                     | 30       | <b>Price competitiveness in the T&amp;T industry</b>           |          |
|                                                                  |          | 10.01 Ticket taxes and airport charges .....                   | 84       |
| <b>Natural and cultural resources</b>                            |          | 10.02 Purchasing power parity .....                            | 52       |
| 13.03 Nationally protected areas .....                           | 12       | 10.03 Extent and effect of taxation .....                      | 47       |
| 13.02 Carbon dioxide damage .....                                | 28       |                                                                |          |
| 13.04 Business concern for ecosystems .....                      | 35       | <b>Human resources</b>                                         |          |
|                                                                  |          | 11.02 Secondary education enrollment .....                     | 80       |
|                                                                  |          | 11.09 Malaria incidence .....                                  | 80       |
|                                                                  |          | 11.08 HIV prevalence .....                                     | 78       |
|                                                                  |          | 11.07 Ease of hiring foreign labor .....                       | 44       |
|                                                                  |          | 11.06 Hiring and firing practices .....                        | 42       |
|                                                                  |          |                                                                |          |
|                                                                  |          | <b>National tourism perception</b>                             |          |
|                                                                  |          | 12.02 Attitude toward tourists .....                           | 44       |
|                                                                  |          |                                                                |          |
|                                                                  |          | <b>Natural and cultural resources</b>                          |          |
|                                                                  |          | 13.01 Number of World Heritage sites .....                     | 60       |

# Croatia

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 4.4    |
| Surface area (1,000 square kilometers) .....              | 56.5   |
| Gross domestic product (US\$ billions), 2005 .....        | 38.5   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 12,325 |
| Real GDP growth (percent), 2005 .....                     | 4.3    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

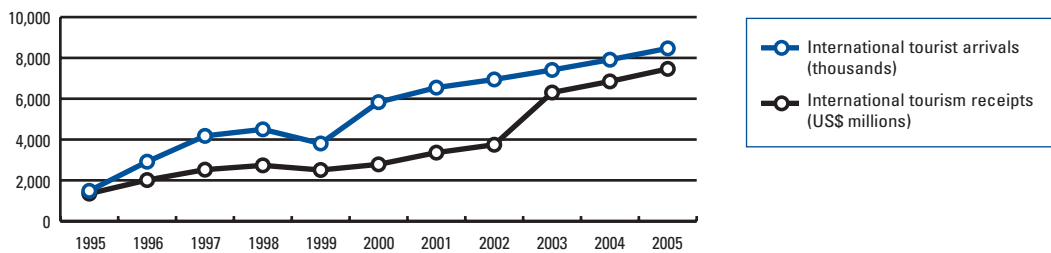
|                               |       | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 3,613 | 9.2                 | 8.2                                         |
| Employment (1,000 jobs) ..... | 121   | 10.6                | 4.5                                         |

### T&T economy, 2006 estimates

|                               |       |      |     |
|-------------------------------|-------|------|-----|
| GDP (US\$ millions) .....     | 7,849 | 20.1 | 8.3 |
| Employment (1,000 jobs) ..... | 262   | 23.1 | 4.7 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 8,467 |
| International tourism receipts (US\$ millions), 2005 ..... | 7,463 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>38</b>            | <b>4.7</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>58</b>            | <b>4.4</b>           |
| Policy rules and regulations .....                           | 72                   | 4.6                  |
| Environmental regulation .....                               | 52                   | 4.3                  |
| Safety and security .....                                    | 63                   | 4.5                  |
| Health and hygiene .....                                     | 66                   | 4.6                  |
| Prioritization of T&T strategies .....                       | 57                   | 3.9                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>40</b>            | <b>4.1</b>           |
| Air transport infrastructure .....                           | 80                   | 2.7                  |
| Ground transport infrastructure .....                        | 46                   | 4.0                  |
| Tourism infrastructure .....                                 | 11                   | 5.7                  |
| ICT infrastructure .....                                     | 34                   | 3.8                  |
| Price competitiveness in T&T industry .....                  | 96                   | 4.1                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>11</b>            | <b>5.5</b>           |
| Human resources .....                                        | 54                   | 5.2                  |
| Education and training .....                                 | 56                   | 4.9                  |
| Availability of qualified labor .....                        | 71                   | 4.2                  |
| Workforce wellness .....                                     | 45                   | 6.6                  |
| National tourism perception .....                            | 4                    | 6.5                  |
| Natural and cultural resources .....                         | 36                   | 4.9                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."



## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                             | Rank/124 | COMPETITIVE DISADVANTAGES                                       | Rank/124 |
|--------------------------------------------------------------------|----------|-----------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                                |          | <b>Policy rules and regulations</b>                             |          |
| 1.04 Visa requirements .....15                                     |          | 1.03 Rules governing foreign direct investment .....94          |          |
|                                                                    |          | 1.02 Property rights .....81                                    |          |
| <b>Safety and security</b>                                         |          | 1.01 Foreign ownership restrictions .....74                     |          |
| 3.01 Business costs of terrorism .....27                           |          | 1.05 Openness of bilateral Air Service Agreements .....45       |          |
|                                                                    |          |                                                                 |          |
| <b>Health and hygiene</b>                                          |          | <b>Environmental regulation</b>                                 |          |
| 4.01 Gov't efforts to reduce health risks from pandemics .....37   |          | 2.02 Clarity and stability of environmental regulations .....52 |          |
|                                                                    |          | 2.03 Government prioritization of sustainable T&T .....52       |          |
| <b>Prioritization of Travel &amp; Tourism</b>                      |          | 2.01 Stringency of environmental regulation .....48             |          |
| 5.04 T&T fair attendance .....35                                   |          |                                                                 |          |
| 5.01 Government prioritization of the T&T industry .....37         |          | <b>Safety and security</b>                                      |          |
| 5.03 Effectiveness of marketing and branding .....37               |          | 3.02 Reliability of police services .....77                     |          |
|                                                                    |          | 3.03 Business costs of crime and violence .....63               |          |
| <b>Ground transport infrastructure</b>                             |          |                                                                 |          |
| 7.01 Road infrastructure .....37                                   |          | <b>Health and hygiene</b>                                       |          |
|                                                                    |          | 4.02 Physician density .....41                                  |          |
| <b>Tourism infrastructure</b>                                      |          |                                                                 |          |
| 8.02 Presence of major car rental companies .....1                 |          | <b>Prioritization of Travel &amp; Tourism</b>                   |          |
| 8.01 Hotel rooms .....9                                            |          | 5.02 T&T government expenditure .....99                         |          |
| 8.03 ATMs accepting Visa cards .....22                             |          |                                                                 |          |
|                                                                    |          | <b>Air transport infrastructure</b>                             |          |
| <b>ICT infrastructure</b>                                          |          | 6.02 Available seat kilometers .....88                          |          |
| 9.03 Telephone lines .....30                                       |          | 6.06 International air transport network .....86                |          |
|                                                                    |          | 6.05 Number of operating airlines .....72                       |          |
| <b>Human resources</b>                                             |          | 6.01 Quality of air transport infrastructure .....70            |          |
| 11.08 HIV prevalence .....1                                        |          | 6.03 Departures per 1,000 population .....49                    |          |
| 11.09 Malaria incidence .....1                                     |          | 6.04 Airport density .....39                                    |          |
| 11.04 Local availability of research and training services .....34 |          |                                                                 |          |
|                                                                    |          | <b>Ground transport infrastructure</b>                          |          |
| <b>National tourism perception</b>                                 |          | 7.03 Port infrastructure .....72                                |          |
| 12.01 Tourism openness .....3                                      |          | 7.02 Railroad infrastructure .....51                            |          |
| 12.03 Recommendation to extend business trips .....26              |          | 7.04 Domestic transport network .....43                         |          |
| 12.02 Attitude toward tourists .....30                             |          |                                                                 |          |
|                                                                    |          | <b>ICT infrastructure</b>                                       |          |
| <b>Natural and cultural resources</b>                              |          | 9.01 Extent of business Internet use .....58                    |          |
| 13.05 Risk of malaria and yellow fever .....1                      |          | 9.02 Internet users .....38                                     |          |
|                                                                    |          |                                                                 |          |
|                                                                    |          | <b>Price competitiveness in the T&amp;T industry</b>            |          |
|                                                                    |          | 10.04 Fuel price level .....108                                 |          |
|                                                                    |          | 10.03 Extent and effect of taxation .....85                     |          |
|                                                                    |          | 10.02 Purchasing power parity .....84                           |          |
|                                                                    |          | 10.01 Ticket taxes and airport charges .....40                  |          |
|                                                                    |          |                                                                 |          |
|                                                                    |          | <b>Human resources</b>                                          |          |
|                                                                    |          | 11.01 Primary education enrollment .....109                     |          |
|                                                                    |          | 11.07 Ease of hiring foreign labor .....89                      |          |
|                                                                    |          | 11.05 Extent of staff training .....61                          |          |
|                                                                    |          | 11.02 Secondary education enrollment .....57                    |          |
|                                                                    |          | 11.10 Tuberculosis incidence .....57                            |          |
|                                                                    |          | 11.06 Hiring and firing practices .....54                       |          |
|                                                                    |          | 11.03 Quality of the educational system .....53                 |          |
|                                                                    |          | 11.11 Life expectancy .....39                                   |          |
|                                                                    |          |                                                                 |          |
|                                                                    |          | <b>Natural and cultural resources</b>                           |          |
|                                                                    |          | 13.02 Carbon dioxide damage .....65                             |          |
|                                                                    |          | 13.03 Nationally protected areas .....58                        |          |
|                                                                    |          | 13.04 Business concern for ecosystems .....51                   |          |
|                                                                    |          | 13.01 Number of World Heritage sites .....40                    |          |

# Cyprus

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 0.8    |
| Surface area (1,000 square kilometers) .....              | 9.3    |
| Gross domestic product (US\$ billions), 2005 .....        | 16.7   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 21,177 |
| Real GDP growth (percent), 2005 .....                     | 3.7    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

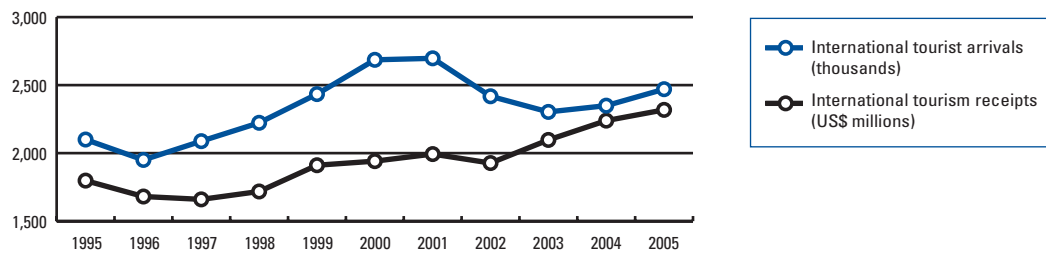
|                               |       | Percent of total | 2007–2016 annual growth (% forecast) |
|-------------------------------|-------|------------------|--------------------------------------|
| GDP (US\$ millions) .....     | 1,844 | 10.7             | 4.6                                  |
| Employment (1,000 jobs) ..... | 57    | 15.0             | 0.9                                  |

### T&T economy, 2006 estimates

|                               |       |      |     |
|-------------------------------|-------|------|-----|
| GDP (US\$ millions) .....     | 4,021 | 23.3 | 4.4 |
| Employment (1,000 jobs) ..... | 113   | 29.7 | 0.8 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 2,470 |
| International tourism receipts (US\$ millions), 2005 ..... | 2,318 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank (out of 124) | Score (1–7 scale) |
|--------------------------------------------------------------|-------------------|-------------------|
| <b>2007 Index</b> .....                                      | <b>20</b>         | <b>5.1</b>        |
| <b>T&amp;T regulatory framework</b> .....                    | <b>29</b>         | <b>5.1</b>        |
| Policy rules and regulations .....                           | 49                | 4.9               |
| Environmental regulation .....                               | 53                | 4.3               |
| Safety and security .....                                    | 34                | 5.2               |
| Health and hygiene .....                                     | 36                | 5.7               |
| Prioritization of T&T strategies .....                       | 4                 | 5.5               |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>23</b>         | <b>4.5</b>        |
| Air transport infrastructure .....                           | 34                | 3.8               |
| Ground transport infrastructure .....                        | 51                | 3.8               |
| Tourism infrastructure .....                                 | 5                 | 6.1               |
| ICT infrastructure .....                                     | 31                | 4.3               |
| Price competitiveness in T&T industry .....                  | 72                | 4.5               |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>3</b>          | <b>5.6</b>        |
| Human resources .....                                        | 49                | 5.2               |
| Education and training .....                                 | 42                | 5.1               |
| Availability of qualified labor .....                        | 101               | 3.7               |
| Workforce wellness .....                                     | 10                | 6.9               |
| National tourism perception .....                            | 5                 | 6.5               |
| Natural and cultural resources .....                         | 31                | 5.1               |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               |                                                     | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                           | Rank/124 |
|------------------------------------------------------|-----------------------------------------------------|----------|------------------------------------------------------|-----------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                  |                                                     |          | <b>Policy rules and regulations</b>                  |                                                           |          |
| 1.04                                                 | Visa requirements .....                             | 1        | 1.05                                                 | Openness of bilateral Air Service Agreements .....        | 111      |
| <b>Health and hygiene</b>                            |                                                     |          | 1.01                                                 | Foreign ownership restrictions.....                       | 80       |
| 4.03                                                 | Access to improved sanitation .....                 | 1        | 1.03                                                 | Rules governing foreign direct investment .....           | 57       |
| 4.04                                                 | Access to improved drinking water .....             | 1        | 1.02                                                 | Property rights .....                                     | 29       |
| <b>Prioritization of Travel &amp; Tourism</b>        |                                                     |          | <b>Environmental regulation</b>                      |                                                           |          |
| 5.01                                                 | Government prioritization of the T&T industry ..... | 3        | 2.01                                                 | Stringency of environmental regulation .....              | 59       |
| 5.02                                                 | T&T government expenditure .....                    | 10       | 2.02                                                 | Clarity and stability of environmental regulations .....  | 57       |
| 5.03                                                 | Effectiveness of marketing and branding .....       | 18       | 2.03                                                 | Government prioritization of sustainable T&T .....        | 25       |
| <b>Air transport infrastructure</b>                  |                                                     |          | <b>Safety and security</b>                           |                                                           |          |
| 6.03                                                 | Departures per 1,000 population.....                | 19       | 3.01                                                 | Business costs of terrorism .....                         | 69       |
| <b>Tourism infrastructure</b>                        |                                                     |          | 3.02                                                 | Reliability of police services .....                      | 37       |
| 8.01                                                 | Hotel rooms.....                                    | 1        | 3.03                                                 | Business costs of crime and violence.....                 | 25       |
| 8.02                                                 | Presence of major car rental companies.....         | 1        | <b>Health and hygiene</b>                            |                                                           |          |
| 8.03                                                 | ATMs accepting Visa cards .....                     | 18       | 4.01                                                 | Gov't efforts to reduce health risks from pandemics ..... | 51       |
| <b>ICT infrastructure</b>                            |                                                     |          | 4.02                                                 | Physician density .....                                   | 43       |
| 9.03                                                 | Telephone lines.....                                | 16       | <b>Prioritization of Travel &amp; Tourism</b>        |                                                           |          |
| <b>Price competitiveness in the T&amp;T industry</b> |                                                     |          | 5.04                                                 | T&T fair attendance .....                                 | 35       |
| 10.03                                                | Extent and effect of taxation.....                  | 19       | <b>Air transport infrastructure</b>                  |                                                           |          |
| <b>Human resources</b>                               |                                                     |          | 6.02                                                 | Available seat kilometers.....                            | 62       |
| 11.08                                                | HIV prevalence .....                                | 1        | 6.01                                                 | Quality of air transport infrastructure .....             | 52       |
| 11.09                                                | Malaria incidence.....                              | 1        | 6.06                                                 | International air transport network .....                 | 48       |
| 11.10                                                | Tuberculosis incidence .....                        | 6        | 6.05                                                 | Number of operating airlines.....                         | 38       |
| 11.11                                                | Life expectancy .....                               | 15       | 6.04                                                 | Airport density .....                                     | 26       |
| <b>National tourism perception</b>                   |                                                     |          | <b>Ground transport infrastructure</b>               |                                                           |          |
| 12.01                                                | Tourism openness .....                              | 2        | 7.02                                                 | Railroad infrastructure .....                             | 124      |
| 12.02                                                | Attitude toward tourists .....                      | 16       | 7.04                                                 | Domestic transport network .....                          | 75       |
| <b>Natural and cultural resources</b>                |                                                     |          | 7.03                                                 | Port infrastructure .....                                 | 32       |
| 13.05                                                | Risk of malaria and yellow fever .....              | 1        | 7.01                                                 | Road infrastructure.....                                  | 22       |
|                                                      |                                                     |          | <b>ICT infrastructure</b>                            |                                                           |          |
|                                                      |                                                     |          | 9.01                                                 | Extent of business Internet use .....                     | 47       |
|                                                      |                                                     |          | 9.02                                                 | Internet users .....                                      | 33       |
|                                                      |                                                     |          | <b>Price competitiveness in the T&amp;T industry</b> |                                                           |          |
|                                                      |                                                     |          | 10.02                                                | Purchasing power parity.....                              | 98       |
|                                                      |                                                     |          | 10.04                                                | Fuel price level .....                                    | 88       |
|                                                      |                                                     |          | 10.01                                                | Ticket taxes and airport charges.....                     | 22       |
|                                                      |                                                     |          | <b>Human resources</b>                               |                                                           |          |
|                                                      |                                                     |          | 11.01                                                | Primary education enrollment .....                        | 96       |
|                                                      |                                                     |          | 11.06                                                | Hiring and firing practices.....                          | 94       |
|                                                      |                                                     |          | 11.07                                                | Ease of hiring foreign labor .....                        | 93       |
|                                                      |                                                     |          | 11.05                                                | Extent of staff training.....                             | 70       |
|                                                      |                                                     |          | 11.04                                                | Local availability of research and training services..... | 65       |
|                                                      |                                                     |          | 11.02                                                | Secondary education enrollment.....                       | 32       |
|                                                      |                                                     |          | 11.03                                                | Quality of the educational system .....                   | 26       |
|                                                      |                                                     |          | <b>National tourism perception</b>                   |                                                           |          |
|                                                      |                                                     |          | 12.03                                                | Recommendation to extend business trips .....             | 45       |
|                                                      |                                                     |          | <b>Natural and cultural resources</b>                |                                                           |          |
|                                                      |                                                     |          | 13.01                                                | Number of World Heritage sites .....                      | 60       |
|                                                      |                                                     |          | 13.04                                                | Business concern for ecosystems .....                     | 47       |
|                                                      |                                                     |          | 13.02                                                | Carbon dioxide damage.....                                | 40       |

# Czech Republic

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 10.2   |
| Surface area (1,000 square kilometers) .....              | 78.9   |
| Gross domestic product (US\$ billions), 2005 .....        | 124.3  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 18,341 |
| Real GDP growth (percent), 2005 .....                     | 6.1    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

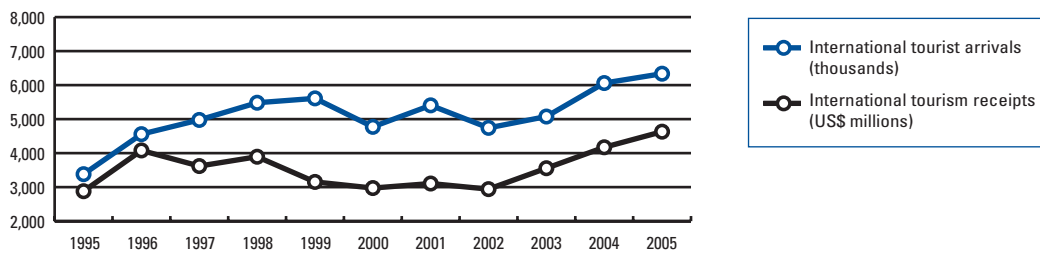
|                               |       | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 2,775 | 2.2                 | 4.3                                         |
| Employment (1,000 jobs) ..... | 109   | 2.3                 | 0.2                                         |

### T&T economy, 2006 estimates

|                               |        |      |     |
|-------------------------------|--------|------|-----|
| GDP (US\$ millions) .....     | 17,490 | 13.6 | 5.2 |
| Employment (1,000 jobs) ..... | 601    | 12.6 | 1.0 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 6,336 |
| International tourism receipts (US\$ millions), 2005 ..... | 4,631 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>35</b>            | <b>4.8</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>40</b>            | <b>4.8</b>           |
| Policy rules and regulations .....                           | 32                   | 5.2                  |
| Environmental regulation .....                               | 31                   | 4.8                  |
| Safety and security .....                                    | 52                   | 4.7                  |
| Health and hygiene .....                                     | 44                   | 5.3                  |
| Prioritization of T&T strategies .....                       | 52                   | 4.0                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>37</b>            | <b>4.1</b>           |
| Air transport infrastructure .....                           | 48                   | 3.4                  |
| Ground transport infrastructure .....                        | 38                   | 4.3                  |
| Tourism infrastructure .....                                 | 23                   | 4.5                  |
| ICT infrastructure .....                                     | 26                   | 4.5                  |
| Price competitiveness in T&T industry .....                  | 101                  | 4.0                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>22</b>            | <b>5.3</b>           |
| Human resources .....                                        | 26                   | 5.5                  |
| Education and training .....                                 | 23                   | 5.6                  |
| Availability of qualified labor .....                        | 78                   | 4.1                  |
| Workforce wellness .....                                     | 28                   | 6.8                  |
| National tourism perception .....                            | 77                   | 4.6                  |
| Natural and cultural resources .....                         | 12                   | 5.8                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                            | Rank/124 | COMPETITIVE DISADVANTAGES                                        | Rank/124 |
|-------------------------------------------------------------------|----------|------------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                               |          | <b>Policy rules and regulations</b>                              |          |
| 1.01 Foreign ownership restrictions.....6                         |          | 1.02 Property rights.....64                                      |          |
| 1.03 Rules governing foreign direct investment.....10             |          | 1.04 Visa requirements .....43                                   |          |
| 1.05 Openness of bilateral Air Service Agreements .....31         |          |                                                                  |          |
| <b>Environmental regulation</b>                                   |          | <b>Environmental regulation</b>                                  |          |
| 2.01 Stringency of environmental regulation .....19               |          | 2.03 Government prioritization of sustainable T&T .....68        |          |
|                                                                   |          | 2.02 Clarity and stability of environmental regulations .....35  |          |
| <b>Safety and security</b>                                        |          | <b>Safety and security</b>                                       |          |
| 3.01 Business costs of terrorism .....28                          |          | 3.02 Reliability of police services .....73                      |          |
|                                                                   |          | 3.03 Business costs of crime and violence.....49                 |          |
| <b>Health and hygiene</b>                                         |          | <b>Health and hygiene</b>                                        |          |
| 4.02 Physician density.....16                                     |          | 4.01 Gov't efforts to reduce health risks from pandemics .....35 |          |
| <b>Prioritization of Travel &amp; Tourism</b>                     |          | <b>Prioritization of Travel &amp; Tourism</b>                    |          |
| 5.04 T&T fair attendance .....15                                  |          | 5.01 Government prioritization of the T&T industry .....95       |          |
|                                                                   |          | 5.03 Effectiveness of marketing and branding .....79             |          |
| <b>Air transport infrastructure</b>                               |          | 5.02 T&T government expenditure .....49                          |          |
| 6.05 Number of operating airlines.....30                          |          |                                                                  |          |
| 6.06 International air transport network .....33                  |          | <b>Air transport infrastructure</b>                              |          |
|                                                                   |          | 6.02 Available seat kilometers.....53                            |          |
| <b>Ground transport infrastructure</b>                            |          | 6.03 Departures per 1,000 population.....48                      |          |
| 7.04 Domestic transport network .....22                           |          | 6.01 Quality of air transport infrastructure .....45             |          |
| 7.02 Railroad infrastructure .....27                              |          | 6.04 Airport density .....45                                     |          |
| <b>Tourism infrastructure</b>                                     |          | <b>Ground transport infrastructure</b>                           |          |
| 8.02 Presence of major car rental companies.....1                 |          | 7.03 Port infrastructure .....67                                 |          |
| 8.01 Hotel rooms.....28                                           |          | 7.01 Road infrastructure.....50                                  |          |
| <b>ICT infrastructure</b>                                         |          | <b>Tourism infrastructure</b>                                    |          |
| 9.01 Extent of business Internet use .....20                      |          | 8.03 ATMs accepting Visa cards .....38                           |          |
| 9.02 Internet users .....20                                       |          |                                                                  |          |
| <b>Human resources</b>                                            |          | <b>ICT infrastructure</b>                                        |          |
| 11.01 Primary education enrollment .....1                         |          | 9.03 Telephone lines.....37                                      |          |
| 11.09 Malaria incidence.....1                                     |          |                                                                  |          |
| 11.04 Local availability of research and training services.....20 |          | <b>Price competitiveness in the T&amp;T industry</b>             |          |
| 11.08 HIV prevalence .....25                                      |          | 10.04 Fuel price level .....100                                  |          |
| 11.10 Tuberculosis incidence .....25                              |          | 10.03 Extent and effect of taxation.....89                       |          |
| 11.05 Extent of staff training.....29                             |          | 10.02 Purchasing power parity.....80                             |          |
| 11.03 Quality of the educational system .....30                   |          | 10.01 Ticket taxes and airport charges.....67                    |          |
| 11.07 Ease of hiring foreign labor .....30                        |          |                                                                  |          |
| <b>Natural and cultural resources</b>                             |          | <b>Human resources</b>                                           |          |
| 13.05 Risk of malaria and yellow fever .....1                     |          | 11.06 Hiring and firing practices.....102                        |          |
| 13.01 Number of World Heritage sites .....19                      |          | 11.02 Secondary education enrollment.....39                      |          |
| 13.03 Nationally protected areas.....24                           |          | 11.11 Life expectancy .....36                                    |          |
| 13.04 Business concern for ecosystems .....25                     |          | <b>National tourism perception</b>                               |          |
|                                                                   |          | 12.02 Attitude toward tourists .....108                          |          |
|                                                                   |          | 12.01 Tourism openness .....50                                   |          |
|                                                                   |          | 12.03 Recommendation to extend business trips .....48            |          |
|                                                                   |          | <b>Natural and cultural resources</b>                            |          |
|                                                                   |          | 13.02 Carbon dioxide damage.....86                               |          |

# Denmark

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 5.4    |
| Surface area (1,000 square kilometers) .....              | 43.1   |
| Gross domestic product (US\$ billions), 2005 .....        | 259.6  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 34,740 |
| Real GDP growth (percent), 2005 .....                     | 3.2    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

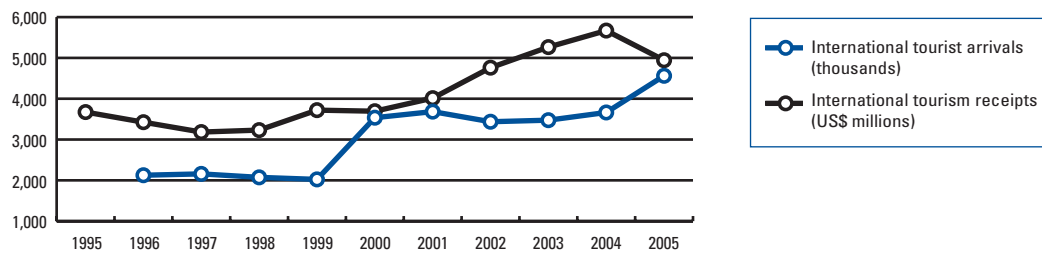
|                               |       | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 8,151 | 3.0                 | 1.5                                         |
| Employment (1,000 jobs) ..... | 83    | 3.0                 | -0.9                                        |

### T&T economy, 2006 estimates

|                               |        |     |      |
|-------------------------------|--------|-----|------|
| GDP (US\$ millions) .....     | 21,476 | 8.0 | 1.4  |
| Employment (1,000 jobs) ..... | 223    | 8.1 | -1.1 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 4,562 |
| International tourism receipts (US\$ millions), 2005 ..... | 4,943 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index .....</b>                                      | <b>11</b>            | <b>5.3</b>           |
| <b>T&amp;T regulatory framework .....</b>                    | <b>8</b>             | <b>5.5</b>           |
| Policy rules and regulations .....                           | 10                   | 5.6                  |
| Environmental regulation .....                               | 1                    | 6.1                  |
| Safety and security .....                                    | 8                    | 6.0                  |
| Health and hygiene .....                                     | 16                   | 6.1                  |
| Prioritization of T&T strategies .....                       | 80                   | 3.5                  |
| <b>T&amp;T business environment and infrastructure .....</b> | <b>16</b>            | <b>4.8</b>           |
| Air transport infrastructure .....                           | 17                   | 4.6                  |
| Ground transport infrastructure .....                        | 7                    | 6.2                  |
| Tourism infrastructure .....                                 | 22                   | 4.6                  |
| ICT infrastructure .....                                     | 10                   | 5.4                  |
| Price competitiveness in T&T industry .....                  | 124                  | 2.9                  |
| <b>T&amp;T human, cultural, and natural resources .....</b>  | <b>9</b>             | <b>5.6</b>           |
| Human resources .....                                        | 4                    | 6.1                  |
| Education and training .....                                 | 3                    | 6.2                  |
| Availability of qualified labor .....                        | 15                   | 5.2                  |
| Workforce wellness .....                                     | 22                   | 6.8                  |
| National tourism perception .....                            | 69                   | 4.7                  |
| Natural and cultural resources .....                         | 7                    | 6.0                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                           | Rank/124 | COMPETITIVE DISADVANTAGES                                         | Rank/124 |
|------------------------------------------------------------------|----------|-------------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                              |          | <b>Policy rules and regulations</b>                               |          |
| 1.02 Property rights.....3                                       |          | 1.04 Visa requirements .....43                                    |          |
|                                                                  |          | 1.03 Rules governing foreign direct investment .....18            |          |
| <b>Environmental regulation</b>                                  |          | 1.05 Openness of bilateral Air Service Agreements .....17         |          |
| 2.02 Clarity and stability of environmental regulations .....1   |          | 1.01 Foreign ownership restrictions.....15                        |          |
| 2.01 Stringency of environmental regulation .....2               |          |                                                                   |          |
|                                                                  |          | <b>Environmental regulation</b>                                   |          |
| <b>Safety and security</b>                                       |          | 2.03 Government prioritization of sustainable T&T .....22         |          |
| 3.02 Reliability of police services .....3                       |          |                                                                   |          |
| 3.03 Business costs of crime and violence.....5                  |          | <b>Safety and security</b>                                        |          |
|                                                                  |          | 3.01 Business costs of terrorism .....75                          |          |
| <b>Health and hygiene</b>                                        |          |                                                                   |          |
| 4.03 Access to improved sanitation .....1                        |          | <b>Health and hygiene</b>                                         |          |
| 4.04 Access to improved drinking water .....1                    |          | 4.02 Physician density .....32                                    |          |
| 4.01 Gov't efforts to reduce health risks from pandemics .....10 |          |                                                                   |          |
|                                                                  |          | <b>Prioritization of Travel &amp; Tourism</b>                     |          |
| <b>Air transport infrastructure</b>                              |          | 5.04 T&T fair attendance .....90                                  |          |
| 6.06 International air transport network .....8                  |          | 5.02 T&T government expenditure .....73                           |          |
| 6.01 Quality of air transport infrastructure .....9              |          | 5.01 Government prioritization of the T&T industry .....66        |          |
|                                                                  |          | 5.03 Effectiveness of marketing and branding .....41              |          |
| <b>Ground transport infrastructure</b>                           |          |                                                                   |          |
| 7.01 Road infrastructure .....5                                  |          | <b>Air transport infrastructure</b>                               |          |
| 7.03 Port infrastructure .....6                                  |          | 6.02 Available seat kilometers.....33                             |          |
| 7.04 Domestic transport network .....7                           |          | 6.04 Airport density .....33                                      |          |
| 7.02 Railroad infrastructure .....8                              |          | 6.05 Number of operating airlines.....19                          |          |
|                                                                  |          | 6.03 Departures per 1,000 population.....14                       |          |
| <b>ICT infrastructure</b>                                        |          |                                                                   |          |
| 9.03 Telephone lines.....6                                       |          | <b>Tourism infrastructure</b>                                     |          |
| 9.01 Extent of business Internet use .....10                     |          | 8.02 Presence of major car rental companies.....35                |          |
|                                                                  |          | 8.01 Hotel rooms.....34                                           |          |
| <b>Human resources</b>                                           |          | 8.03 ATMs accepting Visa cards .....17                            |          |
| 11.01 Primary education enrollment .....1                        |          |                                                                   |          |
| 11.02 Secondary education enrollment.....1                       |          | <b>ICT infrastructure</b>                                         |          |
| 11.09 Malaria incidence.....1                                    |          | 9.02 Internet users .....17                                       |          |
| 11.05 Extent of staff training.....2                             |          |                                                                   |          |
| 11.03 Quality of the educational system .....5                   |          | <b>Price competitiveness in the T&amp;T industry</b>              |          |
| 11.06 Hiring and firing practices.....8                          |          | 10.04 Fuel price level .....119                                   |          |
|                                                                  |          | 10.02 Purchasing power parity.....117                             |          |
| <b>Natural and cultural resources</b>                            |          | 10.03 Extent and effect of taxation.....116                       |          |
| 13.05 Risk of malaria and yellow fever .....1                    |          | 10.01 Ticket taxes and airport charges.....68                     |          |
| 13.03 Nationally protected areas.....3                           |          |                                                                   |          |
| 13.02 Carbon dioxide damage.....8                                |          | <b>Human resources</b>                                            |          |
|                                                                  |          | 11.07 Ease of hiring foreign labor .....52                        |          |
|                                                                  |          | 11.08 HIV prevalence .....48                                      |          |
|                                                                  |          | 11.11 Life expectancy .....24                                     |          |
|                                                                  |          | 11.10 Tuberculosis incidence .....12                              |          |
|                                                                  |          | 11.04 Local availability of research and training services.....11 |          |
|                                                                  |          |                                                                   |          |
|                                                                  |          | <b>National tourism perception</b>                                |          |
|                                                                  |          | 12.03 Recommendation to extend business trips .....114            |          |
|                                                                  |          | 12.02 Attitude toward tourists .....52                            |          |
|                                                                  |          | 12.01 Tourism openness .....31                                    |          |
|                                                                  |          |                                                                   |          |
|                                                                  |          | <b>Natural and cultural resources</b>                             |          |
|                                                                  |          | 13.01 Number of World Heritage sites .....55                      |          |
|                                                                  |          | 13.04 Business concern for ecosystems .....12                     |          |



# Dominican Republic

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 8.9   |
| Surface area (1,000 square kilometers) .....              | 48.7  |
| Gross domestic product (US\$ billions), 2005 .....        | 29.1  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 7,627 |
| Real GDP growth (percent), 2005 .....                     | 9.3   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

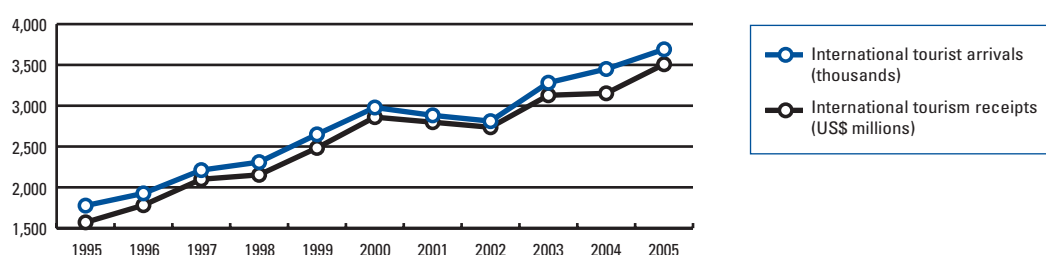
|                               |       | Percent<br>of total | 2007–2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 2,090 | 6.6                 | 4.4                                         |
| Employment (1,000 jobs) ..... | 208   | 5.8                 | 4.4                                         |

### T&T economy, 2006 estimates

|                               |       |      |     |
|-------------------------------|-------|------|-----|
| GDP (US\$ millions) .....     | 6,705 | 21.3 | 4.1 |
| Employment (1,000 jobs) ..... | 656   | 18.4 | 4.1 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 3,691 |
| International tourism receipts (US\$ millions), 2005 ..... | 3,508 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1–7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index .....</b>                                      | <b>50</b>            | <b>4.3</b>           |
| <b>T&amp;T regulatory framework .....</b>                    | <b>51</b>            | <b>4.5</b>           |
| Policy rules and regulations .....                           | 14                   | 5.5                  |
| Environmental regulation .....                               | 72                   | 3.8                  |
| Safety and security .....                                    | 87                   | 4.1                  |
| Health and hygiene .....                                     | 79                   | 4.2                  |
| Prioritization of T&T strategies .....                       | 18                   | 5.0                  |
| <b>T&amp;T business environment and infrastructure .....</b> | <b>71</b>            | <b>3.3</b>           |
| Air transport infrastructure .....                           | 63                   | 3.0                  |
| Ground transport infrastructure .....                        | 71                   | 3.2                  |
| Tourism infrastructure .....                                 | 39                   | 3.9                  |
| ICT infrastructure .....                                     | 79                   | 2.3                  |
| Price competitiveness in T&T industry .....                  | 104                  | 3.9                  |
| <b>T&amp;T human, cultural, and natural resources .....</b>  | <b>29</b>            | <b>5.2</b>           |
| Human resources .....                                        | 57                   | 5.2                  |
| Education and training .....                                 | 91                   | 4.1                  |
| Availability of qualified labor .....                        | 8                    | 5.5                  |
| Workforce wellness .....                                     | 82                   | 6.0                  |
| National tourism perception .....                            | 21                   | 5.9                  |
| Natural and cultural resources .....                         | 45                   | 4.6                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

# Dominican Republic

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                   | Rank/124 | COMPETITIVE DISADVANTAGES                                        | Rank/124 |
|----------------------------------------------------------|----------|------------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                      |          | <b>Policy rules and regulations</b>                              |          |
| 1.05 Openness of bilateral Air Service Agreements .....  | 4        | 1.02 Property rights .....                                       | 75       |
| 1.01 Foreign ownership restrictions .....                | 29       | <b>Environmental regulation</b>                                  |          |
| 1.03 Rules governing foreign direct investment .....     | 29       | 2.02 Clarity and stability of environmental regulations .....    | 74       |
| 1.04 Visa requirements .....                             | 43       | 2.01 Stringency of environmental regulation .....                | 70       |
| <b>Safety and security</b>                               |          | 2.03 Government prioritization of sustainable T&T .....          | 66       |
| 3.01 Business costs of terrorism .....                   | 10       | <b>Safety and security</b>                                       |          |
| <b>Health and hygiene</b>                                |          | 3.02 Reliability of police services .....                        | 103      |
| 4.04 Access to improved drinking water .....             | 49       | 3.03 Business costs of crime and violence .....                  | 99       |
| <b>Prioritization of Travel &amp; Tourism</b>            |          | <b>Health and hygiene</b>                                        |          |
| 5.02 T&T government expenditure .....                    | 1        | 4.01 Gov't efforts to reduce health risks from pandemics .....   | 123      |
| 5.01 Government prioritization of the T&T industry ..... | 32       | 4.03 Access to improved sanitation .....                         | 78       |
| 5.03 Effectiveness of marketing and branding .....       | 45       | 4.02 Physician density .....                                     | 57       |
| 5.04 T&T fair attendance .....                           | 48       | <b>Air transport infrastructure</b>                              |          |
| <b>Air transport infrastructure</b>                      |          | 6.03 Departures per 1,000 population .....                       | 114      |
| 6.06 International air transport network .....           | 29       | 6.04 Airport density .....                                       | 86       |
| 6.01 Quality of air transport infrastructure .....       | 34       | <b>Ground transport infrastructure</b>                           |          |
| 6.05 Number of operating airlines .....                  | 44       | 7.02 Railroad infrastructure .....                               | 116      |
| 6.02 Available seat kilometers .....                     | 48       | 7.04 Domestic transport network .....                            | 80       |
| <b>Tourism infrastructure</b>                            |          | 7.03 Port infrastructure .....                                   | 54       |
| 8.02 Presence of major car rental companies .....        | 1        | 7.01 Road infrastructure .....                                   | 51       |
| 8.01 Hotel rooms .....                                   | 37       | <b>Tourism infrastructure</b>                                    |          |
| <b>Price competitiveness in the T&amp;T industry</b>     |          | 8.03 ATMs accepting Visa cards .....                             | 62       |
| 10.04 Fuel price level .....                             | 49       | <b>ICT infrastructure</b>                                        |          |
| <b>Human resources</b>                                   |          | 9.03 Telephone lines .....                                       | 81       |
| 11.01 Primary education enrollment .....                 | 1        | 9.01 Extent of business Internet use .....                       | 76       |
| 11.06 Hiring and firing practices .....                  | 10       | 9.02 Internet users .....                                        | 66       |
| 11.07 Ease of hiring foreign labor .....                 | 10       | <b>Price competitiveness in the T&amp;T industry</b>             |          |
| <b>National tourism perception</b>                       |          | 10.01 Ticket taxes and airport charges .....                     | 122      |
| 12.02 Attitude toward tourists .....                     | 8        | 10.03 Extent and effect of taxation .....                        | 92       |
| 12.01 Tourism openness .....                             | 12       | 10.02 Purchasing power parity .....                              | 55       |
| 12.03 Recommendation to extend business trips .....      | 42       | <b>Human resources</b>                                           |          |
| <b>Natural and cultural resources</b>                    |          | 11.03 Quality of the educational system .....                    | 117      |
| 13.03 Nationally protected areas .....                   | 2        | 11.08 HIV prevalence .....                                       | 98       |
|                                                          |          | 11.05 Extent of staff training .....                             | 90       |
|                                                          |          | 11.04 Local availability of research and training services ..... | 89       |
|                                                          |          | 11.02 Secondary education enrollment .....                       | 87       |
|                                                          |          | 11.11 Life expectancy .....                                      | 83       |
|                                                          |          | 11.09 Malaria incidence .....                                    | 78       |
|                                                          |          | 11.10 Tuberculosis incidence .....                               | 76       |
|                                                          |          | <b>Natural and cultural resources</b>                            |          |
|                                                          |          | 13.02 Carbon dioxide damage .....                                | 90       |
|                                                          |          | 13.04 Business concern for ecosystems .....                      | 88       |
|                                                          |          | 13.01 Number of World Heritage sites .....                       | 87       |

# Ecuador

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 13.2  |
| Surface area (1,000 square kilometers) .....              | 283.6 |
| Gross domestic product (US\$ billions), 2005 .....        | 36.5  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 4,316 |
| Real GDP growth (percent), 2005 .....                     | 4.7   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

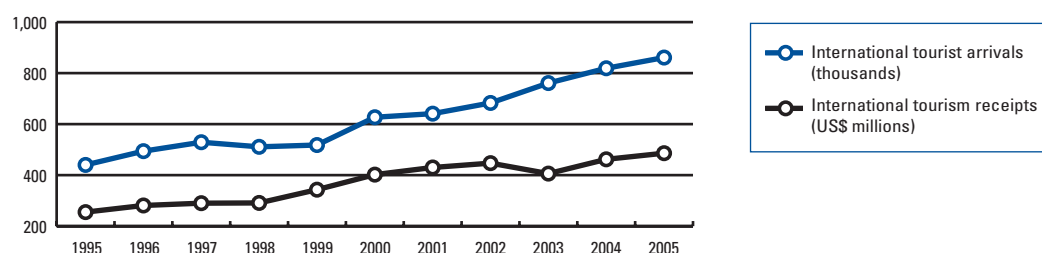
|                               |     | Percent of total | 2007-2016 annual growth (% forecast) |
|-------------------------------|-----|------------------|--------------------------------------|
| GDP (US\$ millions) .....     | 632 | 1.9              | 4.3                                  |
| Employment (1,000 jobs) ..... | 85  | 1.6              | 3.7                                  |

### T&T economy, 2006 estimates

|                               |       |     |     |
|-------------------------------|-------|-----|-----|
| GDP (US\$ millions) .....     | 2,696 | 7.9 | 3.7 |
| Employment (1,000 jobs) ..... | 348   | 6.8 | 3.0 |

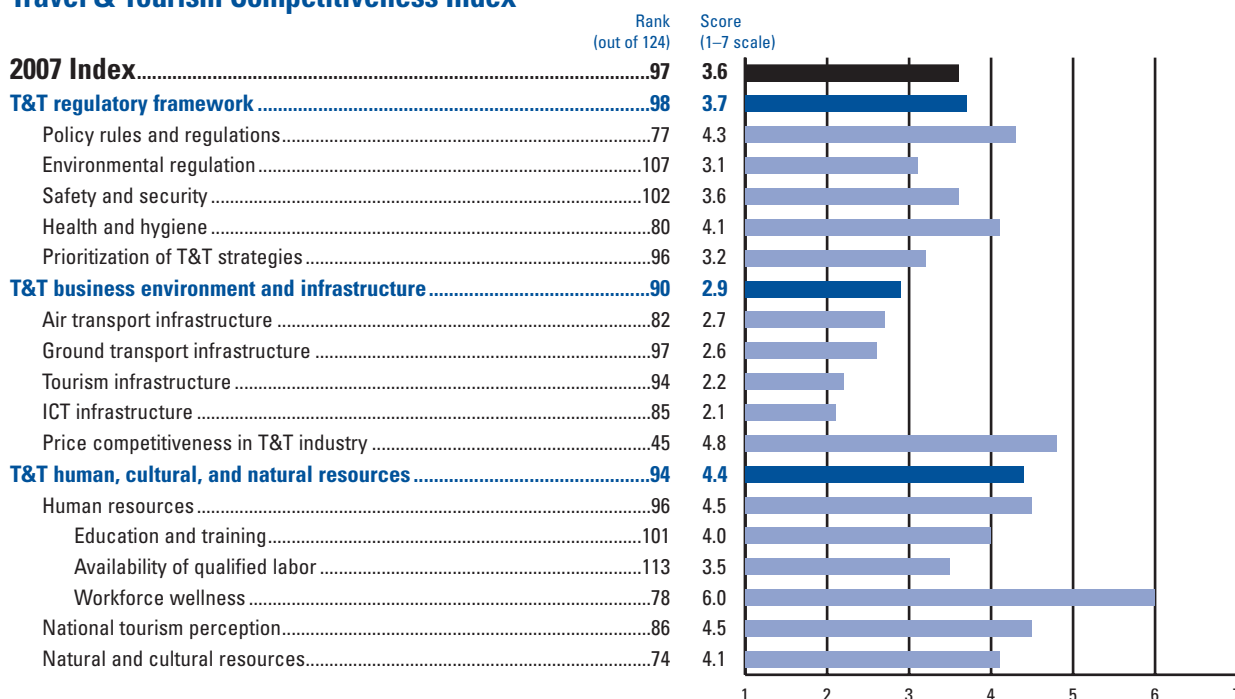
Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2005 .....         | 861 |
| International tourism receipts (US\$ millions), 2005 ..... | 486 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index



Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                  | Rank/124 | COMPETITIVE DISADVANTAGES                                       | Rank/124 |
|---------------------------------------------------------|----------|-----------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                     |          | <b>Policy rules and regulations</b>                             |          |
| 1.04 Visa requirements .....                            | 1        | 1.03 Rules governing foreign direct investment .....            | 116      |
| 1.05 Openness of bilateral Air Service Agreements ..... | 33       | 1.01 Foreign ownership restrictions.....                        | 112      |
| <b>Prioritization of Travel &amp; Tourism</b>           |          | 1.02 Property rights.....                                       | 110      |
| 5.04 T&T fair attendance .....                          | 48       | <b>Environmental regulation</b>                                 |          |
| 5.02 T&T government expenditure .....                   | 49       | 2.02 Clarity and stability of environmental regulations .....   | 111      |
| <b>Air transport infrastructure</b>                     |          | 2.03 Government prioritization of sustainable T&T .....         | 109      |
| 6.04 Airport density .....                              | 38       | 2.01 Stringency of environmental regulation .....               | 93       |
| <b>Price competitiveness in the T&amp;T industry</b>    |          | <b>Safety and security</b>                                      |          |
| 10.04 Fuel price level .....                            | 12       | 3.02 Reliability of police services .....                       | 110      |
| <b>Human resources</b>                                  |          | 3.03 Business costs of crime and violence.....                  | 110      |
| 11.01 Primary education enrollment .....                | 1        | 3.01 Business costs of terrorism .....                          | 58       |
| <b>Natural and cultural resources</b>                   |          | <b>Health and hygiene</b>                                       |          |
| 13.03 Nationally protected areas.....                   | 21       | 4.01 Gov't efforts to reduce health risks from pandemics .....  | 124      |
|                                                         |          | 4.04 Access to improved drinking water .....                    | 67       |
|                                                         |          | 4.02 Physician density.....                                     | 62       |
|                                                         |          | 4.03 Access to improved sanitation .....                        | 62       |
|                                                         |          | <b>Prioritization of Travel &amp; Tourism</b>                   |          |
|                                                         |          | 5.01 Government prioritization of the T&T industry .....        | 113      |
|                                                         |          | 5.03 Effectiveness of marketing and branding .....              | 103      |
|                                                         |          | <b>Air transport infrastructure</b>                             |          |
|                                                         |          | 6.06 International air transport network .....                  | 84       |
|                                                         |          | 6.01 Quality of air transport infrastructure .....              | 71       |
|                                                         |          | 6.05 Number of operating airlines.....                          | 71       |
|                                                         |          | 6.03 Departures per 1,000 population.....                       | 69       |
|                                                         |          | 6.02 Available seat kilometers.....                             | 60       |
|                                                         |          | <b>Ground transport infrastructure</b>                          |          |
|                                                         |          | 7.02 Railroad infrastructure .....                              | 120      |
|                                                         |          | 7.04 Domestic transport network .....                           | 100      |
|                                                         |          | 7.03 Port infrastructure .....                                  | 84       |
|                                                         |          | 7.01 Road infrastructure.....                                   | 82       |
|                                                         |          | <b>Tourism infrastructure</b>                                   |          |
|                                                         |          | 8.02 Presence of major car rental companies.....                | 92       |
|                                                         |          | 8.03 ATMs accepting Visa cards .....                            | 89       |
|                                                         |          | 8.01 Hotel rooms.....                                           | 60       |
|                                                         |          | <b>ICT infrastructure</b>                                       |          |
|                                                         |          | 9.01 Extent of business Internet use .....                      | 90       |
|                                                         |          | 9.02 Internet users .....                                       | 86       |
|                                                         |          | 9.03 Telephone lines.....                                       | 76       |
|                                                         |          | <b>Price competitiveness in the T&amp;T industry</b>            |          |
|                                                         |          | 10.01 Ticket taxes and airport charges.....                     | 91       |
|                                                         |          | 10.03 Extent and effect of taxation.....                        | 81       |
|                                                         |          | 10.02 Purchasing power parity.....                              | 72       |
|                                                         |          | <b>Human resources</b>                                          |          |
|                                                         |          | 11.03 Quality of the educational system .....                   | 119      |
|                                                         |          | 11.06 Hiring and firing practices.....                          | 105      |
|                                                         |          | 11.07 Ease of hiring foreign labor .....                        | 105      |
|                                                         |          | 11.05 Extent of staff training.....                             | 104      |
|                                                         |          | 11.09 Malaria incidence.....                                    | 96       |
|                                                         |          | 11.02 Secondary education enrollment.....                       | 93       |
|                                                         |          | 11.04 Local availability of research and training services..... | 90       |
|                                                         |          | 11.10 Tuberculosis incidence .....                              | 87       |
|                                                         |          | 11.08 HIV prevalence .....                                      | 62       |
|                                                         |          | 11.11 Life expectancy .....                                     | 53       |

(Disadvantages cont'd. from bottom of right column)

| COMPETITIVE DISADVANTAGES                           | Rank/124 |
|-----------------------------------------------------|----------|
| <b>National tourism perception</b>                  |          |
| 12.02 Attitude toward tourists .....                | 92       |
| 12.03 Recommendation to extend business trips ..... | 64       |
| 12.01 Tourism openness .....                        | 60       |
| <b>Natural and cultural resources</b>               |          |
| 13.05 Risk of malaria and yellow fever .....        | 98       |
| 13.04 Business concern for ecosystems .....         | 96       |
| 13.02 Carbon dioxide damage.....                    | 74       |
| 13.01 Number of World Heritage sites .....          | 55       |

&lt;&lt;&lt; (Cont'd. on bottom of left column)

# Egypt

## Key indicators

|                                                           |         |
|-----------------------------------------------------------|---------|
| Population (millions), 2005 .....                         | 74.0    |
| Surface area (1,000 square kilometers) .....              | 1,001.5 |
| Gross domestic product (US\$ billions), 2005 .....        | 89.5    |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 4,317   |
| Real GDP growth (percent), 2005 .....                     | 4.9     |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

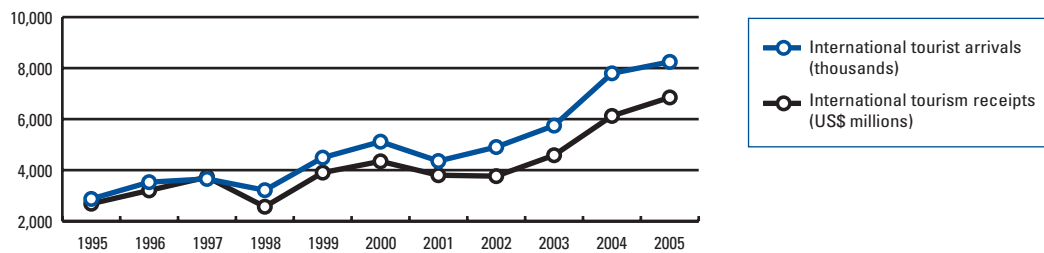
|                               |       | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 8,374 | 7.9                 | 5.0                                         |
| Employment (1,000 jobs) ..... | 1,313 | 6.7                 | 1.8                                         |

### T&T economy, 2006 estimates

|                               |        |      |     |
|-------------------------------|--------|------|-----|
| GDP (US\$ millions) .....     | 15,850 | 15.0 | 5.7 |
| Employment (1,000 jobs) ..... | 2,472  | 12.6 | 2.4 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 8,244 |
| International tourism receipts (US\$ millions), 2005 ..... | 6,851 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>58</b>            | <b>4.2</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>50</b>            | <b>4.5</b>           |
| Policy rules and regulations .....                           | 69                   | 4.6                  |
| Environmental regulation .....                               | 75                   | 3.8                  |
| Safety and security .....                                    | 64                   | 4.5                  |
| Health and hygiene .....                                     | 69                   | 4.5                  |
| Prioritization of T&T strategies .....                       | 12                   | 5.2                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>60</b>            | <b>3.5</b>           |
| Air transport infrastructure .....                           | 49                   | 3.3                  |
| Ground transport infrastructure .....                        | 58                   | 3.7                  |
| Tourism infrastructure .....                                 | 85                   | 2.4                  |
| ICT infrastructure .....                                     | 74                   | 2.4                  |
| Price competitiveness in T&T industry .....                  | 5                    | 5.7                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>68</b>            | <b>4.7</b>           |
| Human resources .....                                        | 69                   | 5.1                  |
| Education and training .....                                 | 76                   | 4.5                  |
| Availability of qualified labor .....                        | 70                   | 4.2                  |
| Workforce wellness .....                                     | 61                   | 6.4                  |
| National tourism perception .....                            | 85                   | 4.6                  |
| Natural and cultural resources .....                         | 55                   | 4.5                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                  | Rank/124 | COMPETITIVE DISADVANTAGES                                       | Rank/124 |
|---------------------------------------------------------|----------|-----------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                     |          | <b>Policy rules and regulations</b>                             |          |
| 1.04 Visa requirements .....                            | 15       | 1.03 Rules governing foreign direct investment .....            | 96       |
| <b>Environmental regulation</b>                         |          | 1.01 Foreign ownership restrictions.....                        | 85       |
| 2.03 Government prioritization of sustainable T&T ..... | 36       | 1.05 Openness of bilateral Air Service Agreements .....         | 64       |
| <b>Safety and security</b>                              |          | 1.02 Property rights.....                                       | 57       |
| 3.02 Reliability of police services .....               | 45       | <b>Environmental regulation</b>                                 |          |
| 3.03 Business costs of crime and violence.....          | 48       | 2.02 Clarity and stability of environmental regulations .....   | 93       |
| <b>Health and hygiene</b>                               |          | 2.01 Stringency of environmental regulation .....               | 92       |
| 4.04 Access to improved drinking water .....            | 38       | <b>Safety and security</b>                                      |          |
| <b>Prioritization of Travel &amp; Tourism</b>           |          | 3.01 Business costs of terrorism .....                          | 102      |
| 5.04 T&T fair attendance.....                           | 4        | <b>Health and hygiene</b>                                       |          |
| 5.02 T&T government expenditure .....                   | 19       | 4.02 Physician density .....                                    | 91       |
| 5.01 Government prioritization of the T&T industry..... | 30       | 4.03 Access to improved sanitation .....                        | 66       |
| 5.03 Effectiveness of marketing and branding .....      | 36       | 4.01 Gov't efforts to reduce health risks from pandemics .....  | 59       |
| <b>Air transport infrastructure</b>                     |          | <b>Air transport infrastructure</b>                             |          |
| 6.05 Number of operating airlines .....                 | 26       | 6.04 Airport density .....                                      | 111      |
| 6.02 Available seat kilometers.....                     | 35       | 6.06 International air transport network .....                  | 68       |
| <b>Ground transport infrastructure</b>                  |          | 6.01 Quality of air transport infrastructure .....              | 56       |
| 7.04 Domestic transport network .....                   | 44       | <b>Ground transport infrastructure</b>                          |          |
| 7.02 Railroad infrastructure .....                      | 47       | 7.01 Road infrastructure .....                                  | 64       |
| <b>Price competitiveness in the T&amp;T industry</b>    |          | 7.03 Port infrastructure .....                                  | 61       |
| 10.04 Fuel price level .....                            | 2        | <b>Tourism infrastructure</b>                                   |          |
| 10.02 Purchasing power parity .....                     | 28       | 8.03 ATMs accepting Visa cards .....                            | 87       |
| 10.01 Ticket taxes and airport charges.....             | 30       | 8.01 Hotel rooms.....                                           | 70       |
| 10.03 Extent and effect of taxation.....                | 36       | 8.02 Presence of major car rental companies.....                | 66       |
| <b>Human resources</b>                                  |          | <b>ICT infrastructure</b>                                       |          |
| 11.01 Primary education enrollment .....                | 1        | 9.02 Internet users .....                                       | 82       |
| 11.08 HIV prevalence .....                              | 1        | 9.03 Telephone lines.....                                       | 69       |
| 11.09 Malaria incidence.....                            | 1        | 9.01 Extent of business Internet use .....                      | 65       |
| 11.07 Ease of hiring foreign labor .....                | 27       | <b>Human resources</b>                                          |          |
| 11.10 Tuberculosis incidence .....                      | 43       | 11.03 Quality of the educational system .....                   | 104      |
| <b>National tourism perception</b>                      |          | 11.06 Hiring and firing practices.....                          | 97       |
| 12.01 Tourism openness .....                            | 46       | 11.05 Extent of staff training.....                             | 83       |
| <b>Natural and cultural resources</b>                   |          | 11.04 Local availability of research and training services..... | 79       |
| 13.01 Number of World Heritage sites .....              | 30       | 11.11 Life expectancy .....                                     | 79       |
| 13.03 Nationally protected areas .....                  | 46       | 11.02 Secondary education enrollment.....                       | 60       |
|                                                         |          | <b>National tourism perception</b>                              |          |
|                                                         |          | 12.02 Attitude toward tourists .....                            | 106      |
|                                                         |          | 12.03 Recommendation to extend business trips .....             | 79       |
|                                                         |          | <b>Natural and cultural resources</b>                           |          |
|                                                         |          | 13.02 Carbon dioxide damage.....                                | 100      |
|                                                         |          | 13.04 Business concern for ecosystems .....                     | 78       |

# El Salvador

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 6.9   |
| Surface area (1,000 square kilometers) .....              | 21.0  |
| Gross domestic product (US\$ billions), 2005 .....        | 17.0  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 4,518 |
| Real GDP growth (percent), 2005 .....                     | 2.8   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

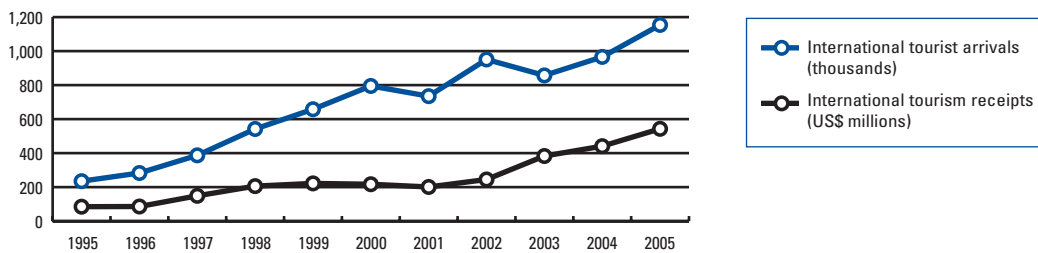
|                               |     | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-----|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 634 | 3.6                 | 2.6                                         |
| Employment (1,000 jobs) ..... | 89  | 3.1                 | 2.1                                         |

### T&T economy, 2006 estimates

|                               |       |     |     |
|-------------------------------|-------|-----|-----|
| GDP (US\$ millions) .....     | 1,509 | 8.5 | 2.8 |
| Employment (1,000 jobs) ..... | 209   | 7.4 | 2.3 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 1,154 |
| International tourism receipts (US\$ millions), 2005 ..... | 543   |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>77</b>            | <b>3.9</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>75</b>            | <b>4.0</b>           |
| Policy rules and regulations .....                           | 9                    | 5.6                  |
| Environmental regulation .....                               | 63                   | 4.0                  |
| Safety and security .....                                    | 118                  | 3.1                  |
| Health and hygiene .....                                     | 73                   | 4.3                  |
| Prioritization of T&T strategies .....                       | 100                  | 3.1                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>66</b>            | <b>3.3</b>           |
| Air transport infrastructure .....                           | 57                   | 3.2                  |
| Ground transport infrastructure .....                        | 63                   | 3.5                  |
| Tourism infrastructure .....                                 | 78                   | 2.6                  |
| ICT infrastructure .....                                     | 66                   | 2.5                  |
| Price competitiveness in T&T industry .....                  | 36                   | 4.9                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>98</b>            | <b>4.4</b>           |
| Human resources .....                                        | 41                   | 5.3                  |
| Education and training .....                                 | 81                   | 4.4                  |
| Availability of qualified labor .....                        | 14                   | 5.2                  |
| Workforce wellness .....                                     | 66                   | 6.3                  |
| National tourism perception .....                            | 102                  | 4.4                  |
| Natural and cultural resources .....                         | 103                  | 3.4                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."



## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                  | Rank/124 | COMPETITIVE DISADVANTAGES                                        | Rank/124 |
|---------------------------------------------------------|----------|------------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                     |          | <b>Policy rules and regulations</b>                              |          |
| 1.05 Openness of bilateral Air Service Agreements ..... | 1        | 1.02 Property rights .....                                       | 67       |
| 1.03 Rules governing foreign direct investment .....    | 27       | 1.01 Foreign ownership restrictions .....                        | 52       |
| 1.04 Visa requirements .....                            | 43       |                                                                  |          |
| <b>Air transport infrastructure</b>                     |          | <b>Environmental regulation</b>                                  |          |
| 6.01 Quality of air transport infrastructure .....      | 25       | 2.02 Clarity and stability of environmental regulations .....    | 69       |
| 6.06 International air transport network .....          | 30       | 2.03 Government prioritization of sustainable T&T .....          | 69       |
| 6.03 Departures per 1,000 population .....              | 37       | 2.01 Stringency of environmental regulation .....                | 53       |
| 6.04 Airport density .....                              | 46       |                                                                  |          |
| <b>Ground transport infrastructure</b>                  |          | <b>Safety and security</b>                                       |          |
| 7.01 Road infrastructure .....                          | 31       | 3.03 Business costs of crime and violence .....                  | 122      |
|                                                         |          | 3.01 Business costs of terrorism .....                           | 109      |
|                                                         |          | 3.02 Reliability of police services .....                        | 80       |
| <b>Price competitiveness in the T&amp;T industry</b>    |          | <b>Health and hygiene</b>                                        |          |
| 10.02 Purchasing power parity .....                     | 1        | 4.04 Access to improved drinking water .....                     | 78       |
| 10.03 Extent and effect of taxation .....               | 26       | 4.03 Access to improved sanitation .....                         | 72       |
| 10.04 Fuel price level .....                            | 45       | 4.02 Physician density .....                                     | 70       |
|                                                         |          | 4.01 Gov't efforts to reduce health risks from pandemics .....   | 69       |
| <b>Human resources</b>                                  |          | <b>Prioritization of Travel &amp; Tourism</b>                    |          |
| 11.01 Primary education enrollment .....                | 1        | 5.04 T&T fair attendance .....                                   | 105      |
| 11.07 Ease of hiring foreign labor .....                | 9        | 5.03 Effectiveness of marketing and branding .....               | 76       |
| 11.06 Hiring and firing practices .....                 | 21       | 5.02 T&T government expenditure .....                            | 73       |
|                                                         |          | 5.01 Government prioritization of the T&T industry .....         | 69       |
| <b>Natural and cultural resources</b>                   |          | <b>Air transport infrastructure</b>                              |          |
| 13.02 Carbon dioxide damage .....                       | 34       | 6.05 Number of operating airlines .....                          | 106      |
|                                                         |          | 6.02 Available seat kilometers .....                             | 74       |
|                                                         |          | <b>Ground transport infrastructure</b>                           |          |
|                                                         |          | 7.02 Railroad infrastructure .....                               | 114      |
|                                                         |          | 7.04 Domestic transport network .....                            | 70       |
|                                                         |          | 7.03 Port infrastructure .....                                   | 57       |
|                                                         |          | <b>Tourism infrastructure</b>                                    |          |
|                                                         |          | 8.01 Hotel rooms .....                                           | 98       |
|                                                         |          | 8.03 ATMs accepting Visa cards .....                             | 84       |
|                                                         |          | 8.02 Presence of major car rental companies .....                | 55       |
|                                                         |          | <b>ICT infrastructure</b>                                        |          |
|                                                         |          | 9.03 Telephone lines .....                                       | 71       |
|                                                         |          | 9.02 Internet users .....                                        | 68       |
|                                                         |          | 9.01 Extent of business Internet use .....                       | 53       |
|                                                         |          | <b>Price competitiveness in the T&amp;T industry</b>             |          |
|                                                         |          | 10.01 Ticket taxes and airport charges .....                     | 119      |
|                                                         |          | <b>Human resources</b>                                           |          |
|                                                         |          | 11.02 Secondary education enrollment .....                       | 94       |
|                                                         |          | 11.08 HIV prevalence .....                                       | 82       |
|                                                         |          | 11.04 Local availability of research and training services ..... | 74       |
|                                                         |          | 11.03 Quality of the educational system .....                    | 66       |
|                                                         |          | 11.11 Life expectancy .....                                      | 66       |
|                                                         |          | 11.05 Extent of staff training .....                             | 63       |
|                                                         |          | 11.10 Tuberculosis incidence .....                               | 61       |
|                                                         |          | <b>National tourism perception</b>                               |          |
|                                                         |          | 12.03 Recommendation to extend business trips .....              | 105      |
|                                                         |          | 12.02 Attitude toward tourists .....                             | 79       |
|                                                         |          | 12.01 Tourism openness .....                                     | 61       |
|                                                         |          | <b>Natural and cultural resources</b>                            |          |
|                                                         |          | 13.03 Nationally protected areas .....                           | 105      |
|                                                         |          | 13.01 Number of World Heritage sites .....                       | 87       |
|                                                         |          | 13.05 Risk of malaria and yellow fever .....                     | 83       |
|                                                         |          | 13.04 Business concern for ecosystems .....                      | 64       |

# Estonia

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 1.3    |
| Surface area (1,000 square kilometers) .....              | 45.2   |
| Gross domestic product (US\$ billions), 2005 .....        | 13.1   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 16,414 |
| Real GDP growth (percent), 2005 .....                     | 9.8    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

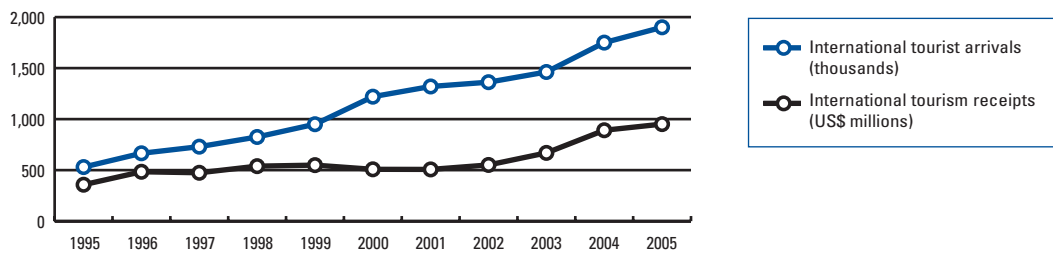
|                               |     | Percent<br>of total | 2007–2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-----|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 479 | 3.5                 | 7.5                                         |
| Employment (1,000 jobs) ..... | 22  | 3.1                 | 1.6                                         |

### T&T economy, 2006 estimates

|                               |       |      |     |
|-------------------------------|-------|------|-----|
| GDP (US\$ millions) .....     | 2,199 | 16.0 | 7.0 |
| Employment (1,000 jobs) ..... | 97    | 13.9 | 1.0 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 1,900 |
| International tourism receipts (US\$ millions), 2005 ..... | 951   |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1–7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>28</b>            | <b>4.9</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>32</b>            | <b>5.1</b>           |
| Policy rules and regulations .....                           | 47                   | 4.9                  |
| Environmental regulation .....                               | 32                   | 4.8                  |
| Safety and security .....                                    | 28                   | 5.3                  |
| Health and hygiene .....                                     | 30                   | 5.7                  |
| Prioritization of T&T strategies .....                       | 28                   | 4.7                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>25</b>            | <b>4.5</b>           |
| Air transport infrastructure .....                           | 56                   | 3.2                  |
| Ground transport infrastructure .....                        | 31                   | 4.5                  |
| Tourism infrastructure .....                                 | 21                   | 4.8                  |
| ICT infrastructure .....                                     | 19                   | 4.9                  |
| Price competitiveness in T&T industry .....                  | 34                   | 4.9                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>34</b>            | <b>5.2</b>           |
| Human resources .....                                        | 30                   | 5.4                  |
| Education and training .....                                 | 24                   | 5.6                  |
| Availability of qualified labor .....                        | 60                   | 4.4                  |
| Workforce wellness .....                                     | 62                   | 6.4                  |
| National tourism perception .....                            | 31                   | 5.5                  |
| Natural and cultural resources .....                         | 49                   | 4.5                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                           | Rank/124 | COMPETITIVE DISADVANTAGES                                      | Rank/124 |
|------------------------------------------------------------------|----------|----------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                              |          | <b>Policy rules and regulations</b>                            |          |
| 1.03 Rules governing foreign direct investment .....             | 9        | 1.05 Openness of bilateral Air Service Agreements .....        | 117      |
| 1.01 Foreign ownership restrictions .....                        | 26       | 1.04 Visa requirements .....                                   | 43       |
| 1.02 Property rights .....                                       | 27       |                                                                |          |
| <b>Health and hygiene</b>                                        |          | <b>Environmental regulation</b>                                |          |
| 4.02 Physician density .....                                     | 2        | 2.03 Government prioritization of sustainable T&T .....        | 45       |
|                                                                  |          | 2.01 Stringency of environmental regulation .....              | 36       |
|                                                                  |          | 2.02 Clarity and stability of environmental regulations .....  | 28       |
| <b>Prioritization of Travel &amp; Tourism</b>                    |          | <b>Safety and security</b>                                     |          |
| 5.02 T&T government expenditure .....                            | 13       | 3.02 Reliability of police services .....                      | 38       |
|                                                                  |          | 3.01 Business costs of terrorism .....                         | 33       |
|                                                                  |          | 3.03 Business costs of crime and violence .....                | 33       |
| <b>Air transport infrastructure</b>                              |          | <b>Health and hygiene</b>                                      |          |
| 6.04 Airport density .....                                       | 26       | 4.01 Gov't efforts to reduce health risks from pandemics ..... | 58       |
|                                                                  |          |                                                                |          |
| <b>Ground transport infrastructure</b>                           |          | <b>Prioritization of Travel &amp; Tourism</b>                  |          |
| 7.03 Port infrastructure .....                                   | 25       | 5.01 Government prioritization of the T&T industry .....       | 56       |
|                                                                  |          | 5.04 T&T fair attendance .....                                 | 48       |
|                                                                  |          | 5.03 Effectiveness of marketing and branding .....             | 42       |
| <b>Tourism infrastructure</b>                                    |          | <b>Air transport infrastructure</b>                            |          |
| 8.01 Hotel rooms .....                                           | 19       | 6.02 Available seat kilometers .....                           | 103      |
| 8.03 ATMs accepting Visa cards .....                             | 21       | 6.05 Number of operating airlines .....                        | 88       |
|                                                                  |          | 6.06 International air transport network .....                 | 53       |
| <b>ICT infrastructure</b>                                        |          | 6.01 Quality of air transport infrastructure .....             | 44       |
| 9.01 Extent of business Internet use .....                       | 3        | 6.03 Departures per 1,000 population .....                     | 41       |
| 9.02 Internet users .....                                        | 16       |                                                                |          |
| <b>Price competitiveness in the T&amp;T industry</b>             |          | <b>Ground transport infrastructure</b>                         |          |
| 10.03 Extent and effect of taxation .....                        | 13       | 7.01 Road infrastructure .....                                 | 56       |
|                                                                  |          | 7.02 Railroad infrastructure .....                             | 36       |
|                                                                  |          | 7.04 Domestic transport network .....                          | 33       |
| <b>Human resources</b>                                           |          | <b>Tourism infrastructure</b>                                  |          |
| 11.09 Malaria incidence .....                                    | 1        | 8.02 Presence of major car rental companies .....              | 35       |
| 11.04 Local availability of research and training services ..... | 26       |                                                                |          |
| 11.05 Extent of staff training .....                             | 27       | <b>ICT infrastructure</b>                                      |          |
|                                                                  |          | 9.03 Telephone lines .....                                     | 36       |
| <b>National tourism perception</b>                               |          | <b>Price competitiveness in the T&amp;T industry</b>           |          |
| 12.01 Tourism openness .....                                     | 21       | 10.04 Fuel price level .....                                   | 86       |
| 12.03 Recommendation to extend business trips .....              | 27       | 10.02 Purchasing power parity .....                            | 74       |
|                                                                  |          | 10.01 Ticket taxes and airport charges .....                   | 32       |
| <b>Natural and cultural resources</b>                            |          | <b>Human resources</b>                                         |          |
| 13.05 Risk of malaria and yellow fever .....                     | 1        | 11.08 HIV prevalence .....                                     | 90       |
| 13.04 Business concern for ecosystems .....                      | 27       | 11.01 Primary education enrollment .....                       | 79       |
|                                                                  |          | 11.07 Ease of hiring foreign labor .....                       | 77       |
|                                                                  |          | 11.11 Life expectancy .....                                    | 53       |
|                                                                  |          | 11.10 Tuberculosis incidence .....                             | 50       |
|                                                                  |          | 11.06 Hiring and firing practices .....                        | 48       |
|                                                                  |          | 11.03 Quality of the educational system .....                  | 31       |
|                                                                  |          | 11.02 Secondary education enrollment .....                     | 29       |
|                                                                  |          | <b>National tourism perception</b>                             |          |
|                                                                  |          | 12.02 Attitude toward tourists .....                           | 45       |
|                                                                  |          | <b>Natural and cultural resources</b>                          |          |
|                                                                  |          | 13.02 Carbon dioxide damage .....                              | 101      |
|                                                                  |          | 13.01 Number of World Heritage sites .....                     | 73       |
|                                                                  |          | 13.03 Nationally protected areas .....                         | 37       |

# Ethiopia

## Key indicators

|                                                           |         |
|-----------------------------------------------------------|---------|
| Population (millions), 2005 .....                         | 71.3    |
| Surface area (1,000 square kilometers) .....              | 1,104.3 |
| Gross domestic product (US\$ billions), 2005 .....        | 11.2    |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 823     |
| Real GDP growth (percent), 2005 .....                     | 8.7     |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

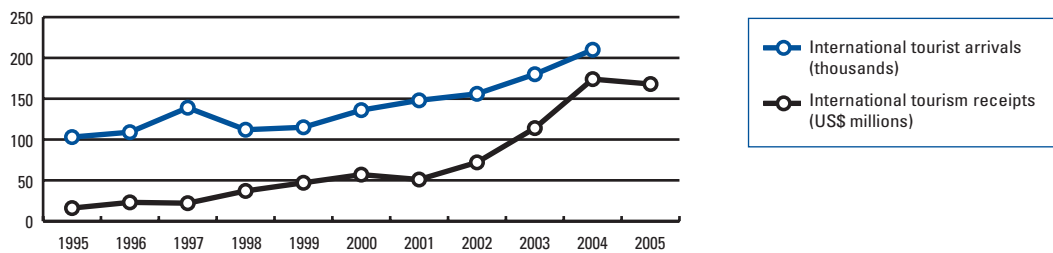
|                               |     | Percent<br>of total | 2007–2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-----|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 525 | 5.5                 | 4.7                                         |
| Employment (1,000 jobs) ..... | 788 | 4.2                 | 2.3                                         |

### T&T economy, 2006 estimates

|                               |       |      |     |
|-------------------------------|-------|------|-----|
| GDP (US\$ millions) .....     | 1,029 | 10.7 | 4.8 |
| Employment (1,000 jobs) ..... | 1,570 | 8.3  | 2.4 |

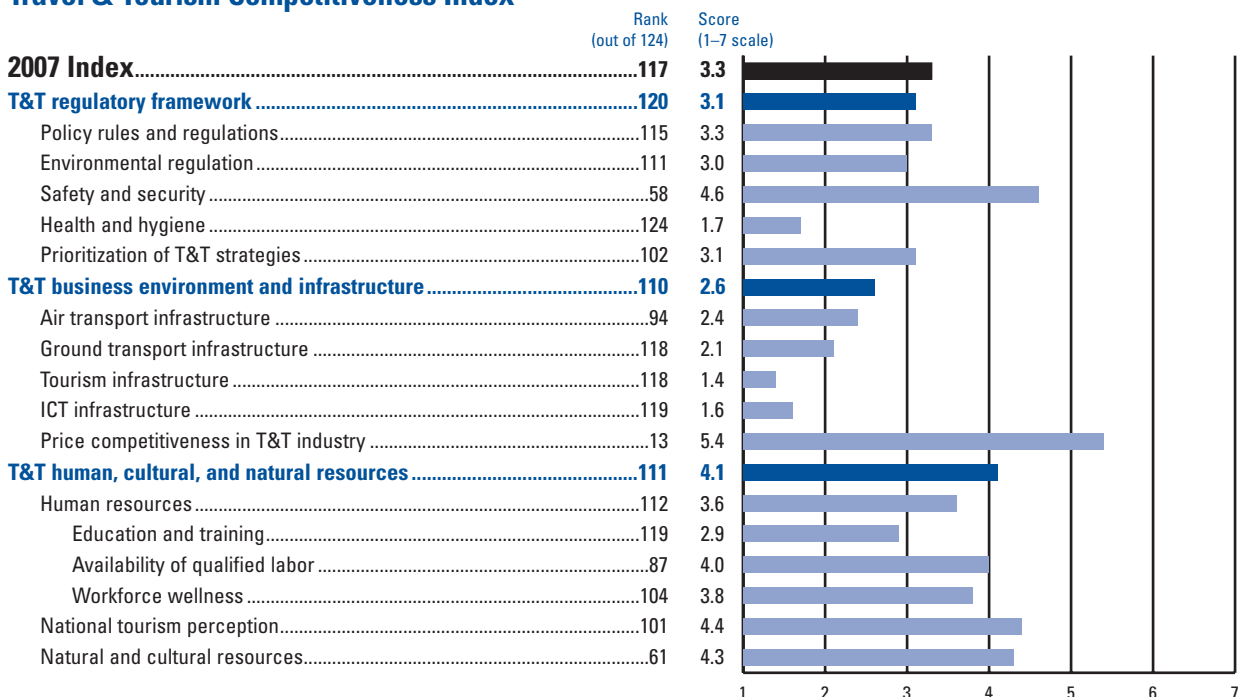
Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2004 .....         | 210 |
| International tourism receipts (US\$ millions), 2005 ..... | 168 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index



Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               |                                        | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                            | Rank/124 |
|------------------------------------------------------|----------------------------------------|----------|------------------------------------------------------|------------------------------------------------------------|----------|
| <b>Prioritization of Travel &amp; Tourism</b>        |                                        |          | <b>Policy rules and regulations</b>                  |                                                            |          |
| 5.04                                                 | T&T fair attendance .....              | 48       | 1.01                                                 | Foreign ownership restrictions .....                       | 115      |
| <b>Price competitiveness in the T&amp;T industry</b> |                                        |          | 1.04                                                 | Visa requirements .....                                    | 106      |
| 10.02                                                | Purchasing power parity .....          | 6        | 1.02                                                 | Property rights .....                                      | 99       |
| 10.04                                                | Fuel price level .....                 | 26       | 1.03                                                 | Rules governing foreign direct investment .....            | 87       |
| 10.01                                                | Ticket taxes and airport charges ..... | 29       | 1.05                                                 | Openness of bilateral Air Service Agreements .....         | 55       |
| <b>National tourism perception</b>                   |                                        |          | <b>Environmental regulation</b>                      |                                                            |          |
| 12.02                                                | Attitude toward tourists .....         | 41       | 2.02                                                 | Clarity and stability of environmental regulations .....   | 118      |
| <b>Natural and cultural resources</b>                |                                        |          | 2.01                                                 | Stringency of environmental regulation .....               | 116      |
| 13.03                                                | Nationally protected areas .....       | 23       | 2.03                                                 | Government prioritization of sustainable T&T .....         | 105      |
| 13.01                                                | Number of World Heritage sites .....   | 24       | <b>Safety and security</b>                           |                                                            |          |
|                                                      |                                        |          | 3.03                                                 | Business costs of crime and violence .....                 | 61       |
|                                                      |                                        |          | 3.02                                                 | Reliability of police services .....                       | 60       |
|                                                      |                                        |          | 3.01                                                 | Business costs of terrorism .....                          | 57       |
|                                                      |                                        |          | <b>Health and hygiene</b>                            |                                                            |          |
|                                                      |                                        |          | 4.02                                                 | Physician density .....                                    | 119      |
|                                                      |                                        |          | 4.04                                                 | Access to improved drinking water .....                    | 114      |
|                                                      |                                        |          | 4.03                                                 | Access to improved sanitation .....                        | 112      |
|                                                      |                                        |          | 4.01                                                 | Gov't efforts to reduce health risks from pandemics .....  | 92       |
|                                                      |                                        |          | <b>Prioritization of Travel &amp; Tourism</b>        |                                                            |          |
|                                                      |                                        |          | 5.01                                                 | Government prioritization of the T&T industry .....        | 106      |
|                                                      |                                        |          | 5.03                                                 | Effectiveness of marketing and branding .....              | 99       |
|                                                      |                                        |          | 5.02                                                 | T&T government expenditure .....                           | 78       |
|                                                      |                                        |          | <b>Air transport infrastructure</b>                  |                                                            |          |
|                                                      |                                        |          | 6.04                                                 | Airport density .....                                      | 111      |
|                                                      |                                        |          | 6.03                                                 | Departures per 1,000 population .....                      | 95       |
|                                                      |                                        |          | 6.05                                                 | Number of operating airlines .....                         | 94       |
|                                                      |                                        |          | 6.06                                                 | International air transport network .....                  | 75       |
|                                                      |                                        |          | 6.02                                                 | Available seat kilometers .....                            | 71       |
|                                                      |                                        |          | 6.01                                                 | Quality of air transport infrastructure .....              | 64       |
|                                                      |                                        |          | <b>Ground transport infrastructure</b>               |                                                            |          |
|                                                      |                                        |          | 7.03                                                 | Port infrastructure .....                                  | 120      |
|                                                      |                                        |          | 7.04                                                 | Domestic transport network .....                           | 111      |
|                                                      |                                        |          | 7.02                                                 | Railroad infrastructure .....                              | 110      |
|                                                      |                                        |          | 7.01                                                 | Road infrastructure .....                                  | 99       |
|                                                      |                                        |          | <b>Tourism infrastructure</b>                        |                                                            |          |
|                                                      |                                        |          | 8.01                                                 | Hotel rooms .....                                          | 115      |
|                                                      |                                        |          | 8.02                                                 | Presence of major car rental companies .....               | 113      |
|                                                      |                                        |          | <b>ICT infrastructure</b>                            |                                                            |          |
|                                                      |                                        |          | 9.02                                                 | Internet users .....                                       | 122      |
|                                                      |                                        |          | 9.03                                                 | Telephone lines .....                                      | 114      |
|                                                      |                                        |          | 9.01                                                 | Extent of business Internet use .....                      | 112      |
|                                                      |                                        |          | <b>Price competitiveness in the T&amp;T industry</b> |                                                            |          |
|                                                      |                                        |          | 10.03                                                | Extent and effect of taxation .....                        | 59       |
|                                                      |                                        |          | <b>Human resources</b>                               |                                                            |          |
|                                                      |                                        |          | 11.01                                                | Primary education enrollment .....                         | 119      |
|                                                      |                                        |          | 11.05                                                | Extent of staff training .....                             | 119      |
|                                                      |                                        |          | 11.10                                                | Tuberculosis incidence .....                               | 111      |
|                                                      |                                        |          | 11.02                                                | Secondary education enrollment .....                       | 110      |
|                                                      |                                        |          | 11.04                                                | Local availability of research and training services ..... | 110      |
|                                                      |                                        |          | 11.08                                                | HIV prevalence .....                                       | 110      |
|                                                      |                                        |          | 11.11                                                | Life expectancy .....                                      | 108      |
|                                                      |                                        |          | 11.09                                                | Malaria incidence .....                                    | 103      |
|                                                      |                                        |          | 11.07                                                | Ease of hiring foreign labor .....                         | 97       |
|                                                      |                                        |          | 11.03                                                | Quality of the educational system .....                    | 95       |
|                                                      |                                        |          | 11.06                                                | Hiring and firing practices .....                          | 74       |

(Disadvantages cont'd. from bottom of right column)

&lt;&lt;&lt; (Cont'd. on bottom of left column)

# Finland

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 5.2    |
| Surface area (1,000 square kilometers) .....              | 338.2  |
| Gross domestic product (US\$ billions), 2005 .....        | 196.1  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 31,208 |
| Real GDP growth (percent), 2005 .....                     | 2.9    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

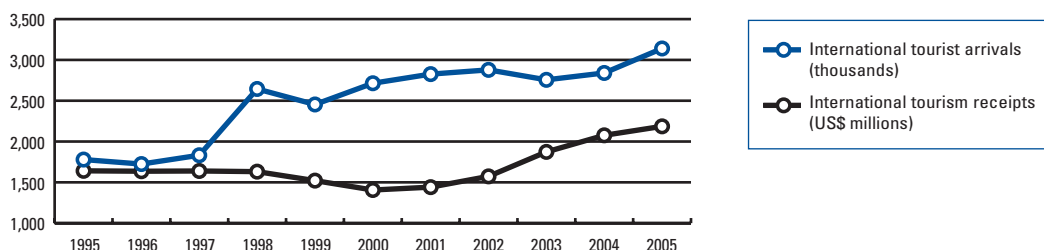
|                               |       | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 6,385 | 3.2                 | 2.5                                         |
| Employment (1,000 jobs) ..... | 78    | 3.2                 | 0.6                                         |

### T&T economy, 2006 estimates

|                               |        |     |     |
|-------------------------------|--------|-----|-----|
| GDP (US\$ millions) .....     | 18,307 | 9.1 | 2.8 |
| Employment (1,000 jobs) ..... | 234    | 9.7 | 0.9 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 3,140 |
| International tourism receipts (US\$ millions), 2005 ..... | 2,186 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>16</b>            | <b>5.2</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>7</b>             | <b>5.6</b>           |
| Policy rules and regulations .....                           | 15                   | 5.5                  |
| Environmental regulation .....                               | 5                    | 6.0                  |
| Safety and security .....                                    | 1                    | 6.5                  |
| Health and hygiene .....                                     | 6                    | 6.3                  |
| Prioritization of T&T strategies .....                       | 65                   | 3.8                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>18</b>            | <b>4.7</b>           |
| Air transport infrastructure .....                           | 19                   | 4.6                  |
| Ground transport infrastructure .....                        | 10                   | 5.9                  |
| Tourism infrastructure .....                                 | 29                   | 4.3                  |
| ICT infrastructure .....                                     | 15                   | 5.2                  |
| Price competitiveness in T&T industry .....                  | 117                  | 3.4                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>33</b>            | <b>5.2</b>           |
| Human resources .....                                        | 8                    | 5.9                  |
| Education and training .....                                 | 2                    | 6.3                  |
| Availability of qualified labor .....                        | 57                   | 4.4                  |
| Workforce wellness .....                                     | 13                   | 6.9                  |
| National tourism perception .....                            | 109                  | 4.2                  |
| Natural and cultural resources .....                         | 18                   | 5.5                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                          | Rank/124 | COMPETITIVE DISADVANTAGES                                | Rank/124 |
|-----------------------------------------------------------------|----------|----------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                             |          | <b>Policy rules and regulations</b>                      |          |
| 1.02 Property rights.....                                       | 8        | 1.04 Visa requirements .....                             | 43       |
| 1.01 Foreign ownership restrictions.....                        | 11       | 1.05 Openness of bilateral Air Service Agreements .....  | 34       |
| 1.03 Rules governing foreign direct investment .....            | 14       |                                                          |          |
| <b>Environmental regulation</b>                                 |          | <b>Health and hygiene</b>                                |          |
| 2.02 Clarity and stability of environmental regulations .....   | 5        | 4.02 Physician density .....                             | 26       |
| 2.01 Stringency of environmental regulation .....               | 6        |                                                          |          |
| 2.03 Government prioritization of sustainable T&T .....         | 11       | <b>Prioritization of Travel &amp; Tourism</b>            |          |
| <b>Safety and security</b>                                      |          | 5.01 Government prioritization of the T&T industry ..... | 100      |
| 3.01 Business costs of terrorism .....                          | 1        | 5.03 Effectiveness of marketing and branding .....       | 68       |
| 3.02 Reliability of police services .....                       | 1        | 5.02 T&T government expenditure .....                    | 62       |
| 3.03 Business costs of crime and violence.....                  | 2        | 5.04 T&T fair attendance .....                           | 23       |
| <b>Health and hygiene</b>                                       |          |                                                          |          |
| 4.03 Access to improved sanitation .....                        | 1        | <b>Air transport infrastructure</b>                      |          |
| 4.04 Access to improved drinking water .....                    | 1        | 6.05 Number of operating airlines .....                  | 54       |
| 4.01 Gov't efforts to reduce health risks from pandemics .....  | 2        | 6.02 Available seat kilometers.....                      | 45       |
|                                                                 |          | 6.04 Airport density .....                               | 19       |
| <b>Air transport infrastructure</b>                             |          |                                                          |          |
| 6.06 International air transport network .....                  | 9        | <b>Ground transport infrastructure</b>                   |          |
| 6.01 Quality of air transport infrastructure .....              | 10       | 7.01 Road infrastructure.....                            | 19       |
| 6.03 Departures per 1,000 population.....                       | 13       |                                                          |          |
| <b>Ground transport infrastructure</b>                          |          | <b>Tourism infrastructure</b>                            |          |
| 7.03 Port infrastructure .....                                  | 7        | 8.02 Presence of major car rental companies.....         | 35       |
| 7.04 Domestic transport network .....                           | 9        | 8.03 ATMs accepting Visa cards .....                     | 32       |
| 7.02 Railroad infrastructure .....                              | 10       | 8.01 Hotel rooms.....                                    | 23       |
| <b>ICT infrastructure</b>                                       |          |                                                          |          |
| 9.02 Internet users .....                                       | 7        | <b>ICT infrastructure</b>                                |          |
| 9.01 Extent of business Internet use .....                      | 15       | 9.03 Telephone lines.....                                | 26       |
| <b>Human resources</b>                                          |          |                                                          |          |
| 11.01 Primary education enrollment .....                        | 1        | <b>Price competitiveness in the T&amp;T industry</b>     |          |
| 11.02 Secondary education enrollment.....                       | 1        | 10.02 Purchasing power parity.....                       | 112      |
| 11.03 Quality of the educational system .....                   | 1        | 10.04 Fuel price level .....                             | 111      |
| 11.09 Malaria incidence.....                                    | 1        | 10.03 Extent and effect of taxation.....                 | 100      |
| 11.04 Local availability of research and training services..... | 6        | 10.01 Ticket taxes and airport charges.....              | 47       |
| 11.05 Extent of staff training.....                             | 8        |                                                          |          |
| 11.07 Ease of hiring foreign labor .....                        | 15       | <b>Human resources</b>                                   |          |
| 11.10 Tuberculosis incidence .....                              | 15       | 11.06 Hiring and firing practices.....                   | 91       |
| 11.11 Life expectancy .....                                     | 15       | 11.08 HIV prevalence .....                               | 25       |
| <b>Natural and cultural resources</b>                           |          |                                                          |          |
| 13.04 Business concern for ecosystems .....                     | 1        | <b>National tourism perception</b>                       |          |
| 13.05 Risk of malaria and yellow fever .....                    | 1        | 12.03 Recommendation to extend business trips .....      | 111      |
|                                                                 |          | 12.01 Tourism openness .....                             | 86       |
|                                                                 |          | 12.02 Attitude toward tourists .....                     | 63       |
|                                                                 |          |                                                          |          |
|                                                                 |          | <b>Natural and cultural resources</b>                    |          |
|                                                                 |          | 13.03 Nationally protected areas.....                    | 47       |
|                                                                 |          | 13.01 Number of World Heritage sites .....               | 40       |
|                                                                 |          | 13.02 Carbon dioxide damage.....                         | 24       |



# France

## Key indicators

|                                                           |         |
|-----------------------------------------------------------|---------|
| Population (millions), 2005 .....                         | 60.7    |
| Surface area (1,000 square kilometers) .....              | 551.5   |
| Gross domestic product (US\$ billions), 2005 .....        | 2,126.7 |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 29,187  |
| Real GDP growth (percent), 2005 .....                     | 1.2     |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

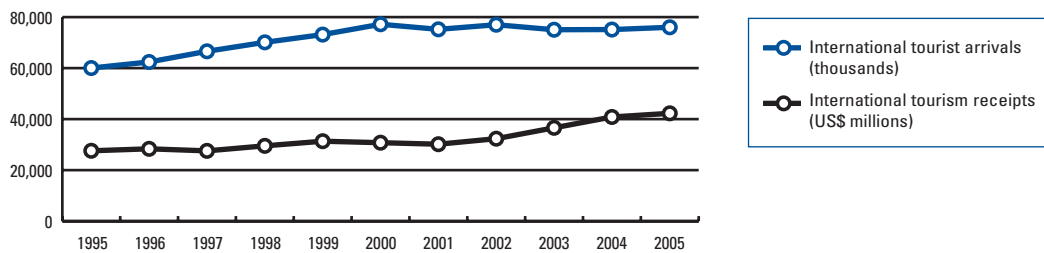
|                               |        | Percent<br>of total | 2007–2016<br>annual growth<br>(%, forecast) |
|-------------------------------|--------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 95,794 | 4.4                 | 3.2                                         |
| Employment (1,000 jobs) ..... | 1,392  | 5.5                 | 2.4                                         |

### T&T economy, 2006 estimates

|                               |         |      |     |
|-------------------------------|---------|------|-----|
| GDP (US\$ millions) .....     | 249,997 | 11.4 | 3.4 |
| Employment (1,000 jobs) ..... | 3,454   | 13.8 | 2.4 |

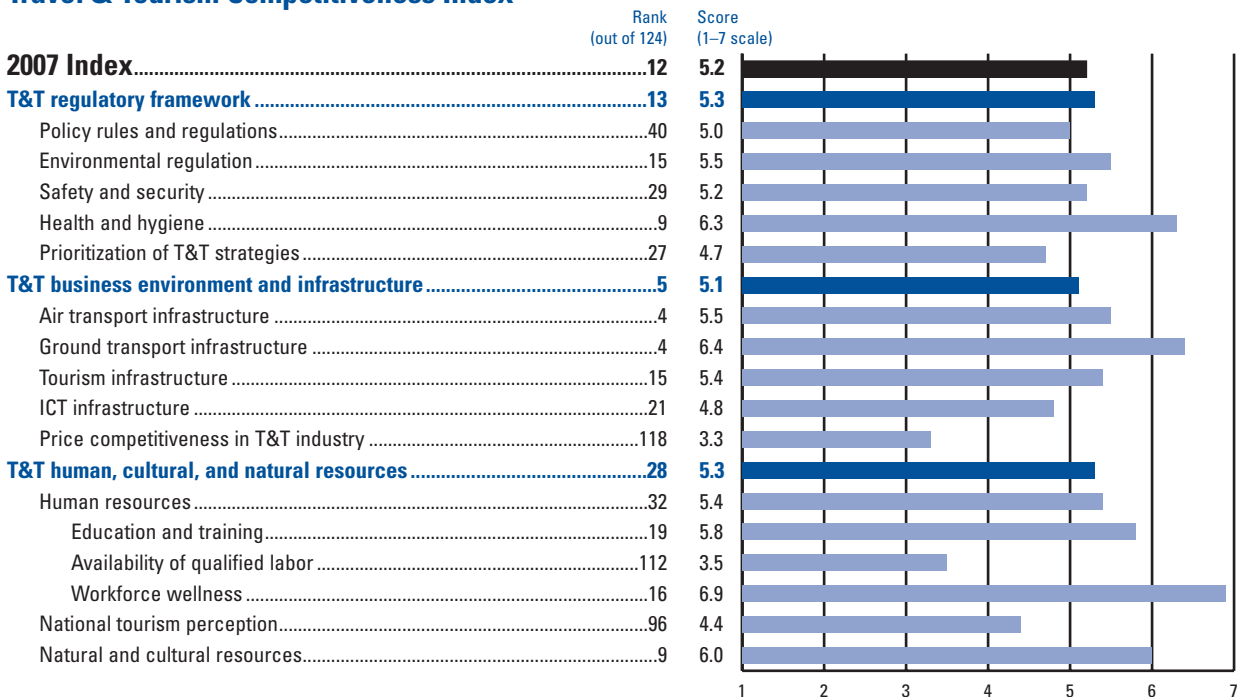
Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |        |
|------------------------------------------------------------|--------|
| International tourist arrivals (1,000), 2005 .....         | 76,001 |
| International tourism receipts (US\$ millions), 2005 ..... | 42,276 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index



Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                        |                                               | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                           | Rank/124 |
|-----------------------------------------------|-----------------------------------------------|----------|------------------------------------------------------|-----------------------------------------------------------|----------|
| <b>Health and hygiene</b>                     |                                               |          | <b>Policy rules and regulations</b>                  |                                                           |          |
| 4.03                                          | Access to improved sanitation .....           | 1        | 1.05                                                 | Openness of bilateral Air Service Agreements .....        | 69       |
| 4.04                                          | Access to improved drinking water .....       | 1        | 1.01                                                 | Foreign ownership restrictions.....                       | 56       |
| <b>Prioritization of Travel &amp; Tourism</b> |                                               |          | 1.03                                                 | Rules governing foreign direct investment .....           | 55       |
| 5.04                                          | T&T fair attendance .....                     | 4        | 1.04                                                 | Visa requirements .....                                   | 43       |
| <b>Air transport infrastructure</b>           |                                               |          | 1.02                                                 | Property rights.....                                      | 18       |
| 6.05                                          | Number of operating airlines.....             | 3        | <b>Environmental regulation</b>                      |                                                           |          |
| 6.01                                          | Quality of air transport infrastructure ..... | 5        | 2.03                                                 | Government prioritization of sustainable T&T .....        | 23       |
| 6.02                                          | Available seat kilometers.....                | 6        | 2.02                                                 | Clarity and stability of environmental regulations .....  | 16       |
| 6.06                                          | International air transport network.....      | 7        | 2.01                                                 | Stringency of environmental regulation .....              | 14       |
| <b>Ground transport infrastructure</b>        |                                               |          | <b>Safety and security</b>                           |                                                           |          |
| 7.01                                          | Road infrastructure .....                     | 2        | 3.01                                                 | Business costs of terrorism .....                         | 68       |
| 7.02                                          | Railroad infrastructure .....                 | 3        | 3.03                                                 | Business costs of crime and violence.....                 | 45       |
| 7.04                                          | Domestic transport network .....              | 4        | 3.02                                                 | Reliability of police services .....                      | 18       |
| 7.03                                          | Port infrastructure .....                     | 10       | <b>Health and hygiene</b>                            |                                                           |          |
| <b>Tourism infrastructure</b>                 |                                               |          | 4.02                                                 | Physician density.....                                    | 19       |
| 8.02                                          | Presence of major car rental companies.....   | 1        | 4.01                                                 | Gov't efforts to reduce health risks from pandemics ..... | 12       |
| 8.03                                          | ATMs accepting Visa cards .....               | 9        | <b>Prioritization of Travel &amp; Tourism</b>        |                                                           |          |
| <b>Human resources</b>                        |                                               |          | 5.02                                                 | T&T government expenditure .....                          | 59       |
| 11.01                                         | Primary education enrollment .....            | 1        | 5.01                                                 | Government prioritization of the T&T industry.....        | 36       |
| 11.02                                         | Secondary education enrollment.....           | 1        | 5.03                                                 | Effectiveness of marketing and branding .....             | 28       |
| 11.09                                         | Malaria incidence.....                        | 1        | <b>Air transport infrastructure</b>                  |                                                           |          |
| 11.11                                         | Life expectancy .....                         | 8        | 6.04                                                 | Airport density .....                                     | 55       |
| <b>Natural and cultural resources</b>         |                                               |          | 6.03                                                 | Departures per 1,000 population.....                      | 23       |
| 13.05                                         | Risk of malaria and yellow fever .....        | 1        | <b>Tourism infrastructure</b>                        |                                                           |          |
| 13.01                                         | Number of World Heritage sites .....          | 5        | 8.01                                                 | Hotel rooms.....                                          | 26       |
| 13.02                                         | Carbon dioxide damage.....                    | 6        | <b>ICT infrastructure</b>                            |                                                           |          |
|                                               |                                               |          | 9.02                                                 | Internet users .....                                      | 28       |
|                                               |                                               |          | 9.01                                                 | Extent of business Internet use .....                     | 19       |
|                                               |                                               |          | 9.03                                                 | Telephone lines.....                                      | 13       |
|                                               |                                               |          | <b>Price competitiveness in the T&amp;T industry</b> |                                                           |          |
|                                               |                                               |          | 10.04                                                | Fuel price level .....                                    | 115      |
|                                               |                                               |          | 10.02                                                | Purchasing power parity.....                              | 110      |
|                                               |                                               |          | 10.03                                                | Extent and effect of taxation.....                        | 87       |
|                                               |                                               |          | 10.01                                                | Ticket taxes and airport charges.....                     | 76       |
|                                               |                                               |          | <b>Human resources</b>                               |                                                           |          |
|                                               |                                               |          | 11.06                                                | Hiring and firing practices.....                          | 122      |
|                                               |                                               |          | 11.07                                                | Ease of hiring foreign labor .....                        | 70       |
|                                               |                                               |          | 11.08                                                | HIV prevalence .....                                      | 69       |
|                                               |                                               |          | 11.03                                                | Quality of the educational system .....                   | 27       |
|                                               |                                               |          | 11.05                                                | Extent of staff training.....                             | 22       |
|                                               |                                               |          | 11.10                                                | Tuberculosis incidence .....                              | 21       |
|                                               |                                               |          | 11.04                                                | Local availability of research and training services..... | 12       |
|                                               |                                               |          | <b>National tourism perception</b>                   |                                                           |          |
|                                               |                                               |          | 12.02                                                | Attitude toward tourists .....                            | 122      |
|                                               |                                               |          | 12.01                                                | Tourism openness.....                                     | 67       |
|                                               |                                               |          | 12.03                                                | Recommendation to extend business trips .....             | 13       |
|                                               |                                               |          | <b>Natural and cultural resources</b>                |                                                           |          |
|                                               |                                               |          | 13.03                                                | Nationally protected areas.....                           | 34       |
|                                               |                                               |          | 13.04                                                | Business concern for ecosystems .....                     | 18       |

# Gambia

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 1.5   |
| Surface area (1,000 square kilometers) .....              | 11.3  |
| Gross domestic product (US\$ billions), 2005 .....        | 0.5   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 2,002 |
| Real GDP growth (percent), 2005 .....                     | 5.0   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

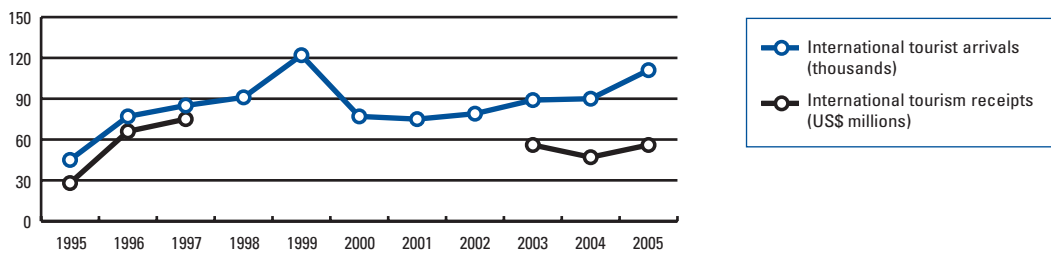
|                               |    | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|----|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 34 | 6.5                 | 3.8                                         |
| Employment (1,000 jobs) ..... | 34 | 5.2                 | 2.6                                         |

### T&T economy, 2006 estimates

|                               |    |      |     |
|-------------------------------|----|------|-----|
| GDP (US\$ millions) .....     | 75 | 14.6 | 3.8 |
| Employment (1,000 jobs) ..... | 77 | 11.7 | 2.6 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2005 .....         | 111 |
| International tourism receipts (US\$ millions), 2005 ..... | 56  |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>84</b>            | <b>3.8</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>52</b>            | <b>4.5</b>           |
| Policy rules and regulations .....                           | 74                   | 4.4                  |
| Environmental regulation .....                               | 43                   | 4.4                  |
| Safety and security .....                                    | 48                   | 4.8                  |
| Health and hygiene .....                                     | 95                   | 3.8                  |
| Prioritization of T&T strategies .....                       | 20                   | 5.0                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>106</b>           | <b>2.7</b>           |
| Air transport infrastructure .....                           | 102                  | 2.2                  |
| Ground transport infrastructure .....                        | 80                   | 3.0                  |
| Tourism infrastructure .....                                 | 108                  | 1.9                  |
| ICT infrastructure .....                                     | 104                  | 1.8                  |
| Price competitiveness in T&T industry .....                  | 73                   | 4.5                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>101</b>           | <b>4.3</b>           |
| Human resources .....                                        | 107                  | 4.0                  |
| Education and training .....                                 | 114                  | 3.5                  |
| Availability of qualified labor .....                        | 27                   | 4.8                  |
| Workforce wellness .....                                     | 107                  | 3.6                  |
| National tourism perception .....                            | 25                   | 5.7                  |
| Natural and cultural resources .....                         | 108                  | 3.2                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                        | Rank/124 | COMPETITIVE DISADVANTAGES                                       | Rank/124 |
|---------------------------------------------------------------|----------|-----------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                           |          | <b>Policy rules and regulations</b>                             |          |
| 1.03 Rules governing foreign direct investment .....          | 24       | 1.04 Visa requirements .....                                    | 92       |
| 1.01 Foreign ownership restrictions.....                      | 30       | 1.02 Property rights.....                                       | 79       |
| <b>Environmental regulation</b>                               |          | 1.05 Openness of bilateral Air Service Agreements .....         | 72       |
| 2.03 Government prioritization of sustainable T&T .....       | 19       | <b>Environmental regulation</b>                                 |          |
| 2.02 Clarity and stability of environmental regulations ..... | 44       | 2.01 Stringency of environmental regulation .....               | 62       |
| <b>Safety and security</b>                                    |          | <b>Safety and security</b>                                      |          |
| 3.01 Business costs of terrorism .....                        | 17       | 3.02 Reliability of police services .....                       | 71       |
| 3.03 Business costs of crime and violence.....                | 50       | <b>Health and hygiene</b>                                       |          |
| <b>Prioritization of Travel &amp; Tourism</b>                 |          | 4.02 Physician density .....                                    | 110      |
| 5.01 Government prioritization of the T&T industry.....       | 9        | 4.03 Access to improved sanitation .....                        | 82       |
| 5.02 T&T government expenditure .....                         | 9        | 4.04 Access to improved drinking water .....                    | 78       |
| 5.03 Effectiveness of marketing and branding .....            | 21       | 4.01 Gov't efforts to reduce health risks from pandemics .....  | 57       |
| <b>Price competitiveness in the T&amp;T industry</b>          |          | <b>Prioritization of Travel &amp; Tourism</b>                   |          |
| 10.02 Purchasing power parity.....                            | 4        | 5.04 T&T fair attendance .....                                  | 90       |
| 10.03 Extent and effect of taxation.....                      | 44       | <b>Air transport infrastructure</b>                             |          |
| <b>Human resources</b>                                        |          | 6.02 Available seat kilometers.....                             | 123      |
| 11.06 Hiring and firing practices.....                        | 29       | 6.04 Airport density .....                                      | 118      |
| 11.07 Ease of hiring foreign labor .....                      | 45       | 6.05 Number of operating airlines.....                          | 117      |
| <b>National tourism perception</b>                            |          | 6.06 International air transport network .....                  | 98       |
| 12.02 Attitude toward tourists .....                          | 14       | 6.01 Quality of air transport infrastructure .....              | 78       |
|                                                               |          | <b>Ground transport infrastructure</b>                          |          |
|                                                               |          | 7.02 Railroad infrastructure .....                              | 113      |
|                                                               |          | 7.04 Domestic transport network .....                           | 102      |
|                                                               |          | 7.01 Road infrastructure.....                                   | 75       |
|                                                               |          | 7.03 Port infrastructure .....                                  | 51       |
|                                                               |          | <b>Tourism infrastructure</b>                                   |          |
|                                                               |          | 8.02 Presence of major car rental companies.....                | 102      |
|                                                               |          | 8.03 ATMs accepting Visa cards .....                            | 101      |
|                                                               |          | <b>ICT infrastructure</b>                                       |          |
|                                                               |          | 9.03 Telephone lines.....                                       | 102      |
|                                                               |          | 9.01 Extent of business Internet use .....                      | 100      |
|                                                               |          | 9.02 Internet users .....                                       | 93       |
|                                                               |          | <b>Price competitiveness in the T&amp;T industry</b>            |          |
|                                                               |          | 10.01 Ticket taxes and airport charges.....                     | 120      |
|                                                               |          | 10.04 Fuel price level .....                                    | 68       |
|                                                               |          | <b>Human resources</b>                                          |          |
|                                                               |          | 11.09 Malaria incidence.....                                    | 118      |
|                                                               |          | 11.01 Primary education enrollment .....                        | 117      |
|                                                               |          | 11.04 Local availability of research and training services..... | 112      |
|                                                               |          | 11.10 Tuberculosis incidence .....                              | 102      |
|                                                               |          | 11.11 Life expectancy .....                                     | 102      |
|                                                               |          | 11.02 Secondary education enrollment.....                       | 101      |
|                                                               |          | 11.08 HIV prevalence .....                                      | 93       |
|                                                               |          | 11.05 Extent of staff training.....                             | 88       |
|                                                               |          | 11.03 Quality of the educational system .....                   | 55       |
|                                                               |          | <b>National tourism perception</b>                              |          |
|                                                               |          | 12.03 Recommendation to extend business trips .....             | 107      |
|                                                               |          | <b>Natural and cultural resources</b>                           |          |
|                                                               |          | 13.05 Risk of malaria and yellow fever .....                    | 103      |
|                                                               |          | 13.03 Nationally protected areas.....                           | 95       |
|                                                               |          | 13.01 Number of World Heritage sites .....                      | 73       |
|                                                               |          | 13.02 Carbon dioxide damage.....                                | 69       |
|                                                               |          | 13.04 Business concern for ecosystems .....                     | 60       |

# Georgia

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 4.5   |
| Surface area (1,000 square kilometers) .....              | 69.7  |
| Gross domestic product (US\$ billions), 2005 .....        | 6.4   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 3,586 |
| Real GDP growth (percent), 2005 .....                     | 9.3   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

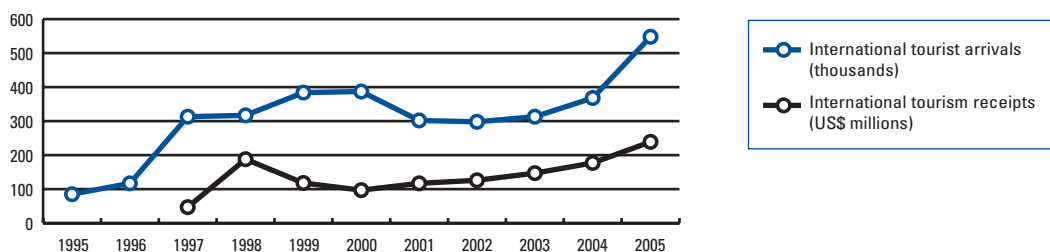
|                               | Percent of total | 2007–2016 annual growth (% forecast) |
|-------------------------------|------------------|--------------------------------------|
| GDP (US\$ millions) .....     | n/a              | n/a                                  |
| Employment (1,000 jobs) ..... | n/a              | n/a                                  |

### T&T economy, 2006 estimates

|                               |     |     |     |
|-------------------------------|-----|-----|-----|
| GDP (US\$ millions) .....     | n/a | n/a | n/a |
| Employment (1,000 jobs) ..... | n/a | n/a | n/a |

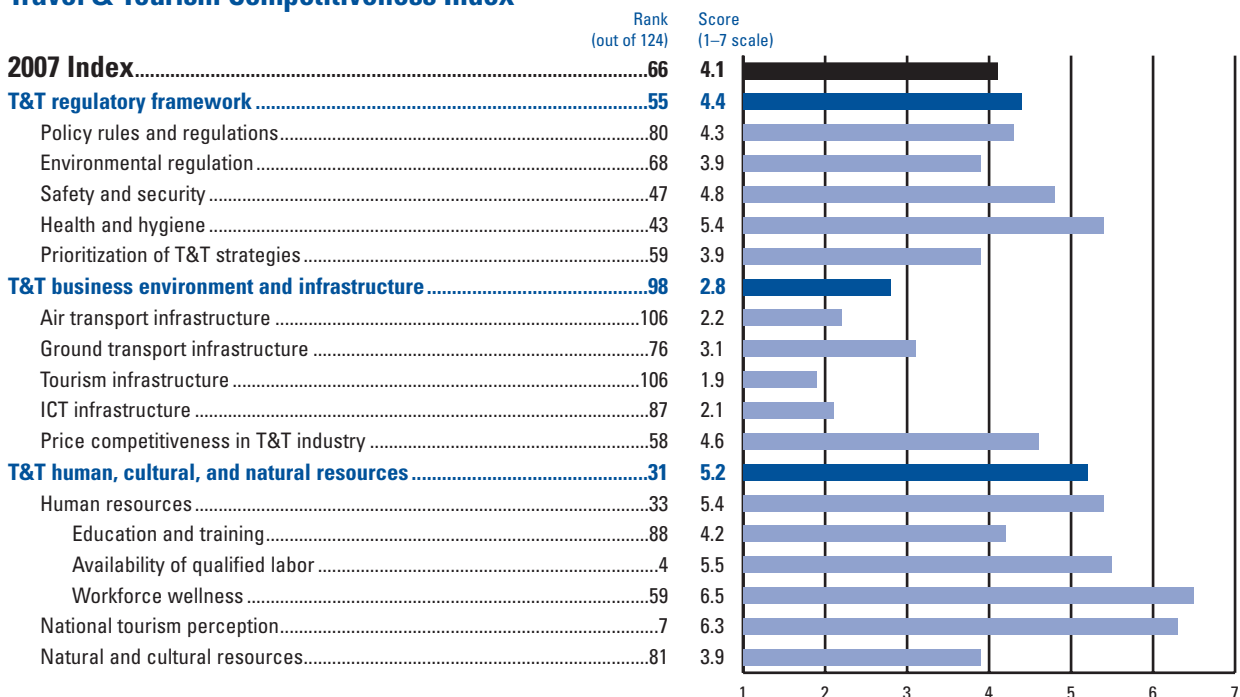
Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2005 .....         | 548 |
| International tourism receipts (US\$ millions), 2005 ..... | 239 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index



Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                     | Rank/124 | COMPETITIVE DISADVANTAGES                                           | Rank/124 |
|------------------------------------------------------------|----------|---------------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                        |          | <b>Policy rules and regulations</b>                                 |          |
| 1.04 Visa requirements .....1                              |          | 1.05 Openness of bilateral Air Service Agreements .....110          |          |
|                                                            |          | 1.02 Property rights .....102                                       |          |
| <b>Safety and security</b>                                 |          | 1.03 Rules governing foreign direct investment .....99              |          |
| 3.01 Business costs of terrorism .....45                   |          | 1.01 Foreign ownership restrictions .....94                         |          |
|                                                            |          | <b>Environmental regulation</b>                                     |          |
| <b>Health and hygiene</b>                                  |          | 2.03 Government prioritization of sustainable T&T .....71           |          |
| 4.02 Physician density .....6                              |          | 2.01 Stringency of environmental regulation .....64                 |          |
|                                                            |          | 2.02 Clarity and stability of environmental regulations .....62     |          |
| <b>Prioritization of Travel &amp; Tourism</b>              |          | <b>Safety and security</b>                                          |          |
| 5.01 Government prioritization of the T&T industry .....43 |          | 3.03 Business costs of crime and violence .....54                   |          |
| 5.04 T&T fair attendance .....48                           |          | 3.02 Reliability of police services .....52                         |          |
| <b>Price competitiveness in the T&amp;T industry</b>       |          | <b>Health and hygiene</b>                                           |          |
| 10.02 Purchasing power parity .....49                      |          | 4.04 Access to improved drinking water .....91                      |          |
| <b>Human resources</b>                                     |          | 4.01 Gov't efforts to reduce health risks from pandemics .....83    |          |
| 11.07 Ease of hiring foreign labor .....3                  |          | 4.03 Access to improved sanitation .....54                          |          |
| 11.06 Hiring and firing practices .....16                  |          | <b>Prioritization of Travel &amp; Tourism</b>                       |          |
| 11.08 HIV prevalence .....25                               |          | 5.03 Effectiveness of marketing and branding .....96                |          |
| 11.11 Life expectancy .....45                              |          | <b>Air transport infrastructure</b>                                 |          |
| <b>National tourism perception</b>                         |          | 6.02 Available seat kilometers .....106                             |          |
| 12.01 Tourism openness .....7                              |          | 6.06 International air transport network .....96                    |          |
| 12.03 Recommendation to extend business trips .....20      |          | 6.01 Quality of air transport infrastructure .....95                |          |
| 12.02 Attitude toward tourists .....46                     |          | 6.03 Departures per 1,000 population .....93                        |          |
|                                                            |          | 6.05 Number of operating airlines .....77                           |          |
|                                                            |          | 6.04 Airport density .....64                                        |          |
|                                                            |          | <b>Ground transport infrastructure</b>                              |          |
|                                                            |          | 7.04 Domestic transport network .....112                            |          |
|                                                            |          | 7.01 Road infrastructure .....80                                    |          |
|                                                            |          | 7.03 Port infrastructure .....70                                    |          |
|                                                            |          | 7.02 Railroad infrastructure .....52                                |          |
|                                                            |          | <b>Tourism infrastructure</b>                                       |          |
|                                                            |          | 8.02 Presence of major car rental companies .....102                |          |
|                                                            |          | 8.03 ATMs accepting Visa cards .....77                              |          |
|                                                            |          | 8.01 Hotel rooms .....69                                            |          |
|                                                            |          | <b>ICT infrastructure</b>                                           |          |
|                                                            |          | 9.01 Extent of business Internet use .....99                        |          |
|                                                            |          | 9.02 Internet users .....92                                         |          |
|                                                            |          | 9.03 Telephone lines .....70                                        |          |
|                                                            |          | <b>Price competitiveness in the T&amp;T industry</b>                |          |
|                                                            |          | 10.01 Ticket taxes and airport charges .....94                      |          |
|                                                            |          | 10.04 Fuel price level .....61                                      |          |
|                                                            |          | 10.03 Extent and effect of taxation .....51                         |          |
|                                                            |          | <b>Human resources</b>                                              |          |
|                                                            |          | 11.04 Local availability of research and training services .....107 |          |
|                                                            |          | 11.01 Primary education enrollment .....104                         |          |
|                                                            |          | 11.05 Extent of staff training .....95                              |          |
|                                                            |          | 11.03 Quality of the educational system .....94                     |          |
|                                                            |          | 11.02 Secondary education enrollment .....70                        |          |
|                                                            |          | 11.10 Tuberculosis incidence .....67                                |          |
|                                                            |          | <b>Natural and cultural resources</b>                               |          |
|                                                            |          | 13.04 Business concern for ecosystems .....112                      |          |
|                                                            |          | 13.03 Nationally protected areas .....95                            |          |
|                                                            |          | 13.02 Carbon dioxide damage .....80                                 |          |
|                                                            |          | 13.01 Number of World Heritage sites .....60                        |          |

# Germany

## Key indicators

|                                                           |         |
|-----------------------------------------------------------|---------|
| Population (millions), 2005 .....                         | 82.5    |
| Surface area (1,000 square kilometers) .....              | 357.0   |
| Gross domestic product (US\$ billions), 2005 .....        | 2,791.7 |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 30,579  |
| Real GDP growth (percent), 2005 .....                     | 0.9     |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

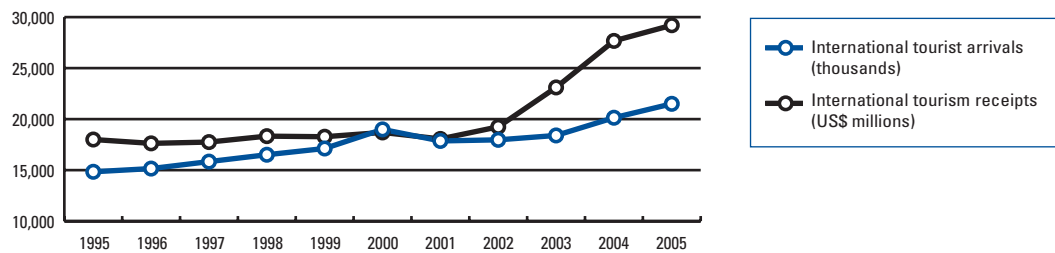
|                               |        | Percent of total | 2007–2016 annual growth (% forecast) |
|-------------------------------|--------|------------------|--------------------------------------|
| GDP (US\$ millions) .....     | 77,952 | 2.7              | 1.8                                  |
| Employment (1,000 jobs) ..... | 1,176  | 3.0              | 0.5                                  |

### T&T economy, 2006 estimates

|                               |         |      |     |
|-------------------------------|---------|------|-----|
| GDP (US\$ millions) .....     | 267,739 | 9.3  | 2.8 |
| Employment (1,000 jobs) ..... | 3,960   | 10.1 | 1.5 |

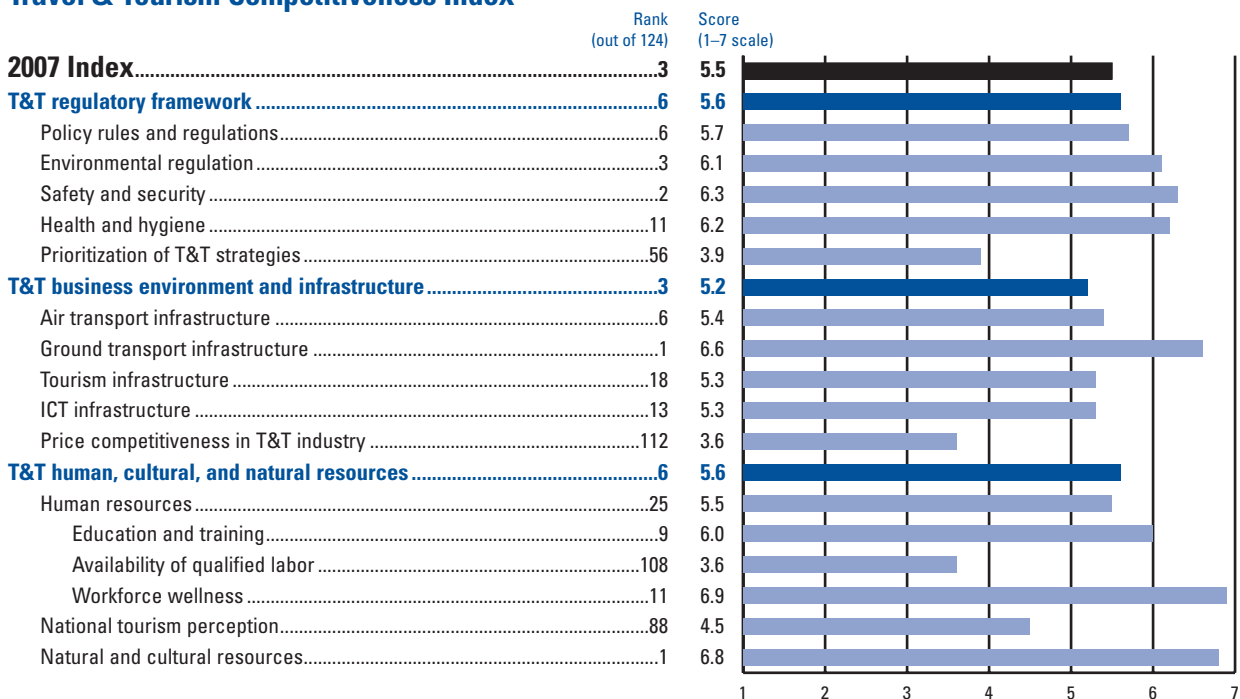
Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |        |
|------------------------------------------------------------|--------|
| International tourist arrivals (1,000), 2005 .....         | 21,500 |
| International tourism receipts (US\$ millions), 2005 ..... | 29,204 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index



Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."



## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                           | Rank/124 | COMPETITIVE DISADVANTAGES                                        | Rank/124 |
|------------------------------------------------------------------|----------|------------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                              |          | <b>Policy rules and regulations</b>                              |          |
| 1.02 Property rights.....1                                       |          | 1.04 Visa requirements .....43                                   |          |
| 1.01 Foreign ownership restrictions.....7                        |          | 1.03 Rules governing foreign direct investment .....19           |          |
|                                                                  |          | 1.05 Openness of bilateral Air Service Agreements .....15        |          |
| <b>Environmental regulation</b>                                  |          | <b>Environmental regulation</b>                                  |          |
| 2.01 Stringency of environmental regulation .....1               |          | 2.03 Government prioritization of sustainable T&T .....16        |          |
| 2.02 Clarity and stability of environmental regulations .....3   |          |                                                                  |          |
| <b>Safety and security</b>                                       |          | <b>Safety and security</b>                                       |          |
| 3.02 Reliability of police services .....2                       |          | 3.01 Business costs of terrorism .....30                         |          |
| 3.03 Business costs of crime and violence.....3                  |          |                                                                  |          |
| <b>Health and hygiene</b>                                        |          | <b>Health and hygiene</b>                                        |          |
| 4.03 Access to improved sanitation .....1                        |          | 4.02 Physician density .....19                                   |          |
| 4.04 Access to improved drinking water .....1                    |          | 4.01 Gov't efforts to reduce health risks from pandemics .....18 |          |
| <b>Prioritization of Travel &amp; Tourism</b>                    |          | <b>Prioritization of Travel &amp; Tourism</b>                    |          |
| 5.04 T&T fair attendance .....4                                  |          | 5.01 Government prioritization of the T&T industry .....111      |          |
|                                                                  |          | 5.02 T&T government expenditure .....82                          |          |
|                                                                  |          | 5.03 Effectiveness of marketing and branding .....64             |          |
| <b>Air transport infrastructure</b>                              |          | <b>Air transport infrastructure</b>                              |          |
| 6.06 International air transport network .....1                  |          | 6.04 Airport density .....61                                     |          |
| 6.01 Quality of air transport infrastructure .....2              |          | 6.03 Departures per 1,000 population.....28                      |          |
| 6.05 Number of operating airlines.....4                          |          |                                                                  |          |
| 6.02 Available seat kilometers.....5                             |          | <b>Tourism infrastructure</b>                                    |          |
| <b>Ground transport infrastructure</b>                           |          | 8.01 Hotel rooms.....22                                          |          |
| 7.04 Domestic transport network .....1                           |          | 8.03 ATMs accepting Visa cards .....13                           |          |
| 7.01 Road infrastructure.....4                                   |          |                                                                  |          |
| 7.02 Railroad infrastructure .....4                              |          | <b>ICT infrastructure</b>                                        |          |
| 7.03 Port infrastructure .....4                                  |          | 9.02 Internet users .....26                                      |          |
| <b>Tourism infrastructure</b>                                    |          | <b>Price competitiveness in the T&amp;T industry</b>             |          |
| 8.02 Presence of major car rental companies.....1                |          | 10.04 Fuel price level .....116                                  |          |
| <b>ICT infrastructure</b>                                        |          | 10.02 Purchasing power parity .....106                           |          |
| 9.03 Telephone lines.....4                                       |          | 10.03 Extent and effect of taxation.....75                       |          |
| 9.01 Extent of business Internet use .....6                      |          | 10.01 Ticket taxes and airport charges.....44                    |          |
| <b>Human resources</b>                                           |          | <b>Human resources</b>                                           |          |
| 11.01 Primary education enrollment .....1                        |          | 11.06 Hiring and firing practices.....119                        |          |
| 11.02 Secondary education enrollment.....1                       |          | 11.07 Ease of hiring foreign labor .....58                       |          |
| 11.04 Local availability of research and training services.....1 |          | 11.03 Quality of the educational system .....33                  |          |
| 11.09 Malaria incidence.....1                                    |          | 11.08 HIV prevalence .....25                                     |          |
| 11.05 Extent of staff training.....7                             |          | 11.11 Life expectancy .....15                                    |          |
| <b>Natural and cultural resources</b>                            |          | 11.10 Tuberculosis incidence .....14                             |          |
| 13.05 Risk of malaria and yellow fever .....1                    |          | <b>National tourism perception</b>                               |          |
| 13.01 Number of World Heritage sites .....4                      |          | 12.03 Recommendation to extend business trips .....83            |          |
| 13.04 Business concern for ecosystems .....4                     |          | 12.01 Tourism openness .....64                                   |          |
| 13.03 Nationally protected areas.....5                           |          | 12.02 Attitude toward tourists .....61                           |          |
|                                                                  |          | <b>Natural and cultural resources</b>                            |          |
|                                                                  |          | 13.02 Carbon dioxide damage.....22                               |          |

# Greece

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 11.1   |
| Surface area (1,000 square kilometers) .....              | 132.0  |
| Gross domestic product (US\$ billions), 2005 .....        | 225.6  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 22,392 |
| Real GDP growth (percent), 2005 .....                     | 3.7    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

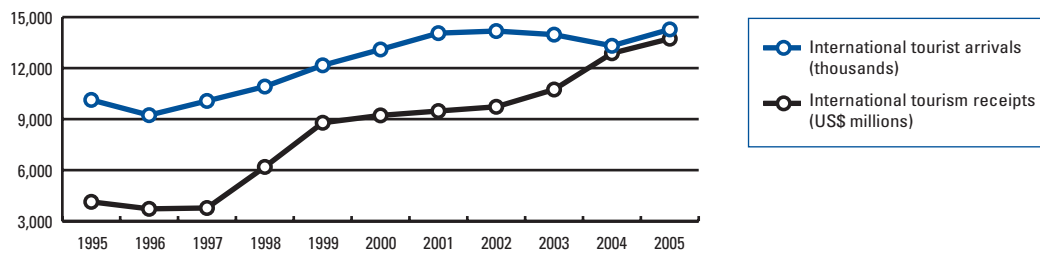
|                               |        | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|--------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 15,288 | 6.5                 | 3.3                                         |
| Employment (1,000 jobs) ..... | 295    | 6.7                 | 0.9                                         |

### T&T economy, 2006 estimates

|                               |        |      |     |
|-------------------------------|--------|------|-----|
| GDP (US\$ millions) .....     | 35,631 | 15.1 | 3.7 |
| Employment (1,000 jobs) ..... | 699    | 15.9 | 1.5 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |        |
|------------------------------------------------------------|--------|
| International tourist arrivals (1,000), 2005 .....         | 14,276 |
| International tourism receipts (US\$ millions), 2005 ..... | 13,731 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index .....</b>                                      | <b>24</b>            | <b>5.0</b>           |
| <b>T&amp;T regulatory framework .....</b>                    | <b>20</b>            | <b>5.2</b>           |
| Policy rules and regulations .....                           | 57                   | 4.8                  |
| Environmental regulation .....                               | 45                   | 4.4                  |
| Safety and security .....                                    | 18                   | 5.5                  |
| Health and hygiene .....                                     | 3                    | 6.5                  |
| Prioritization of T&T strategies .....                       | 22                   | 4.9                  |
| <b>T&amp;T business environment and infrastructure .....</b> | <b>32</b>            | <b>4.4</b>           |
| Air transport infrastructure .....                           | 37                   | 3.7                  |
| Ground transport infrastructure .....                        | 34                   | 4.4                  |
| Tourism infrastructure .....                                 | 7                    | 6.0                  |
| ICT infrastructure .....                                     | 38                   | 3.6                  |
| Price competitiveness in T&T industry .....                  | 103                  | 4.0                  |
| <b>T&amp;T human, cultural, and natural resources .....</b>  | <b>15</b>            | <b>5.4</b>           |
| Human resources .....                                        | 55                   | 5.2                  |
| Education and training .....                                 | 47                   | 5.0                  |
| Availability of qualified labor .....                        | 96                   | 3.8                  |
| Workforce wellness .....                                     | 21                   | 6.8                  |
| National tourism perception .....                            | 23                   | 5.7                  |
| Natural and cultural resources .....                         | 23                   | 5.3                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                  | Rank/124 | COMPETITIVE DISADVANTAGES                                       | Rank/124 |
|---------------------------------------------------------|----------|-----------------------------------------------------------------|----------|
| <b>Safety and security</b>                              |          | <b>Policy rules and regulations</b>                             |          |
| 3.03 Business costs of crime and violence.....          | 16       | 1.03 Rules governing foreign direct investment .....            | 89       |
| <b>Health and hygiene</b>                               |          | 1.01 Foreign ownership restrictions.....                        | 61       |
| 4.03 Access to improved sanitation .....                | 1        | 1.05 Openness of bilateral Air Service Agreements .....         | 50       |
| 4.04 Access to improved drinking water .....            | 1        | 1.04 Visa requirements .....                                    | 43       |
| 4.02 Physician density .....                            | 3        | 1.02 Property rights.....                                       | 37       |
| <b>Prioritization of Travel &amp; Tourism</b>           |          | <b>Environmental regulation</b>                                 |          |
| 5.04 T&T fair attendance.....                           | 4        | 2.02 Clarity and stability of environmental regulations .....   | 55       |
| 5.01 Government prioritization of the T&T industry..... | 18       | 2.01 Stringency of environmental regulation .....               | 50       |
| <b>Tourism infrastructure</b>                           |          | 2.03 Government prioritization of sustainable T&T.....          | 24       |
| 8.02 Presence of major car rental companies.....        | 1        | <b>Safety and security</b>                                      |          |
| 8.01 Hotel rooms.....                                   | 4        | 3.02 Reliability of police services .....                       | 34       |
| 8.03 ATMs accepting Visa cards .....                    | 20       | 3.01 Business costs of terrorism .....                          | 24       |
| <b>ICT infrastructure</b>                               |          | <b>Health and hygiene</b>                                       |          |
| 9.03 Telephone lines.....                               | 11       | 4.01 Gov't efforts to reduce health risks from pandemics .....  | 25       |
| <b>Price competitiveness in the T&amp;T industry</b>    |          | <b>Prioritization of Travel &amp; Tourism</b>                   |          |
| 10.01 Ticket taxes and airport charges.....             | 9        | 5.02 T&T government expenditure .....                           | 49       |
| <b>Human resources</b>                                  |          | 5.03 Effectiveness of marketing and branding .....              | 32       |
| 11.01 Primary education enrollment .....                | 1        | <b>Air transport infrastructure</b>                             |          |
| 11.09 Malaria incidence.....                            | 1        | 6.04 Airport density .....                                      | 59       |
| 11.11 Life expectancy .....                             | 15       | 6.06 International air transport network .....                  | 40       |
| <b>National tourism perception</b>                      |          | 6.01 Quality of air transport infrastructure .....              | 36       |
| 12.03 Recommendation to extend business trips .....     | 11       | 6.02 Available seat kilometers.....                             | 31       |
| 12.01 Tourism openness.....                             | 18       | 6.03 Departures per 1,000 population.....                       | 27       |
| 12.02 Attitude toward tourists .....                    | 23       | 6.05 Number of operating airlines.....                          | 24       |
| <b>Natural and cultural resources</b>                   |          | <b>Ground transport infrastructure</b>                          |          |
| 13.05 Risk of malaria and yellow fever .....            | 1        | 7.02 Railroad infrastructure .....                              | 44       |
| 13.01 Number of World Heritage sites .....              | 12       | 7.01 Road infrastructure.....                                   | 42       |
|                                                         |          | 7.03 Port infrastructure .....                                  | 41       |
|                                                         |          | 7.04 Domestic transport network .....                           | 29       |
|                                                         |          | <b>ICT infrastructure</b>                                       |          |
|                                                         |          | 9.01 Extent of business Internet use .....                      | 88       |
|                                                         |          | 9.02 Internet users .....                                       | 51       |
|                                                         |          | <b>Price competitiveness in the T&amp;T industry</b>            |          |
|                                                         |          | 10.04 Fuel price level .....                                    | 113      |
|                                                         |          | 10.02 Purchasing power parity.....                              | 94       |
|                                                         |          | 10.03 Extent and effect of taxation.....                        | 76       |
|                                                         |          | <b>Human resources</b>                                          |          |
|                                                         |          | 11.06 Hiring and firing practices.....                          | 108      |
|                                                         |          | 11.03 Quality of the educational system .....                   | 60       |
|                                                         |          | 11.04 Local availability of research and training services..... | 59       |
|                                                         |          | 11.07 Ease of hiring foreign labor .....                        | 57       |
|                                                         |          | 11.05 Extent of staff training.....                             | 52       |
|                                                         |          | 11.08 HIV prevalence .....                                      | 48       |
|                                                         |          | 11.02 Secondary education enrollment.....                       | 38       |
|                                                         |          | 11.10 Tuberculosis incidence .....                              | 31       |
|                                                         |          | <b>Natural and cultural resources</b>                           |          |
|                                                         |          | 13.03 Nationally protected areas.....                           | 90       |
|                                                         |          | 13.04 Business concern for ecosystems .....                     | 48       |
|                                                         |          | 13.02 Carbon dioxide damage.....                                | 43       |

# Guatemala

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 12.6  |
| Surface area (1,000 square kilometers) .....              | 108.9 |
| Gross domestic product (US\$ billions), 2005 .....        | 27.4  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 4,155 |
| Real GDP growth (percent), 2005 .....                     | 3.2   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

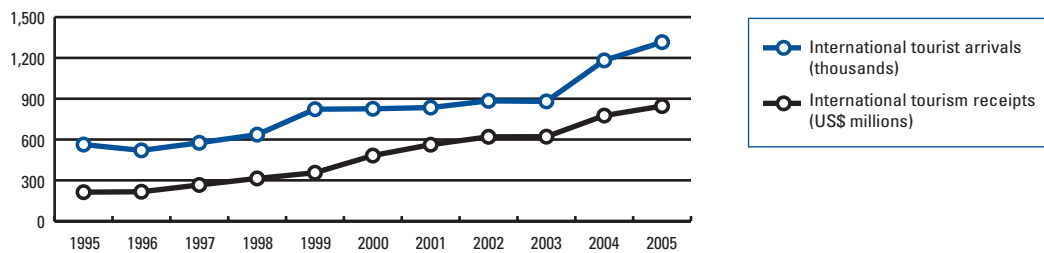
|                               |       | Percent<br>of total | 2007–2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 1,004 | 2.9                 | 4.0                                         |
| Employment (1,000 jobs) ..... | 123   | 2.5                 | 3.8                                         |

### T&T economy, 2006 estimates

|                               |       |     |     |
|-------------------------------|-------|-----|-----|
| GDP (US\$ millions) .....     | 2,311 | 6.6 | 4.1 |
| Employment (1,000 jobs) ..... | 279   | 5.7 | 4.0 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 1,316 |
| International tourism receipts (US\$ millions), 2005 ..... | 846   |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1–7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>69</b>            | <b>4.0</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>68</b>            | <b>4.1</b>           |
| Policy rules and regulations .....                           | 18                   | 5.4                  |
| Environmental regulation .....                               | 79                   | 3.7                  |
| Safety and security .....                                    | 114                  | 3.2                  |
| Health and hygiene .....                                     | 76                   | 4.2                  |
| Prioritization of T&T strategies .....                       | 38                   | 4.2                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>76</b>            | <b>3.2</b>           |
| Air transport infrastructure .....                           | 55                   | 3.2                  |
| Ground transport infrastructure .....                        | 73                   | 3.1                  |
| Tourism infrastructure .....                                 | 76                   | 2.6                  |
| ICT infrastructure .....                                     | 71                   | 2.5                  |
| Price competitiveness in T&T industry .....                  | 74                   | 4.4                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>69</b>            | <b>4.7</b>           |
| Human resources .....                                        | 78                   | 4.9                  |
| Education and training .....                                 | 93                   | 4.1                  |
| Availability of qualified labor .....                        | 39                   | 4.7                  |
| Workforce wellness .....                                     | 77                   | 6.1                  |
| National tourism perception .....                            | 74                   | 4.7                  |
| Natural and cultural resources .....                         | 56                   | 4.5                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                   | Rank/124 | COMPETITIVE DISADVANTAGES                                        | Rank/124 |
|----------------------------------------------------------|----------|------------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                      |          | <b>Policy rules and regulations</b>                              |          |
| 1.05 Openness of bilateral Air Service Agreements .....  | 3        | 1.02 Property rights .....                                       | 73       |
| 1.04 Visa requirements .....                             | 43       | 1.03 Rules governing foreign direct investment .....             | 70       |
| <b>Health and hygiene</b>                                |          | 1.01 Foreign ownership restrictions .....                        | 62       |
| 4.04 Access to improved drinking water .....             | 45       | <b>Environmental regulation</b>                                  |          |
| <b>Prioritization of Travel &amp; Tourism</b>            |          | 2.02 Clarity and stability of environmental regulations .....    | 88       |
| 5.04 T&T fair attendance .....                           | 35       | 2.01 Stringency of environmental regulation .....                | 78       |
| 5.02 T&T government expenditure .....                    | 36       | 2.03 Government prioritization of sustainable T&T .....          | 69       |
| 5.01 Government prioritization of the T&T industry ..... | 48       | <b>Safety and security</b>                                       |          |
| 5.03 Effectiveness of marketing and branding .....       | 50       | 3.03 Business costs of crime and violence .....                  | 121      |
| <b>Air transport infrastructure</b>                      |          | 3.02 Reliability of police services .....                        | 114      |
| 6.04 Airport density .....                               | 10       | 3.01 Business costs of terrorism .....                           | 86       |
| <b>ICT infrastructure</b>                                |          | <b>Health and hygiene</b>                                        |          |
| 9.01 Extent of business Internet use .....               | 39       | 4.01 Gov't efforts to reduce health risks from pandemics .....   | 98       |
| <b>Price competitiveness in the T&amp;T industry</b>     |          | 4.02 Physician density .....                                     | 81       |
| 10.03 Extent and effect of taxation .....                | 37       | 4.03 Access to improved sanitation .....                         | 74       |
| <b>Human resources</b>                                   |          | <b>Air transport infrastructure</b>                              |          |
| 11.01 Primary education enrollment .....                 | 1        | 6.03 Departures per 1,000 population .....                       | 88       |
| 11.06 Hiring and firing practices .....                  | 28       | 6.02 Available seat kilometers .....                             | 77       |
| <b>National tourism perception</b>                       |          | 6.05 Number of operating airlines .....                          | 77       |
| 12.03 Recommendation to extend business trips .....      | 32       | 6.01 Quality of air transport infrastructure .....               | 66       |
| <b>Natural and cultural resources</b>                    |          | 6.06 International air transport network .....                   | 58       |
| 13.03 Nationally protected areas .....                   | 16       | <b>Ground transport infrastructure</b>                           |          |
| 13.02 Carbon dioxide damage .....                        | 31       | 7.02 Railroad infrastructure .....                               | 112      |
|                                                          |          | 7.04 Domestic transport network .....                            | 85       |
|                                                          |          | 7.03 Port infrastructure .....                                   | 59       |
|                                                          |          | 7.01 Road infrastructure .....                                   | 57       |
|                                                          |          | <b>Tourism infrastructure</b>                                    |          |
|                                                          |          | 8.03 ATMs accepting Visa cards .....                             | 79       |
|                                                          |          | 8.01 Hotel rooms .....                                           | 74       |
|                                                          |          | 8.02 Presence of major car rental companies .....                | 55       |
|                                                          |          | <b>ICT infrastructure</b>                                        |          |
|                                                          |          | 9.03 Telephone lines .....                                       | 83       |
|                                                          |          | 9.02 Internet users .....                                        | 80       |
|                                                          |          | <b>Price competitiveness in the T&amp;T industry</b>             |          |
|                                                          |          | 10.01 Ticket taxes and airport charges .....                     | 112      |
|                                                          |          | 10.02 Purchasing power parity .....                              | 68       |
|                                                          |          | 10.04 Fuel price level .....                                     | 55       |
|                                                          |          | <b>Human resources</b>                                           |          |
|                                                          |          | 11.03 Quality of the educational system .....                    | 111      |
|                                                          |          | 11.02 Secondary education enrollment .....                       | 98       |
|                                                          |          | 11.09 Malaria incidence .....                                    | 97       |
|                                                          |          | 11.08 HIV prevalence .....                                       | 90       |
|                                                          |          | 11.11 Life expectancy .....                                      | 79       |
|                                                          |          | 11.10 Tuberculosis incidence .....                               | 75       |
|                                                          |          | 11.05 Extent of staff training .....                             | 73       |
|                                                          |          | 11.07 Ease of hiring foreign labor .....                         | 64       |
|                                                          |          | 11.04 Local availability of research and training services ..... | 55       |
|                                                          |          | <b>National tourism perception</b>                               |          |
|                                                          |          | 12.02 Attitude toward tourists .....                             | 96       |
|                                                          |          | 12.01 Tourism openness .....                                     | 58       |
|                                                          |          | <b>Natural and cultural resources</b>                            |          |
|                                                          |          | 13.05 Risk of malaria and yellow fever .....                     | 83       |
|                                                          |          | 13.01 Number of World Heritage sites .....                       | 60       |
|                                                          |          | 13.04 Business concern for ecosystems .....                      | 59       |

# Guyana

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 0.8   |
| Surface area (1,000 square kilometers) .....              | 215.0 |
| Gross domestic product (US\$ billions), 2005 .....        | 0.8   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 4,612 |
| Real GDP growth (percent), 2005 .....                     | -3.0  |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

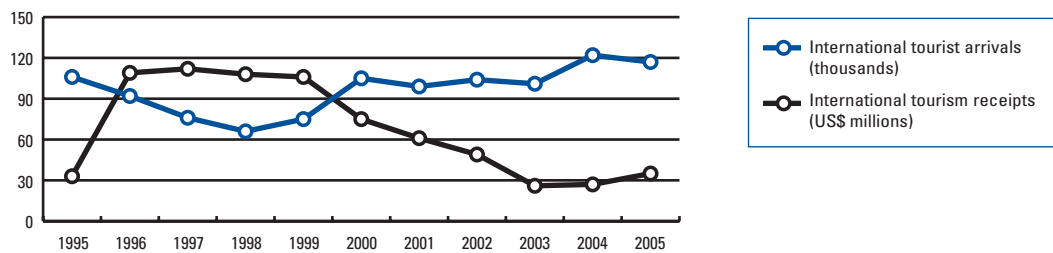
|                               |    | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|----|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 18 | 2.1                 | 3.5                                         |
| Employment (1,000 jobs) ..... | 5  | 1.7                 | 2.7                                         |

### T&T economy, 2006 estimates

|                               |    |     |     |
|-------------------------------|----|-----|-----|
| GDP (US\$ millions) .....     | 66 | 7.9 | 3.1 |
| Employment (1,000 jobs) ..... | 21 | 6.5 | 2.3 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2005 .....         | 117 |
| International tourism receipts (US\$ millions), 2005 ..... | 35  |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index .....</b>                                      | <b>100</b>           | <b>3.6</b>           |
| <b>T&amp;T regulatory framework .....</b>                    | <b>96</b>            | <b>3.7</b>           |
| Policy rules and regulations .....                           | 79                   | 4.3                  |
| Environmental regulation .....                               | 93                   | 3.4                  |
| Safety and security .....                                    | 124                  | 2.4                  |
| Health and hygiene .....                                     | 87                   | 4.1                  |
| Prioritization of T&T strategies .....                       | 41                   | 4.2                  |
| <b>T&amp;T business environment and infrastructure .....</b> | <b>88</b>            | <b>2.9</b>           |
| Air transport infrastructure .....                           | 69                   | 2.8                  |
| Ground transport infrastructure .....                        | 92                   | 2.6                  |
| Tourism infrastructure .....                                 | 80                   | 2.5                  |
| ICT infrastructure .....                                     | 65                   | 2.5                  |
| Price competitiveness in T&T industry .....                  | 90                   | 4.2                  |
| <b>T&amp;T human, cultural, and natural resources .....</b>  | <b>109</b>           | <b>4.1</b>           |
| Human resources .....                                        | 95                   | 4.6                  |
| Education and training .....                                 | 102                  | 3.9                  |
| Availability of qualified labor .....                        | 23                   | 5.0                  |
| Workforce wellness .....                                     | 100                  | 5.0                  |
| National tourism perception .....                            | 68                   | 4.7                  |
| Natural and cultural resources .....                         | 121                  | 2.9                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               | Rank/124 | COMPETITIVE DISADVANTAGES                                           | Rank/124 |
|------------------------------------------------------|----------|---------------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                  |          | <b>Policy rules and regulations</b>                                 |          |
| 1.04 Visa requirements .....1                        |          | 1.02 Property rights .....112                                       |          |
|                                                      |          | 1.05 Openness of bilateral Air Service Agreements .....101          |          |
| <b>Prioritization of Travel &amp; Tourism</b>        |          | 1.03 Rules governing foreign direct investment .....98              |          |
| 5.02 T&T government expenditure .....23              |          | 1.01 Foreign ownership restrictions .....92                         |          |
| 5.04 T&T fair attendance .....48                     |          |                                                                     |          |
|                                                      |          | <b>Environmental regulation</b>                                     |          |
| <b>Air transport infrastructure</b>                  |          | 2.02 Clarity and stability of environmental regulations .....100    |          |
| 6.04 Airport density .....6                          |          | 2.01 Stringency of environmental regulation .....98                 |          |
|                                                      |          | 2.03 Government prioritization of sustainable T&T .....77           |          |
| <b>ICT infrastructure</b>                            |          |                                                                     |          |
| 9.02 Internet users .....50                          |          | <b>Safety and security</b>                                          |          |
|                                                      |          | 3.02 Reliability of police services .....124                        |          |
| <b>Price competitiveness in the T&amp;T industry</b> |          | 3.03 Business costs of crime and violence .....124                  |          |
| 10.02 Purchasing power parity .....12                |          | 3.01 Business costs of terrorism .....116                           |          |
| 10.04 Fuel price level .....49                       |          |                                                                     |          |
|                                                      |          | <b>Health and hygiene</b>                                           |          |
| <b>Human resources</b>                               |          | 4.02 Physician density .....94                                      |          |
| 11.01 Primary education enrollment .....1            |          | 4.01 Gov't efforts to reduce health risks from pandemics .....84    |          |
| 11.06 Hiring and firing practices .....24            |          | 4.04 Access to improved drinking water .....74                      |          |
| 11.07 Ease of hiring foreign labor .....31           |          | 4.03 Access to improved sanitation .....65                          |          |
|                                                      |          |                                                                     |          |
| <b>National tourism perception</b>                   |          | <b>Prioritization of Travel &amp; Tourism</b>                       |          |
| 12.01 Tourism openness .....44                       |          | 5.03 Effectiveness of marketing and branding .....74                |          |
| 12.02 Attitude toward tourists .....47               |          | 5.01 Government prioritization of the T&T industry .....51          |          |
|                                                      |          |                                                                     |          |
|                                                      |          | <b>Air transport infrastructure</b>                                 |          |
|                                                      |          | 6.05 Number of operating airlines .....117                          |          |
|                                                      |          | 6.02 Available seat kilometers .....114                             |          |
|                                                      |          | 6.01 Quality of air transport infrastructure .....105               |          |
|                                                      |          | 6.06 International air transport network .....103                   |          |
|                                                      |          | 6.03 Departures per 1,000 population .....94                        |          |
|                                                      |          |                                                                     |          |
|                                                      |          | <b>Ground transport infrastructure</b>                              |          |
|                                                      |          | 7.02 Railroad infrastructure .....104                               |          |
|                                                      |          | 7.04 Domestic transport network .....103                            |          |
|                                                      |          | 7.03 Port infrastructure .....92                                    |          |
|                                                      |          | 7.01 Road infrastructure .....78                                    |          |
|                                                      |          |                                                                     |          |
|                                                      |          | <b>Tourism infrastructure</b>                                       |          |
|                                                      |          | 8.03 ATMs accepting Visa cards .....115                             |          |
|                                                      |          | 8.01 Hotel rooms .....85                                            |          |
|                                                      |          | 8.02 Presence of major car rental companies .....55                 |          |
|                                                      |          |                                                                     |          |
|                                                      |          | <b>ICT infrastructure</b>                                           |          |
|                                                      |          | 9.01 Extent of business Internet use .....92                        |          |
|                                                      |          | 9.03 Telephone lines .....72                                        |          |
|                                                      |          |                                                                     |          |
|                                                      |          | <b>Price competitiveness in the T&amp;T industry</b>                |          |
|                                                      |          | 10.01 Ticket taxes and airport charges .....121                     |          |
|                                                      |          | 10.03 Extent and effect of taxation .....107                        |          |
|                                                      |          |                                                                     |          |
|                                                      |          | <b>Human resources</b>                                              |          |
|                                                      |          | 11.04 Local availability of research and training services .....113 |          |
|                                                      |          | 11.09 Malaria incidence .....109                                    |          |
|                                                      |          | 11.08 HIV prevalence .....104                                       |          |
|                                                      |          | 11.05 Extent of staff training .....97                              |          |
|                                                      |          | 11.11 Life expectancy .....93                                       |          |
|                                                      |          | 11.10 Tuberculosis incidence .....85                                |          |
|                                                      |          | 11.03 Quality of the educational system .....77                     |          |
|                                                      |          |                                                                     |          |
|                                                      |          | <b>National tourism perception</b>                                  |          |
|                                                      |          | 12.03 Recommendation to extend business trips .....96               |          |

(Disadvantages cont'd. from bottom of right column)

&lt;&lt;&lt; (Cont'd. on bottom of left column)



# Honduras

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 7.2   |
| Surface area (1,000 square kilometers) .....              | 112.1 |
| Gross domestic product (US\$ billions), 2005 .....        | 8.3   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 3,009 |
| Real GDP growth (percent), 2005 .....                     | 4.2   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

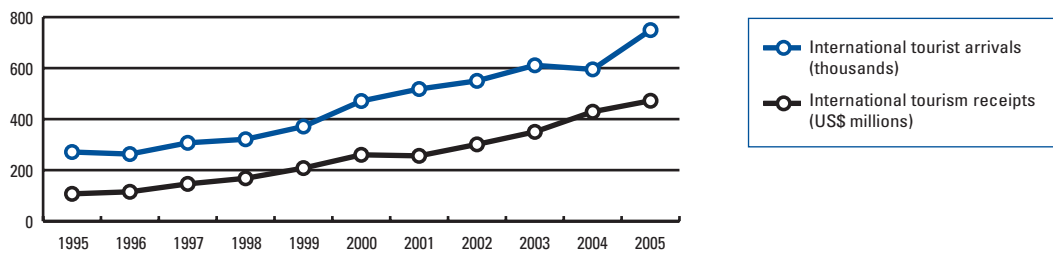
|                               |     | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-----|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 332 | 3.8                 | 3.6                                         |
| Employment (1,000 jobs) ..... | 80  | 3.1                 | 3.0                                         |

### T&T economy, 2006 estimates

|                               |     |     |     |
|-------------------------------|-----|-----|-----|
| GDP (US\$ millions) .....     | 850 | 9.6 | 3.5 |
| Employment (1,000 jobs) ..... | 205 | 7.9 | 3.0 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2005 .....         | 749 |
| International tourism receipts (US\$ millions), 2005 ..... | 472 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index .....</b>                                      | <b>88</b>            | <b>3.8</b>           |
| <b>T&amp;T regulatory framework .....</b>                    | <b>83</b>            | <b>3.9</b>           |
| Policy rules and regulations .....                           | 37                   | 5.1                  |
| Environmental regulation .....                               | 87                   | 3.5                  |
| Safety and security .....                                    | 113                  | 3.2                  |
| Health and hygiene .....                                     | 83                   | 4.1                  |
| Prioritization of T&T strategies .....                       | 70                   | 3.7                  |
| <b>T&amp;T business environment and infrastructure .....</b> | <b>83</b>            | <b>3.0</b>           |
| Air transport infrastructure .....                           | 74                   | 2.8                  |
| Ground transport infrastructure .....                        | 75                   | 3.1                  |
| Tourism infrastructure .....                                 | 82                   | 2.4                  |
| ICT infrastructure .....                                     | 90                   | 2.0                  |
| Price competitiveness in T&T industry .....                  | 68                   | 4.5                  |
| <b>T&amp;T human, cultural, and natural resources .....</b>  | <b>91</b>            | <b>4.4</b>           |
| Human resources .....                                        | 82                   | 4.9                  |
| Education and training .....                                 | 95                   | 4.1                  |
| Availability of qualified labor .....                        | 55                   | 4.5                  |
| Workforce wellness .....                                     | 80                   | 6.0                  |
| National tourism perception .....                            | 63                   | 4.8                  |
| Natural and cultural resources .....                         | 97                   | 3.6                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                     | Rank/124 | COMPETITIVE DISADVANTAGES                                          | Rank/124 |
|------------------------------------------------------------|----------|--------------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                        |          | <b>Policy rules and regulations</b>                                |          |
| 1.05 Openness of bilateral Air Service Agreements .....2   |          | 1.02 Property rights .....104                                      |          |
| 1.04 Visa requirements .....43                             |          | 1.01 Foreign ownership restrictions .....86                        |          |
|                                                            |          | 1.03 Rules governing foreign direct investment .....80             |          |
| <b>Prioritization of Travel &amp; Tourism</b>              |          | <b>Environmental regulation</b>                                    |          |
| 5.02 T&T government expenditure .....42                    |          | 2.02 Clarity and stability of environmental regulations .....106   |          |
| 5.01 Government prioritization of the T&T industry .....44 |          | 2.01 Stringency of environmental regulation .....84                |          |
|                                                            |          | 2.03 Government prioritization of sustainable T&T .....75          |          |
| <b>Air transport infrastructure</b>                        |          | <b>Safety and security</b>                                         |          |
| 6.04 Airport density .....37                               |          | 3.03 Business costs of crime and violence .....119                 |          |
| <b>Ground transport infrastructure</b>                     |          | 3.02 Reliability of police services .....102                       |          |
| 7.03 Port infrastructure .....45                           |          | 3.01 Business costs of terrorism .....92                           |          |
| <b>Price competitiveness in the T&amp;T industry</b>       |          | <b>Health and hygiene</b>                                          |          |
| 10.02 Purchasing power parity .....43                      |          | 4.01 Gov't efforts to reduce health risks from pandemics .....105  |          |
| <b>Human resources</b>                                     |          | 4.02 Physician density .....89                                     |          |
| 11.01 Primary education enrollment .....1                  |          | 4.03 Access to improved sanitation .....66                         |          |
|                                                            |          | 4.04 Access to improved drinking water .....62                     |          |
| <b>National tourism perception</b>                         |          | <b>Prioritization of Travel &amp; Tourism</b>                      |          |
| 12.01 Tourism openness .....29                             |          | 5.04 T&T fair attendance .....90                                   |          |
|                                                            |          | 5.03 Effectiveness of marketing and branding .....62               |          |
|                                                            |          | <b>Air transport infrastructure</b>                                |          |
|                                                            |          | 6.05 Number of operating airlines .....102                         |          |
|                                                            |          | 6.02 Available seat kilometers .....99                             |          |
|                                                            |          | 6.06 International air transport network .....85                   |          |
|                                                            |          | 6.01 Quality of air transport infrastructure .....77               |          |
|                                                            |          | <b>Ground transport infrastructure</b>                             |          |
|                                                            |          | 7.02 Railroad infrastructure .....121                              |          |
|                                                            |          | 7.04 Domestic transport network .....89                            |          |
|                                                            |          | 7.01 Road infrastructure .....74                                   |          |
|                                                            |          | <b>Tourism infrastructure</b>                                      |          |
|                                                            |          | 8.03 ATMs accepting Visa cards .....90                             |          |
|                                                            |          | 8.02 Presence of major car rental companies .....66                |          |
|                                                            |          | 8.01 Hotel rooms .....63                                           |          |
|                                                            |          | <b>ICT infrastructure</b>                                          |          |
|                                                            |          | 9.02 Internet users .....95                                        |          |
|                                                            |          | 9.03 Telephone lines .....92                                       |          |
|                                                            |          | 9.01 Extent of business Internet use .....78                       |          |
|                                                            |          | <b>Price competitiveness in the T&amp;T industry</b>               |          |
|                                                            |          | 10.01 Ticket taxes and airport charges .....99                     |          |
|                                                            |          | 10.03 Extent and effect of taxation .....68                        |          |
|                                                            |          | 10.04 Fuel price level .....60                                     |          |
|                                                            |          | <b>Human resources</b>                                             |          |
|                                                            |          | 11.03 Quality of the educational system .....118                   |          |
|                                                            |          | 11.08 HIV prevalence .....101                                      |          |
|                                                            |          | 11.05 Extent of staff training .....93                             |          |
|                                                            |          | 11.09 Malaria incidence .....91                                    |          |
|                                                            |          | 11.02 Secondary education enrollment .....89                       |          |
|                                                            |          | 11.04 Local availability of research and training services .....84 |          |
|                                                            |          | 11.11 Life expectancy .....83                                      |          |
|                                                            |          | 11.10 Tuberculosis incidence .....70                               |          |
|                                                            |          | 11.06 Hiring and firing practices .....55                          |          |
|                                                            |          | 11.07 Ease of hiring foreign labor .....53                         |          |

(Disadvantages cont'd. from bottom of right column)

| COMPETITIVE DISADVANTAGES                             | Rank/124 |
|-------------------------------------------------------|----------|
| <b>National tourism perception</b>                    |          |
| 12.02 Attitude toward tourists .....102               |          |
| 12.03 Recommendation to extend business trips .....85 |          |
| <b>Natural and cultural resources</b>                 |          |
| 13.04 Business concern for ecosystems .....86         |          |
| 13.05 Risk of malaria and yellow fever .....83        |          |
| 13.01 Number of World Heritage sites .....73          |          |
| 13.02 Carbon dioxide damage .....72                   |          |
| 13.03 Nationally protected areas .....68              |          |

&lt;&lt;&lt; (Cont'd. on bottom of left column)

# Hong Kong SAR

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 6.9    |
| Surface area (1,000 square kilometers) .....              | 1.1    |
| Gross domestic product (US\$ billions), 2005 .....        | 177.7  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 33,479 |
| Real GDP growth (percent), 2005 .....                     | 7.3    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

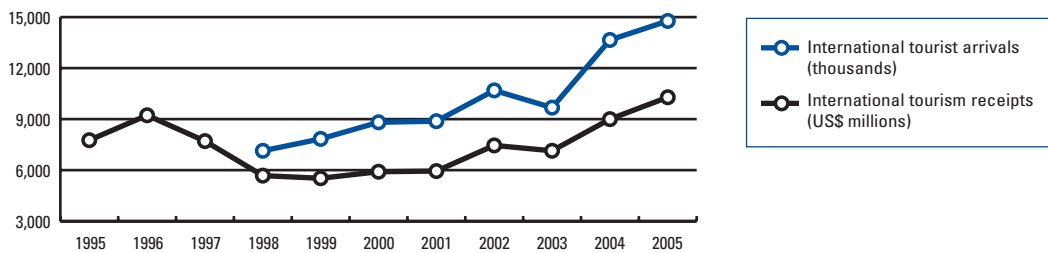
|                               |       | Percent of total | 2007-2016 annual growth (% forecast) |
|-------------------------------|-------|------------------|--------------------------------------|
| GDP (US\$ millions) .....     | 6,519 | 3.3              | 5.9                                  |
| Employment (1,000 jobs) ..... | 168   | 4.8              | 2.2                                  |

### T&T economy, 2006 estimates

|                               |        |      |     |
|-------------------------------|--------|------|-----|
| GDP (US\$ millions) .....     | 33,226 | 17.1 | 6.9 |
| Employment (1,000 jobs) ..... | 549    | 15.9 | 3.4 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |        |
|------------------------------------------------------------|--------|
| International tourist arrivals (1,000), 2005 .....         | 14,773 |
| International tourism receipts (US\$ millions), 2005 ..... | 10,286 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank (out of 124) | Score (1-7 scale) |
|--------------------------------------------------------------|-------------------|-------------------|
| <b>2007 Index</b> .....                                      | <b>6</b>          | <b>5.3</b>        |
| <b>T&amp;T regulatory framework</b> .....                    | <b>4</b>          | <b>5.7</b>        |
| Policy rules and regulations .....                           | 2                 | 5.8               |
| Environmental regulation .....                               | 24                | 5.1               |
| Safety and security .....                                    | 6                 | 6.1               |
| Health and hygiene .....                                     | 1                 | 6.6               |
| Prioritization of T&T strategies .....                       | 13                | 5.2               |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>14</b>         | <b>4.8</b>        |
| Air transport infrastructure .....                           | 12                | 4.8               |
| Ground transport infrastructure .....                        | 2                 | 6.5               |
| Tourism infrastructure .....                                 | 70                | 2.8               |
| ICT infrastructure .....                                     | 16                | 5.0               |
| Price competitiveness in T&T industry .....                  | 31                | 5.0               |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>14</b>         | <b>5.4</b>        |
| Human resources .....                                        | 7                 | 5.9               |
| Education and training .....                                 | 21                | 5.7               |
| Availability of qualified labor .....                        | 13                | 5.3               |
| Workforce wellness .....                                     | 29                | 6.8               |
| National tourism perception .....                            | 27                | 5.6               |
| Natural and cultural resources .....                         | 39                | 4.8               |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                         | Rank/124 | COMPETITIVE DISADVANTAGES                                       | Rank/124 |
|----------------------------------------------------------------|----------|-----------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                            |          | <b>Policy rules and regulations</b>                             |          |
| 1.03 Rules governing foreign direct investment .....           | 3        | 1.05 Openness of bilateral Air Service Agreements .....         | 24       |
| 1.01 Foreign ownership restrictions.....                       | 4        | 1.04 Visa requirements .....                                    | 15       |
| <b>Environmental regulation</b>                                |          | 1.02 Property rights.....                                       | 14       |
| 2.03 Government prioritization of sustainable T&T .....        | 6        | <b>Environmental regulation</b>                                 |          |
| <b>Safety and security</b>                                     |          | 2.01 Stringency of environmental regulation .....               | 34       |
| 3.03 Business costs of crime and violence.....                 | 8        | 2.02 Clarity and stability of environmental regulations .....   | 25       |
| 3.02 Reliability of police services .....                      | 9        | <b>Safety and security</b>                                      |          |
| <b>Health and hygiene</b>                                      |          | 3.01 Business costs of terrorism .....                          | 25       |
| 4.03 Access to improved sanitation .....                       | 1        | <b>Prioritization of Travel &amp; Tourism</b>                   |          |
| 4.04 Access to improved drinking water .....                   | 1        | 5.04 T&T fair attendance.....                                   | 48       |
| 4.01 Gov't efforts to reduce health risks from pandemics ..... | 4        | 5.02 T&T government expenditure .....                           | 15       |
| <b>Prioritization of Travel &amp; Tourism</b>                  |          | <b>Air transport infrastructure</b>                             |          |
| 5.03 Effectiveness of marketing and branding .....             | 4        | 6.04 Airport density .....                                      | 118      |
| 5.01 Government prioritization of the T&T industry.....        | 5        | 6.05 Number of operating airlines.....                          | 22       |
| <b>Air transport infrastructure</b>                            |          | 6.02 Available seat kilometers.....                             | 11       |
| 6.01 Quality of air transport infrastructure .....             | 3        | <b>Tourism infrastructure</b>                                   |          |
| 6.06 International air transport network .....                 | 5        | 8.02 Presence of major car rental companies.....                | 102      |
| <b>Ground transport infrastructure</b>                         |          | 8.01 Hotel rooms.....                                           | 39       |
| 7.03 Port infrastructure .....                                 | 3        | 8.03 ATMs accepting Visa cards .....                            | 33       |
| 7.04 Domestic transport network .....                          | 3        | <b>ICT infrastructure</b>                                       |          |
| 7.02 Railroad infrastructure .....                             | 5        | 9.01 Extent of business Internet use .....                      | 24       |
| 7.01 Road infrastructure.....                                  | 6        | 9.02 Internet users .....                                       | 18       |
| <b>Price competitiveness in the T&amp;T industry</b>           |          | 9.03 Telephone lines.....                                       | 15       |
| 10.03 Extent and effect of taxation.....                       | 2        | <b>Price competitiveness in the T&amp;T industry</b>            |          |
| <b>Human resources</b>                                         |          | 10.04 Fuel price level .....                                    | 96       |
| 11.01 Primary education enrollment .....                       | 1        | 10.02 Purchasing power parity.....                              | 87       |
| 11.08 HIV prevalence .....                                     | 1        | 10.01 Ticket taxes and airport charges.....                     | 23       |
| 11.09 Malaria incidence.....                                   | 1        | <b>Human resources</b>                                          |          |
| 11.11 Life expectancy .....                                    | 1        | 11.10 Tuberculosis incidence .....                              | 65       |
| 11.03 Quality of the educational system .....                  | 7        | 11.02 Secondary education enrollment.....                       | 64       |
| <b>Natural and cultural resources</b>                          |          | 11.07 Ease of hiring foreign labor .....                        | 24       |
| 13.05 Risk of malaria and yellow fever .....                   | 1        | 11.05 Extent of staff training.....                             | 21       |
|                                                                |          | 11.04 Local availability of research and training services..... | 18       |
|                                                                |          | 11.06 Hiring and firing practices.....                          | 13       |
|                                                                |          | <b>National tourism perception</b>                              |          |
|                                                                |          | 12.03 Recommendation to extend business trips .....             | 67       |
|                                                                |          | 12.02 Attitude toward tourists .....                            | 28       |
|                                                                |          | 12.01 Tourism openness .....                                    | 15       |
|                                                                |          | <b>Natural and cultural resources</b>                           |          |
|                                                                |          | 13.01 Number of World Heritage sites .....                      | 107      |
|                                                                |          | 13.04 Business concern for ecosystems .....                     | 39       |
|                                                                |          | 13.02 Carbon dioxide damage.....                                | 13       |

# Hungary

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 10.1   |
| Surface area (1,000 square kilometers) .....              | 93.0   |
| Gross domestic product (US\$ billions), 2005 .....        | 109.2  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 16,823 |
| Real GDP growth (percent), 2005 .....                     | 4.1    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

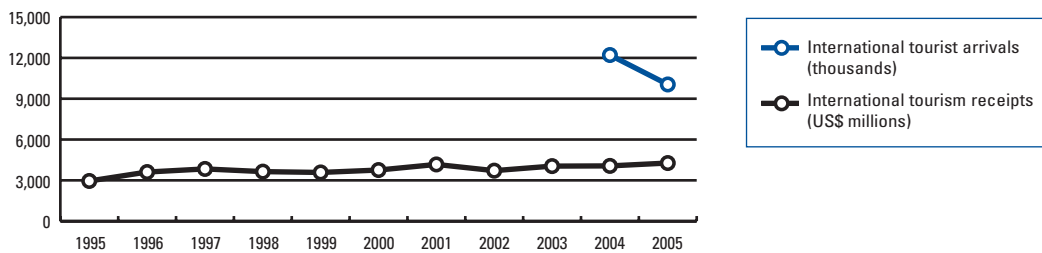
|                               |       | Percent<br>of total | 2007–2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 3,826 | 3.5                 | 4.7                                         |
| Employment (1,000 jobs) ..... | 206   | 5.2                 | 0.1                                         |

### T&T economy, 2006 estimates

|                               |        |     |     |
|-------------------------------|--------|-----|-----|
| GDP (US\$ millions) .....     | 10,005 | 9.0 | 4.9 |
| Employment (1,000 jobs) ..... | 336    | 8.6 | 0.3 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |        |
|------------------------------------------------------------|--------|
| International tourist arrivals (1,000), 2005 .....         | 10,048 |
| International tourism receipts (US\$ millions), 2005 ..... | 4,271  |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1–7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>40</b>            | <b>4.6</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>26</b>            | <b>5.2</b>           |
| Policy rules and regulations .....                           | 25                   | 5.3                  |
| Environmental regulation .....                               | 33                   | 4.8                  |
| Safety and security .....                                    | 25                   | 5.3                  |
| Health and hygiene .....                                     | 12                   | 6.2                  |
| Prioritization of T&T strategies .....                       | 39                   | 4.2                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>51</b>            | <b>3.7</b>           |
| Air transport infrastructure .....                           | 65                   | 3.0                  |
| Ground transport infrastructure .....                        | 56                   | 3.7                  |
| Tourism infrastructure .....                                 | 34                   | 4.1                  |
| ICT infrastructure .....                                     | 39                   | 3.6                  |
| Price competitiveness in T&T industry .....                  | 97                   | 4.1                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>51</b>            | <b>5.0</b>           |
| Human resources .....                                        | 37                   | 5.3                  |
| Education and training .....                                 | 36                   | 5.1                  |
| Availability of qualified labor .....                        | 66                   | 4.3                  |
| Workforce wellness .....                                     | 39                   | 6.6                  |
| National tourism perception .....                            | 100                  | 4.4                  |
| Natural and cultural resources .....                         | 30                   | 5.2                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                            | Rank/124 | COMPETITIVE DISADVANTAGES                                 | Rank/124 |
|-------------------------------------------------------------------|----------|-----------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                               |          | <b>Policy rules and regulations</b>                       |          |
| 1.04 Visa requirements .....15                                    |          | 1.05 Openness of bilateral Air Service Agreements .....45 |          |
| 1.01 Foreign ownership restrictions.....18                        |          |                                                           |          |
| 1.03 Rules governing foreign direct investment .....28            |          | <b>Environmental regulation</b>                           |          |
| 1.02 Property rights.....32                                       |          | 2.03 Government prioritization of sustainable T&T .....59 |          |
|                                                                   |          |                                                           |          |
| <b>Environmental regulation</b>                                   |          | <b>Safety and security</b>                                |          |
| 2.01 Stringency of environmental regulation .....29               |          | 3.02 Reliability of police services .....43               |          |
| 2.02 Clarity and stability of environmental regulations .....34   |          |                                                           |          |
|                                                                   |          | <b>Health and hygiene</b>                                 |          |
| <b>Safety and security</b>                                        |          | 4.03 Access to improved sanitation .....40                |          |
| 3.01 Business costs of terrorism .....4                           |          |                                                           |          |
| 3.03 Business costs of crime and violence.....34                  |          | <b>Prioritization of Travel &amp; Tourism</b>             |          |
|                                                                   |          | 5.03 Effectiveness of marketing and branding .....71      |          |
| <b>Health and hygiene</b>                                         |          | 5.01 Government prioritization of the T&T industry.....50 |          |
| 4.01 Gov't efforts to reduce health risks from pandemics .....7   |          |                                                           |          |
| 4.02 Physician density .....21                                    |          | <b>Air transport infrastructure</b>                       |          |
| 4.04 Access to improved drinking water .....37                    |          | 6.04 Airport density .....78                              |          |
|                                                                   |          | 6.01 Quality of air transport infrastructure .....63      |          |
| <b>Prioritization of Travel &amp; Tourism</b>                     |          | 6.02 Available seat kilometers.....59                     |          |
| 5.02 T&T government expenditure .....28                           |          | 6.03 Departures per 1,000 population.....51               |          |
| 5.04 T&T fair attendance .....35                                  |          | 6.06 International air transport network .....45          |          |
|                                                                   |          |                                                           |          |
| <b>Air transport infrastructure</b>                               |          | <b>Ground transport infrastructure</b>                    |          |
| 6.05 Number of operating airlines.....35                          |          | 7.03 Port infrastructure .....80                          |          |
|                                                                   |          | 7.01 Road infrastructure .....59                          |          |
| <b>Tourism infrastructure</b>                                     |          | 7.04 Domestic transport network .....46                   |          |
| 8.02 Presence of major car rental companies.....1                 |          | 7.02 Railroad infrastructure .....42                      |          |
| 8.03 ATMs accepting Visa cards .....39                            |          |                                                           |          |
|                                                                   |          | <b>Tourism infrastructure</b>                             |          |
| <b>ICT infrastructure</b>                                         |          | 8.01 Hotel rooms.....40                                   |          |
| 9.03 Telephone lines.....34                                       |          |                                                           |          |
|                                                                   |          | <b>ICT infrastructure</b>                                 |          |
| <b>Price competitiveness in the T&amp;T industry</b>              |          | 9.01 Extent of business Internet use .....43              |          |
| 10.01 Ticket taxes and airport charges.....39                     |          | 9.02 Internet users .....42                               |          |
|                                                                   |          |                                                           |          |
| <b>Human resources</b>                                            |          | <b>Price competitiveness in the T&amp;T industry</b>      |          |
| 11.09 Malaria incidence.....1                                     |          | 10.04 Fuel price level .....112                           |          |
| 11.08 HIV prevalence .....25                                      |          | 10.03 Extent and effect of taxation.....79                |          |
| 11.04 Local availability of research and training services.....36 |          | 10.02 Purchasing power parity.....77                      |          |
| 11.10 Tuberculosis incidence .....36                              |          |                                                           |          |
| 11.02 Secondary education enrollment.....37                       |          | <b>Human resources</b>                                    |          |
|                                                                   |          | 11.01 Primary education enrollment .....95                |          |
| <b>National tourism perception</b>                                |          | 11.06 Hiring and firing practices.....69                  |          |
| 12.01 Tourism openness .....39                                    |          | 11.07 Ease of hiring foreign labor .....66                |          |
|                                                                   |          | 11.05 Extent of staff training.....53                     |          |
| <b>Natural and cultural resources</b>                             |          | 11.11 Life expectancy .....49                             |          |
| 13.05 Risk of malaria and yellow fever .....1                     |          | 11.03 Quality of the educational system .....42           |          |
| 13.01 Number of World Heritage sites .....24                      |          |                                                           |          |
| 13.04 Business concern for ecosystems .....38                     |          | <b>National tourism perception</b>                        |          |
|                                                                   |          | 12.03 Recommendation to extend business trips .....118    |          |
|                                                                   |          | 12.02 Attitude toward tourists .....100                   |          |
|                                                                   |          |                                                           |          |
|                                                                   |          | <b>Natural and cultural resources</b>                     |          |
|                                                                   |          | 13.02 Carbon dioxide damage.....63                        |          |
|                                                                   |          | 13.03 Nationally protected areas.....60                   |          |

# Iceland

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 0.3    |
| Surface area (1,000 square kilometers) .....              | 103.0  |
| Gross domestic product (US\$ billions), 2005 .....        | 15.8   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 35,115 |
| Real GDP growth (percent), 2005 .....                     | 5.5    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

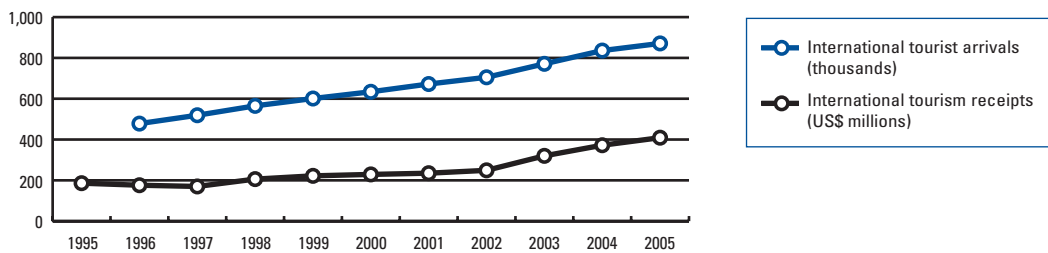
|                               |       | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 1,043 | 6.3                 | 2.0                                         |
| Employment (1,000 jobs) ..... | 10    | 6.3                 | -0.3                                        |

### T&T economy, 2006 estimates

|                               |       |      |     |
|-------------------------------|-------|------|-----|
| GDP (US\$ millions) .....     | 2,866 | 17.4 | 2.1 |
| Employment (1,000 jobs) ..... | 31    | 19.0 | 0.0 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2005 .....         | 871 |
| International tourism receipts (US\$ millions), 2005 ..... | 409 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>4</b>             | <b>5.4</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>5</b>             | <b>5.7</b>           |
| Policy rules and regulations .....                           | 36                   | 5.1                  |
| Environmental regulation .....                               | 12                   | 5.6                  |
| Safety and security .....                                    | 3                    | 6.2                  |
| Health and hygiene .....                                     | 4                    | 6.4                  |
| Prioritization of T&T strategies .....                       | 16                   | 5.1                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>8</b>             | <b>5.0</b>           |
| Air transport infrastructure .....                           | 13                   | 4.8                  |
| Ground transport infrastructure .....                        | 29                   | 4.6                  |
| Tourism infrastructure .....                                 | 10                   | 5.8                  |
| ICT infrastructure .....                                     | 2                    | 6.2                  |
| Price competitiveness in T&T industry .....                  | 108                  | 3.8                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>5</b>             | <b>5.6</b>           |
| Human resources .....                                        | 3                    | 6.2                  |
| Education and training .....                                 | 7                    | 6.1                  |
| Availability of qualified labor .....                        | 6                    | 5.5                  |
| Workforce wellness .....                                     | 3                    | 7.0                  |
| National tourism perception .....                            | 49                   | 5.2                  |
| Natural and cultural resources .....                         | 22                   | 5.4                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."



## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                          | Rank/124 | COMPETITIVE DISADVANTAGES                                         | Rank/124 |
|-----------------------------------------------------------------|----------|-------------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                             |          | <b>Policy rules and regulations</b>                               |          |
| 1.02 Property rights.....2                                      |          | 1.01 Foreign ownership restrictions.....106                       |          |
|                                                                 |          | 1.03 Rules governing foreign direct investment .....59            |          |
| <b>Environmental regulation</b>                                 |          | 1.04 Visa requirements .....43                                    |          |
| 2.02 Clarity and stability of environmental regulations .....10 |          | 1.05 Openness of bilateral Air Service Agreements .....16         |          |
|                                                                 |          |                                                                   |          |
| <b>Safety and security</b>                                      |          | <b>Environmental regulation</b>                                   |          |
| 3.03 Business costs of crime and violence.....1                 |          | 2.01 Stringency of environmental regulation .....17               |          |
| 3.02 Reliability of police services .....6                      |          | 2.03 Government prioritization of sustainable T&T .....15         |          |
|                                                                 |          |                                                                   |          |
| <b>Health and hygiene</b>                                       |          | <b>Safety and security</b>                                        |          |
| 4.03 Access to improved sanitation .....1                       |          | 3.01 Business costs of terrorism .....35                          |          |
| 4.04 Access to improved drinking water .....1                   |          |                                                                   |          |
| 4.01 Gov't efforts to reduce health risks from pandemics .....5 |          | <b>Prioritization of Travel &amp; Tourism</b>                     |          |
| 4.02 Physician density .....10                                  |          | 5.04 T&T fair attendance .....70                                  |          |
|                                                                 |          | 5.01 Government prioritization of the T&T industry .....38        |          |
| <b>Prioritization of Travel &amp; Tourism</b>                   |          |                                                                   |          |
| 5.02 T&T government expenditure .....5                          |          | <b>Air transport infrastructure</b>                               |          |
| 5.03 Effectiveness of marketing and branding .....8             |          | 6.05 Number of operating airlines .....114                        |          |
|                                                                 |          | 6.02 Available seat kilometers.....73                             |          |
| <b>Air transport infrastructure</b>                             |          | 6.01 Quality of air transport infrastructure .....13              |          |
| 6.04 Airport density .....1                                     |          |                                                                   |          |
| 6.03 Departures per 1,000 population.....5                      |          | <b>Ground transport infrastructure</b>                            |          |
| 6.06 International air transport network .....10                |          | 7.02 Railroad infrastructure .....98                              |          |
|                                                                 |          | 7.01 Road infrastructure .....29                                  |          |
| <b>Tourism infrastructure</b>                                   |          | 7.04 Domestic transport network .....14                           |          |
| 8.01 Hotel rooms.....5                                          |          | 7.03 Port infrastructure .....11                                  |          |
|                                                                 |          |                                                                   |          |
| <b>ICT infrastructure</b>                                       |          | <b>Tourism infrastructure</b>                                     |          |
| 9.02 Internet users .....1                                      |          | 8.02 Presence of major car rental companies.....35                |          |
| 9.03 Telephone lines.....5                                      |          | 8.03 ATMs accepting Visa cards .....16                            |          |
| 9.01 Extent of business Internet use .....8                     |          |                                                                   |          |
|                                                                 |          | <b>Price competitiveness in the T&amp;T industry</b>              |          |
| <b>Price competitiveness in the T&amp;T industry</b>            |          | 10.02 Purchasing power parity.....118                             |          |
| 10.03 Extent and effect of taxation.....6                       |          | 10.01 Ticket taxes and airport charges.....105                    |          |
|                                                                 |          | 10.04 Fuel price level .....78                                    |          |
| <b>Human resources</b>                                          |          |                                                                   |          |
| 11.01 Primary education enrollment .....1                       |          | <b>Human resources</b>                                            |          |
| 11.02 Secondary education enrollment.....1                      |          | 11.08 HIV prevalence .....48                                      |          |
| 11.09 Malaria incidence.....1                                   |          | 11.07 Ease of hiring foreign labor .....21                        |          |
| 11.10 Tuberculosis incidence .....1                             |          | 11.04 Local availability of research and training services.....19 |          |
| 11.03 Quality of the educational system .....3                  |          | 11.05 Extent of staff training.....11                             |          |
| 11.11 Life expectancy .....3                                    |          |                                                                   |          |
| 11.06 Hiring and firing practices.....6                         |          | <b>National tourism perception</b>                                |          |
|                                                                 |          | 12.03 Recommendation to extend business trips .....38             |          |
| <b>National tourism perception</b>                              |          | 12.01 Tourism openness .....37                                    |          |
| 12.02 Attitude toward tourists .....9                           |          |                                                                   |          |
|                                                                 |          | <b>Natural and cultural resources</b>                             |          |
| <b>Natural and cultural resources</b>                           |          | 13.01 Number of World Heritage sites .....87                      |          |
| 13.05 Risk of malaria and yellow fever .....1                   |          |                                                                   |          |
| 13.04 Business concern for ecosystems .....2                    |          |                                                                   |          |
| 13.02 Carbon dioxide damage.....7                               |          |                                                                   |          |

# India

## Key indicators

|                                                           |         |
|-----------------------------------------------------------|---------|
| Population (millions), 2005 .....                         | 1,094.6 |
| Surface area (1,000 square kilometers) .....              | 3,287.3 |
| Gross domestic product (US\$ billions), 2005 .....        | 772.0   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 3,320   |
| Real GDP growth (percent), 2005 .....                     | 8.5     |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

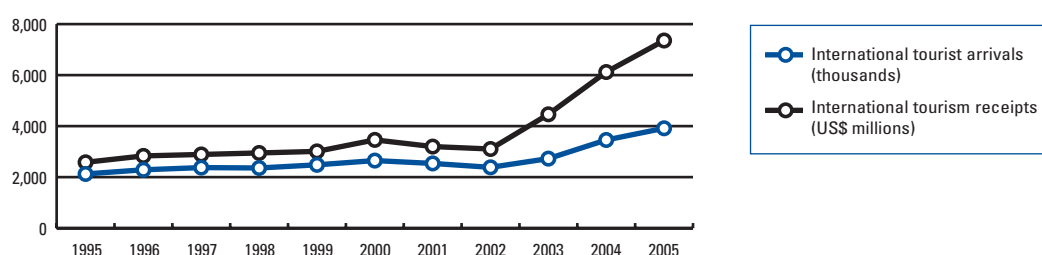
|                               |        | Percent of total | 2007-2016 annual growth (% forecast) |
|-------------------------------|--------|------------------|--------------------------------------|
| GDP (US\$ millions) .....     | 16,315 | 2.1              | 5.1                                  |
| Employment (1,000 jobs) ..... | 10,680 | 2.4              | -0.1                                 |

### T&T economy, 2006 estimates

|                               |        |     |     |
|-------------------------------|--------|-----|-----|
| GDP (US\$ millions) .....     | 41,771 | 5.3 | 6.6 |
| Employment (1,000 jobs) ..... | 24,349 | 5.4 | 1.0 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 3,915 |
| International tourism receipts (US\$ millions), 2005 ..... | 7,356 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank (out of 124) | Score (1-7 scale) |
|--------------------------------------------------------------|-------------------|-------------------|
| <b>2007 Index</b> .....                                      | <b>65</b>         | <b>4.1</b>        |
| <b>T&amp;T regulatory framework</b> .....                    | <b>62</b>         | <b>4.2</b>        |
| Policy rules and regulations .....                           | 86                | 4.1               |
| Environmental regulation .....                               | 41                | 4.5               |
| Safety and security .....                                    | 39                | 5.0               |
| Health and hygiene .....                                     | 100               | 3.6               |
| Prioritization of T&T strategies .....                       | 48                | 4.1               |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>55</b>         | <b>3.6</b>        |
| Air transport infrastructure .....                           | 33                | 3.9               |
| Ground transport infrastructure .....                        | 40                | 4.2               |
| Tourism infrastructure .....                                 | 96                | 2.2               |
| ICT infrastructure .....                                     | 75                | 2.4               |
| Price competitiveness in T&T industry .....                  | 6                 | 5.6               |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>81</b>         | <b>4.6</b>        |
| Human resources .....                                        | 85                | 4.8               |
| Education and training .....                                 | 46                | 5.0               |
| Availability of qualified labor .....                        | 74                | 4.2               |
| Workforce wellness .....                                     | 97                | 5.3               |
| National tourism perception .....                            | 81                | 4.6               |
| Natural and cultural resources .....                         | 70                | 4.2               |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                          | Rank/124 | COMPETITIVE DISADVANTAGES                                      | Rank/124 |
|-----------------------------------------------------------------|----------|----------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                             |          | <b>Policy rules and regulations</b>                            |          |
| 1.02 Property rights.....                                       | 25       | 1.04 Visa requirements .....                                   | 106      |
| 1.03 Rules governing foreign direct investment .....            | 34       | 1.05 Openness of bilateral Air Service Agreements .....        | 88       |
| 1.01 Foreign ownership restrictions.....                        | 39       |                                                                |          |
| <b>Environmental regulation</b>                                 |          | <b>Safety and security</b>                                     |          |
| 2.01 Stringency of environmental regulation .....               | 41       | 3.01 Business costs of terrorism .....                         | 84       |
| 2.03 Government prioritization of sustainable T&T .....         | 48       |                                                                |          |
| 2.02 Clarity and stability of environmental regulations .....   | 49       | <b>Health and hygiene</b>                                      |          |
| <b>Safety and security</b>                                      |          | 4.03 Access to improved sanitation .....                       | 104      |
| 3.03 Business costs of crime and violence.....                  | 24       | 4.02 Physician density .....                                   | 87       |
| 3.02 Reliability of police services .....                       | 48       | 4.01 Gov't efforts to reduce health risks from pandemics ..... | 72       |
| <b>Prioritization of Travel &amp; Tourism</b>                   |          | 4.04 Access to improved drinking water .....                   | 67       |
| 5.04 T&T fair attendance .....                                  | 4        |                                                                |          |
| <b>Air transport infrastructure</b>                             |          | <b>Prioritization of Travel &amp; Tourism</b>                  |          |
| 6.05 Number of operating airlines.....                          | 14       | 5.02 T&T government expenditure .....                          | 108      |
| 6.02 Available seat kilometers.....                             | 15       | 5.01 Government prioritization of the T&T industry.....        | 59       |
| 6.06 International air transport network .....                  | 34       | 5.03 Effectiveness of marketing and branding .....             | 59       |
| 6.01 Quality of air transport infrastructure .....              | 46       |                                                                |          |
| <b>Ground transport infrastructure</b>                          |          | <b>Air transport infrastructure</b>                            |          |
| 7.02 Railroad infrastructure .....                              | 21       | 6.04 Airport density .....                                     | 121      |
| 7.04 Domestic transport network .....                           | 32       | 6.03 Departures per 1,000 population.....                      | 103      |
| <b>ICT infrastructure</b>                                       |          |                                                                |          |
| 9.01 Extent of business Internet use .....                      | 31       | <b>Ground transport infrastructure</b>                         |          |
| <b>Price competitiveness in the T&amp;T industry</b>            |          | 7.01 Road infrastructure.....                                  | 66       |
| 10.01 Ticket taxes and airport charges.....                     | 7        | 7.03 Port infrastructure .....                                 | 61       |
| 10.02 Purchasing power parity .....                             | 11       |                                                                |          |
| 10.03 Extent and effect of taxation.....                        | 21       | <b>Tourism infrastructure</b>                                  |          |
| <b>Human resources</b>                                          |          | 8.01 Hotel rooms.....                                          | 113      |
| 11.01 Primary education enrollment .....                        | 1        | 8.03 ATMs accepting Visa cards .....                           | 91       |
| 11.03 Quality of the educational system .....                   | 25       | 8.02 Presence of major car rental companies.....               | 66       |
| 11.04 Local availability of research and training services..... | 28       |                                                                |          |
| 11.05 Extent of staff training.....                             | 28       | <b>ICT infrastructure</b>                                      |          |
| 11.07 Ease of hiring foreign labor .....                        | 28       | 9.03 Telephone lines.....                                      | 98       |
| <b>National tourism perception</b>                              |          | 9.02 Internet users .....                                      | 94       |
| 12.03 Recommendation to extend business trips .....             | 21       |                                                                |          |
| 12.02 Attitude toward tourists .....                            | 42       | <b>Price competitiveness in the T&amp;T industry</b>           |          |
| <b>Natural and cultural resources</b>                           |          | 10.04 Fuel price level .....                                   | 53       |
| 13.01 Number of World Heritage sites .....                      | 7        |                                                                |          |
|                                                                 |          | <b>Human resources</b>                                         |          |
|                                                                 |          | 11.06 Hiring and firing practices.....                         | 100      |
|                                                                 |          | 11.10 Tuberculosis incidence .....                             | 100      |
|                                                                 |          | 11.02 Secondary education enrollment.....                      | 96       |
|                                                                 |          | 11.11 Life expectancy .....                                    | 96       |
|                                                                 |          | 11.09 Malaria incidence.....                                   | 94       |
|                                                                 |          | 11.08 HIV prevalence .....                                     | 88       |
|                                                                 |          |                                                                |          |
|                                                                 |          | <b>National tourism perception</b>                             |          |
|                                                                 |          | 12.01 Tourism openness .....                                   | 97       |
|                                                                 |          |                                                                |          |
|                                                                 |          | <b>Natural and cultural resources</b>                          |          |
|                                                                 |          | 13.02 Carbon dioxide damage.....                               | 102      |
|                                                                 |          | 13.05 Risk of malaria and yellow fever .....                   | 99       |
|                                                                 |          | 13.03 Nationally protected areas.....                          | 77       |
|                                                                 |          | 13.04 Business concern for ecosystems .....                    | 53       |

# Indonesia

## Key indicators

|                                                           |         |
|-----------------------------------------------------------|---------|
| Population (millions), 2005 .....                         | 220.6   |
| Surface area (1,000 square kilometers) .....              | 1,904.6 |
| Gross domestic product (US\$ billions), 2005 .....        | 281.3   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 4,459   |
| Real GDP growth (percent), 2005 .....                     | 5.6     |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

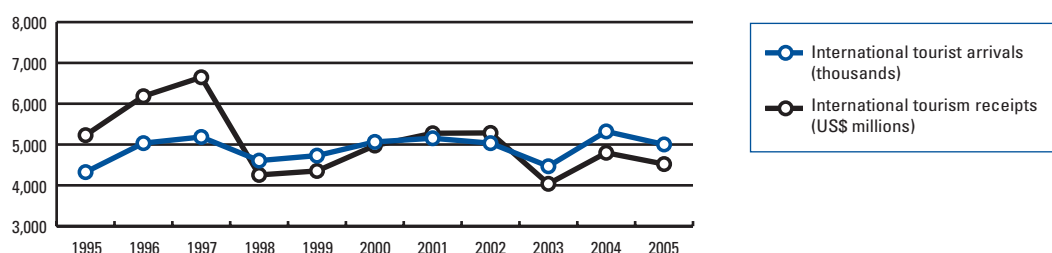
|                               |       | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 9,535 | 3.1                 | 4.9                                         |
| Employment (1,000 jobs) ..... | 2,579 | 2.5                 | 3.3                                         |

### T&T economy, 2006 estimates

|                               |        |     |     |
|-------------------------------|--------|-----|-----|
| GDP (US\$ millions) .....     | 27,047 | 8.7 | 4.6 |
| Employment (1,000 jobs) ..... | 7,332  | 7.2 | 3.0 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 5,002 |
| International tourism receipts (US\$ millions), 2005 ..... | 4,521 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>60</b>            | <b>4.2</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>54</b>            | <b>4.4</b>           |
| Policy rules and regulations .....                           | 43                   | 5.0                  |
| Environmental regulation .....                               | 81                   | 3.7                  |
| Safety and security .....                                    | 50                   | 4.8                  |
| Health and hygiene .....                                     | 103                  | 3.5                  |
| Prioritization of T&T strategies .....                       | 6                    | 5.4                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>68</b>            | <b>3.3</b>           |
| Air transport infrastructure .....                           | 64                   | 3.0                  |
| Ground transport infrastructure .....                        | 89                   | 2.8                  |
| Tourism infrastructure .....                                 | 87                   | 2.4                  |
| ICT infrastructure .....                                     | 80                   | 2.3                  |
| Price competitiveness in T&T industry .....                  | 1                    | 6.1                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>56</b>            | <b>4.8</b>           |
| Human resources .....                                        | 62                   | 5.1                  |
| Education and training .....                                 | 43                   | 5.1                  |
| Availability of qualified labor .....                        | 42                   | 4.7                  |
| Workforce wellness .....                                     | 92                   | 5.7                  |
| National tourism perception .....                            | 57                   | 5.0                  |
| Natural and cultural resources .....                         | 58                   | 4.4                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                            | Rank/124 | COMPETITIVE DISADVANTAGES                                         | Rank/124 |
|-------------------------------------------------------------------|----------|-------------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                               |          | <b>Policy rules and regulations</b>                               |          |
| 1.03 Rules governing foreign direct investment .....8             |          | 1.02 Property rights .....90                                      |          |
| 1.01 Foreign ownership restrictions.....12                        |          |                                                                   |          |
| 1.05 Openness of bilateral Air Service Agreements .....30         |          | <b>Environmental regulation</b>                                   |          |
| 1.04 Visa requirements .....43                                    |          | 2.01 Stringency of environmental regulation .....101              |          |
|                                                                   |          | 2.02 Clarity and stability of environmental regulations .....70   |          |
| <b>Safety and security</b>                                        |          | 2.03 Government prioritization of sustainable T&T .....65         |          |
| 3.01 Business costs of terrorism .....21                          |          |                                                                   |          |
| 3.03 Business costs of crime and violence.....28                  |          | <b>Safety and security</b>                                        |          |
|                                                                   |          | 3.02 Reliability of police services .....99                       |          |
| <b>Prioritization of Travel &amp; Tourism</b>                     |          |                                                                   |          |
| 5.02 T&T government expenditure .....12                           |          | <b>Health and hygiene</b>                                         |          |
| 5.03 Effectiveness of marketing and branding .....15              |          | 4.02 Physician density .....108                                   |          |
| 5.04 T&T fair attendance .....23                                  |          | 4.01 Gov't efforts to reduce health risks from pandemics .....100 |          |
| 5.01 Government prioritization of the T&T industry .....34        |          | 4.04 Access to improved drinking water .....87                    |          |
|                                                                   |          | 4.03 Access to improved sanitation .....84                        |          |
| <b>Air transport infrastructure</b>                               |          |                                                                   |          |
| 6.02 Available seat kilometers.....24                             |          | <b>Air transport infrastructure</b>                               |          |
| 6.05 Number of operating airlines .....33                         |          | 6.04 Airport density .....95                                      |          |
|                                                                   |          | 6.03 Departures per 1,000 population.....83                       |          |
| <b>ICT infrastructure</b>                                         |          | 6.01 Quality of air transport infrastructure .....73              |          |
| 9.01 Extent of business Internet use .....48                      |          | 6.06 International air transport network .....64                  |          |
|                                                                   |          |                                                                   |          |
| <b>Price competitiveness in the T&amp;T industry</b>              |          | <b>Ground transport infrastructure</b>                            |          |
| 10.04 Fuel price level .....5                                     |          | 7.01 Road infrastructure .....110                                 |          |
| 10.01 Ticket taxes and airport charges.....10                     |          | 7.03 Port infrastructure .....97                                  |          |
| 10.03 Extent and effect of taxation.....11                        |          | 7.04 Domestic transport network .....74                           |          |
| 10.02 Purchasing power parity .....24                             |          | 7.02 Railroad infrastructure .....64                              |          |
|                                                                   |          |                                                                   |          |
| <b>Human resources</b>                                            |          | <b>Tourism infrastructure</b>                                     |          |
| 11.01 Primary education enrollment .....1                         |          | 8.01 Hotel rooms.....79                                           |          |
| 11.07 Ease of hiring foreign labor .....14                        |          | 8.03 ATMs accepting Visa cards .....76                            |          |
| 11.03 Quality of the educational system .....23                   |          | 8.02 Presence of major car rental companies.....66                |          |
| 11.04 Local availability of research and training services.....24 |          |                                                                   |          |
| 11.08 HIV prevalence .....25                                      |          | <b>ICT infrastructure</b>                                         |          |
| 11.05 Extent of staff training.....40                             |          | 9.03 Telephone lines.....95                                       |          |
|                                                                   |          | 9.02 Internet users .....79                                       |          |
| <b>National tourism perception</b>                                |          |                                                                   |          |
| 12.03 Recommendation to extend business trips .....5              |          | <b>Human resources</b>                                            |          |
|                                                                   |          | 11.10 Tuberculosis incidence .....96                              |          |
| <b>Natural and cultural resources</b>                             |          | 11.02 Secondary education enrollment.....91                       |          |
| 13.03 Nationally protected areas.....15                           |          | 11.09 Malaria incidence.....89                                    |          |
| 13.01 Number of World Heritage sites .....30                      |          | 11.11 Life expectancy .....83                                     |          |
|                                                                   |          | 11.06 Hiring and firing practices.....77                          |          |
|                                                                   |          |                                                                   |          |
|                                                                   |          | <b>National tourism perception</b>                                |          |
|                                                                   |          | 12.01 Tourism openness .....57                                    |          |
|                                                                   |          | 12.02 Attitude toward tourists .....54                            |          |
|                                                                   |          |                                                                   |          |
|                                                                   |          | <b>Natural and cultural resources</b>                             |          |
|                                                                   |          | 13.04 Business concern for ecosystems .....109                    |          |
|                                                                   |          | 13.05 Risk of malaria and yellow fever .....101                   |          |
|                                                                   |          | 13.02 Carbon dioxide damage.....85                                |          |

# Ireland

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 4.2    |
| Surface area (1,000 square kilometers) .....              | 70.3   |
| Gross domestic product (US\$ billions), 2005 .....        | 200.8  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 40,610 |
| Real GDP growth (percent), 2005 .....                     | 5.5    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

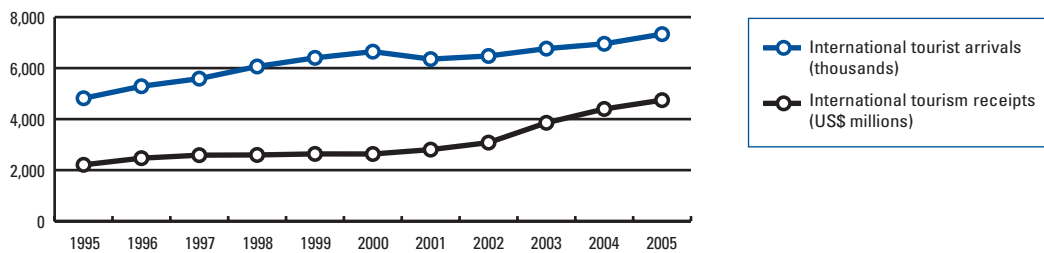
|                               |       | Percent<br>of total | 2007–2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 4,972 | 2.3                 | 3.2                                         |
| Employment (1,000 jobs) ..... | 48    | 2.4                 | 0.7                                         |

### T&T economy, 2006 estimates

|                               |        |     |     |
|-------------------------------|--------|-----|-----|
| GDP (US\$ millions) .....     | 16,440 | 7.7 | 3.8 |
| Employment (1,000 jobs) ..... | 143    | 7.2 | 1.5 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 7,333 |
| International tourism receipts (US\$ millions), 2005 ..... | 4,744 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1–7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>27</b>            | <b>4.9</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>14</b>            | <b>5.3</b>           |
| Policy rules and regulations .....                           | 4                    | 5.7                  |
| Environmental regulation .....                               | 22                   | 5.2                  |
| Safety and security .....                                    | 31                   | 5.2                  |
| Health and hygiene .....                                     | 35                   | 5.7                  |
| Prioritization of T&T strategies .....                       | 24                   | 4.8                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>26</b>            | <b>4.4</b>           |
| Air transport infrastructure .....                           | 20                   | 4.3                  |
| Ground transport infrastructure .....                        | 50                   | 3.8                  |
| Tourism infrastructure .....                                 | 13                   | 5.6                  |
| ICT infrastructure .....                                     | 30                   | 4.3                  |
| Price competitiveness in T&T industry .....                  | 91                   | 4.1                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>46</b>            | <b>5.0</b>           |
| Human resources .....                                        | 9                    | 5.8                  |
| Education and training .....                                 | 13                   | 6.0                  |
| Availability of qualified labor .....                        | 33                   | 4.7                  |
| Workforce wellness .....                                     | 20                   | 6.8                  |
| National tourism perception .....                            | 67                   | 4.8                  |
| Natural and cultural resources .....                         | 54                   | 4.5                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                          | Rank/124 | COMPETITIVE DISADVANTAGES                                      | Rank/124 |
|-----------------------------------------------------------------|----------|----------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                             |          | <b>Policy rules and regulations</b>                            |          |
| 1.01 Foreign ownership restrictions.....                        | 1        | 1.04 Visa requirements .....                                   | 43       |
| 1.03 Rules governing foreign direct investment .....            | 2        |                                                                |          |
| 1.02 Property rights.....                                       | 9        | <b>Safety and security</b>                                     |          |
| 1.05 Openness of bilateral Air Service Agreements .....         | 26       | 3.01 Business costs of terrorism .....                         | 49       |
|                                                                 |          | 3.03 Business costs of crime and violence.....                 | 41       |
| <b>Environmental regulation</b>                                 |          | 3.02 Reliability of police services .....                      | 29       |
| 2.03 Government prioritization of sustainable T&T .....         | 21       |                                                                |          |
| 2.01 Stringency of environmental regulation .....               | 24       | <b>Health and hygiene</b>                                      |          |
| 2.02 Clarity and stability of environmental regulations .....   | 24       | 4.01 Gov't efforts to reduce health risks from pandemics ..... | 80       |
|                                                                 |          | 4.02 Physician density .....                                   | 33       |
| <b>Health and hygiene</b>                                       |          |                                                                |          |
| 4.03 Access to improved sanitation .....                        | 1        | <b>Prioritization of Travel &amp; Tourism</b>                  |          |
| 4.04 Access to improved drinking water .....                    | 1        | 5.02 T&T government expenditure .....                          | 53       |
|                                                                 |          |                                                                |          |
| <b>Prioritization of Travel &amp; Tourism</b>                   |          | <b>Air transport infrastructure</b>                            |          |
| 5.03 Effectiveness of marketing and branding .....              | 9        | 6.04 Airport density .....                                     | 49       |
| 5.01 Government prioritization of the T&T industry.....         | 13       | 6.02 Available seat kilometers.....                            | 37       |
| 5.04 T&T fair attendance .....                                  | 15       | 6.05 Number of operating airlines.....                         | 32       |
|                                                                 |          | 6.01 Quality of air transport infrastructure .....             | 30       |
| <b>Air transport infrastructure</b>                             |          | 6.06 International air transport network .....                 | 27       |
| 6.03 Departures per 1,000 population.....                       | 4        |                                                                |          |
|                                                                 |          | <b>Ground transport infrastructure</b>                         |          |
| <b>Tourism infrastructure</b>                                   |          | 7.04 Domestic transport network .....                          | 55       |
| 8.02 Presence of major car rental companies.....                | 1        | 7.01 Road infrastructure .....                                 | 54       |
| 8.01 Hotel rooms.....                                           | 12       | 7.02 Railroad infrastructure .....                             | 53       |
| 8.03 ATMs accepting Visa cards .....                            | 19       | 7.03 Port infrastructure .....                                 | 48       |
|                                                                 |          |                                                                |          |
| <b>ICT infrastructure</b>                                       |          | <b>ICT infrastructure</b>                                      |          |
| 9.03 Telephone lines.....                                       | 19       | 9.02 Internet users .....                                      | 37       |
| 9.01 Extent of business Internet use .....                      | 25       |                                                                |          |
|                                                                 |          | <b>Price competitiveness in the T&amp;T industry</b>           |          |
| <b>Price competitiveness in the T&amp;T industry</b>            |          | 10.04 Fuel price level .....                                   | 116      |
| 10.03 Extent and effect of taxation.....                        | 10       | 10.02 Purchasing power parity.....                             | 113      |
| 10.01 Ticket taxes and airport charges.....                     | 15       |                                                                |          |
|                                                                 |          | <b>Human resources</b>                                         |          |
| <b>Human resources</b>                                          |          | 11.06 Hiring and firing practices.....                         | 89       |
| 11.01 Primary education enrollment .....                        | 1        |                                                                |          |
| 11.02 Secondary education enrollment.....                       | 1        | <b>National tourism perception</b>                             |          |
| 11.09 Malaria incidence.....                                    | 1        | 12.03 Recommendation to extend business trips .....            | 84       |
| 11.07 Ease of hiring foreign labor .....                        | 2        | 12.01 Tourism openness .....                                   | 48       |
| 11.03 Quality of the educational system .....                   | 6        |                                                                |          |
| 11.05 Extent of staff training .....                            | 15       | <b>Natural and cultural resources</b>                          |          |
| 11.10 Tuberculosis incidence .....                              | 19       | 13.03 Nationally protected areas.....                          | 97       |
| 11.04 Local availability of research and training services..... | 23       | 13.01 Number of World Heritage sites .....                     | 73       |
| 11.11 Life expectancy .....                                     | 24       |                                                                |          |
| 11.08 HIV prevalence .....                                      | 25       |                                                                |          |
|                                                                 |          |                                                                |          |
| <b>National tourism perception</b>                              |          |                                                                |          |
| 12.02 Attitude toward tourists .....                            | 17       |                                                                |          |
|                                                                 |          |                                                                |          |
| <b>Natural and cultural resources</b>                           |          |                                                                |          |
| 13.05 Risk of malaria and yellow fever .....                    | 1        |                                                                |          |
| 13.04 Business concern for ecosystems .....                     | 19       |                                                                |          |
| 13.02 Carbon dioxide damage.....                                | 23       |                                                                |          |



# Israel

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 6.9    |
| Surface area (1,000 square kilometers) .....              | 22.1   |
| Gross domestic product (US\$ billions), 2005 .....        | 129.8  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 23,474 |
| Real GDP growth (percent), 2005 .....                     | 5.2    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

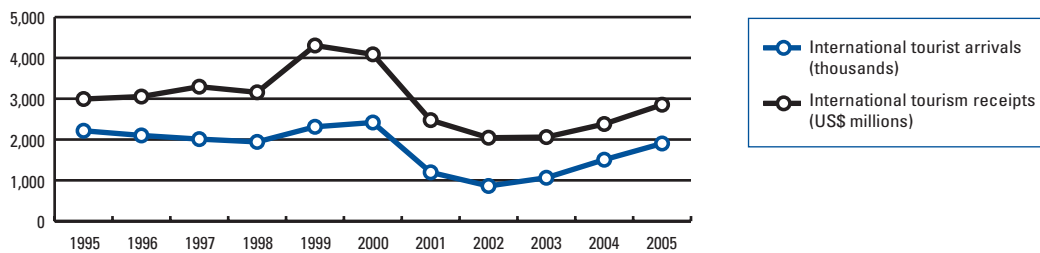
|                               |       | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 3,561 | 2.7                 | 4.7                                         |
| Employment (1,000 jobs) ..... | 108   | 3.8                 | 3.3                                         |

### T&T economy, 2006 estimates

|                               |       |     |     |
|-------------------------------|-------|-----|-----|
| GDP (US\$ millions) .....     | 9,950 | 7.6 | 4.3 |
| Employment (1,000 jobs) ..... | 254   | 9.0 | 3.0 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 1,903 |
| International tourism receipts (US\$ millions), 2005 ..... | 2,853 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>32</b>            | <b>4.8</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>36</b>            | <b>4.9</b>           |
| Policy rules and regulations .....                           | 30                   | 5.2                  |
| Environmental regulation .....                               | 30                   | 4.9                  |
| Safety and security .....                                    | 69                   | 4.3                  |
| Health and hygiene .....                                     | 7                    | 6.3                  |
| Prioritization of T&T strategies .....                       | 53                   | 3.9                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>33</b>            | <b>4.3</b>           |
| Air transport infrastructure .....                           | 40                   | 3.6                  |
| Ground transport infrastructure .....                        | 24                   | 4.9                  |
| Tourism infrastructure .....                                 | 41                   | 3.8                  |
| ICT infrastructure .....                                     | 23                   | 4.8                  |
| Price competitiveness in T&T industry .....                  | 78                   | 4.3                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>35</b>            | <b>5.2</b>           |
| Human resources .....                                        | 13                   | 5.7                  |
| Education and training .....                                 | 20                   | 5.8                  |
| Availability of qualified labor .....                        | 61                   | 4.4                  |
| Workforce wellness .....                                     | 5                    | 6.9                  |
| National tourism perception .....                            | 78                   | 4.6                  |
| Natural and cultural resources .....                         | 27                   | 5.2                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                            | Rank/124 | COMPETITIVE DISADVANTAGES                                  | Rank/124 |
|-------------------------------------------------------------------|----------|------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                               |          | <b>Policy rules and regulations</b>                        |          |
| 1.02 Property rights.....23                                       |          | 1.04 Visa requirements .....43                             |          |
| 1.01 Foreign ownership restrictions.....25                        |          | 1.05 Openness of bilateral Air Service Agreements .....39  |          |
| 1.03 Rules governing foreign direct investment .....30            |          |                                                            |          |
| <b>Environmental regulation</b>                                   |          | <b>Environmental regulation</b>                            |          |
| 2.02 Clarity and stability of environmental regulations .....27   |          | 2.01 Stringency of environmental regulation .....38        |          |
| 2.03 Government prioritization of sustainable T&T .....27         |          |                                                            |          |
| <b>Health and hygiene</b>                                         |          | <b>Safety and security</b>                                 |          |
| 4.03 Access to improved sanitation .....1                         |          | 3.01 Business costs of terrorism .....120                  |          |
| 4.04 Access to improved drinking water .....1                     |          | 3.02 Reliability of police services .....42                |          |
| 4.02 Physician density .....8                                     |          | 3.03 Business costs of crime and violence.....36           |          |
| 4.01 Gov't efforts to reduce health risks from pandemics .....29  |          |                                                            |          |
| <b>Air transport infrastructure</b>                               |          | <b>Prioritization of Travel &amp; Tourism</b>              |          |
| 6.06 International air transport network .....12                  |          | 5.02 T&T government expenditure .....85                    |          |
| 6.01 Quality of air transport infrastructure .....26              |          | 5.01 Government prioritization of the T&T industry .....54 |          |
|                                                                   |          | 5.03 Effectiveness of marketing and branding .....35       |          |
| <b>Ground transport infrastructure</b>                            |          | 5.04 T&T fair attendance .....35                           |          |
| 7.04 Domestic transport network .....19                           |          |                                                            |          |
| 7.01 Road infrastructure .....26                                  |          | <b>Air transport infrastructure</b>                        |          |
| 7.03 Port infrastructure .....30                                  |          | 6.04 Airport density .....53                               |          |
| 7.02 Railroad infrastructure .....31                              |          | 6.05 Number of operating airlines .....40                  |          |
|                                                                   |          | 6.02 Available seat kilometers.....36                      |          |
| <b>ICT infrastructure</b>                                         |          | 6.03 Departures per 1,000 population.....32                |          |
| 9.01 Extent of business Internet use .....14                      |          |                                                            |          |
| 9.02 Internet users .....25                                       |          | <b>Tourism infrastructure</b>                              |          |
| 9.03 Telephone lines.....28                                       |          | 8.03 ATMs accepting Visa cards .....47                     |          |
|                                                                   |          | 8.01 Hotel rooms.....36                                    |          |
| <b>Human resources</b>                                            |          | 8.02 Presence of major car rental companies.....35         |          |
| 11.01 Primary education enrollment .....1                         |          |                                                            |          |
| 11.09 Malaria incidence .....1                                    |          | <b>Price competitiveness in the T&amp;T industry</b>       |          |
| 11.11 Life expectancy .....8                                      |          | 10.02 Purchasing power parity .....89                      |          |
| 11.04 Local availability of research and training services.....10 |          | 10.04 Fuel price level .....73                             |          |
| 11.10 Tuberculosis incidence .....16                              |          | 10.01 Ticket taxes and airport charges.....60              |          |
| 11.03 Quality of the educational system .....22                   |          | 10.03 Extent and effect of taxation .....58                |          |
| 11.05 Extent of staff training.....23                             |          |                                                            |          |
| 11.08 HIV prevalence .....25                                      |          | <b>Human resources</b>                                     |          |
|                                                                   |          | 11.07 Ease of hiring foreign labor .....95                 |          |
| <b>Natural and cultural resources</b>                             |          | 11.02 Secondary education enrollment.....46                |          |
| 13.05 Risk of malaria and yellow fever .....1                     |          | 11.06 Hiring and firing practices.....35                   |          |
| 13.03 Nationally protected areas.....25                           |          |                                                            |          |
|                                                                   |          | <b>National tourism perception</b>                         |          |
|                                                                   |          | 12.01 Tourism openness .....79                             |          |
|                                                                   |          | 12.02 Attitude toward tourists .....73                     |          |
|                                                                   |          | 12.03 Recommendation to extend business trips .....37      |          |
|                                                                   |          |                                                            |          |
|                                                                   |          | <b>Natural and cultural resources</b>                      |          |
|                                                                   |          | 13.02 Carbon dioxide damage.....58                         |          |
|                                                                   |          | 13.01 Number of World Heritage sites .....48               |          |
|                                                                   |          | 13.04 Business concern for ecosystems .....32              |          |

# Italy

## Key indicators

|                                                           |         |
|-----------------------------------------------------------|---------|
| Population (millions), 2005 .....                         | 57.5    |
| Surface area (1,000 square kilometers) .....              | 301.3   |
| Gross domestic product (US\$ billions), 2005 .....        | 1,765.5 |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 28,534  |
| Real GDP growth (percent), 2005 .....                     | 0.0     |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

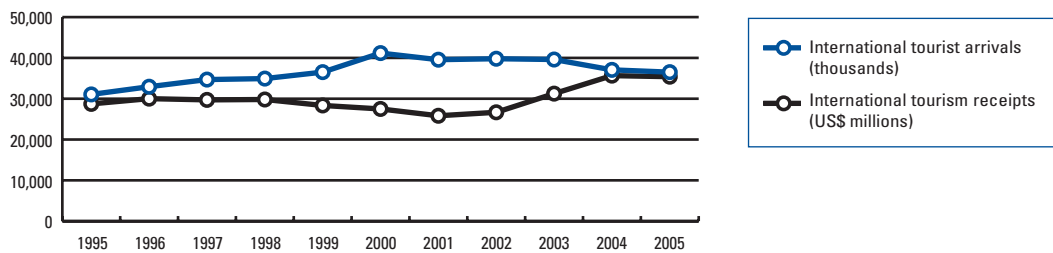
|                               |        | Percent<br>of total | 2007–2016<br>annual growth<br>(%, forecast) |
|-------------------------------|--------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 81,618 | 4.6                 | 1.8                                         |
| Employment (1,000 jobs) ..... | 1,115  | 4.9                 | 0.8                                         |

### T&T economy, 2006 estimates

|                               |         |      |     |
|-------------------------------|---------|------|-----|
| GDP (US\$ millions) .....     | 192,489 | 10.8 | 1.7 |
| Employment (1,000 jobs) ..... | 2,703   | 11.9 | 0.7 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |        |
|------------------------------------------------------------|--------|
| International tourist arrivals (1,000), 2005 .....         | 36,513 |
| International tourism receipts (US\$ millions), 2005 ..... | 35,398 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1–7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>33</b>            | <b>4.8</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>42</b>            | <b>4.8</b>           |
| Policy rules and regulations .....                           | 70                   | 4.6                  |
| Environmental regulation .....                               | 54                   | 4.3                  |
| Safety and security .....                                    | 53                   | 4.7                  |
| Health and hygiene .....                                     | 5                    | 6.4                  |
| Prioritization of T&T strategies .....                       | 60                   | 3.9                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>30</b>            | <b>4.4</b>           |
| Air transport infrastructure .....                           | 22                   | 4.2                  |
| Ground transport infrastructure .....                        | 55                   | 3.8                  |
| Tourism infrastructure .....                                 | 8                    | 6.0                  |
| ICT infrastructure .....                                     | 27                   | 4.5                  |
| Price competitiveness in T&T industry .....                  | 116                  | 3.4                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>32</b>            | <b>5.2</b>           |
| Human resources .....                                        | 46                   | 5.3                  |
| Education and training .....                                 | 38                   | 5.1                  |
| Availability of qualified labor .....                        | 98                   | 3.8                  |
| Workforce wellness .....                                     | 8                    | 6.9                  |
| National tourism perception .....                            | 66                   | 4.8                  |
| Natural and cultural resources .....                         | 20                   | 5.5                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               |                                                           | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                          | Rank/124 |
|------------------------------------------------------|-----------------------------------------------------------|----------|------------------------------------------------------|----------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                  |                                                           |          | <b>Policy rules and regulations</b>                  |                                                          |          |
| 1.05                                                 | Openness of bilateral Air Service Agreements .....        | 28       | 1.01                                                 | Foreign ownership restrictions.....                      | 103      |
| <b>Environmental regulation</b>                      |                                                           |          | 1.03                                                 | Rules governing foreign direct investment .....          | 101      |
| 2.01                                                 | Stringency of environmental regulation .....              | 32       | 1.02                                                 | Property rights.....                                     | 43       |
| <b>Health and hygiene</b>                            |                                                           |          | 1.04                                                 | Visa requirements .....                                  | 43       |
| 4.03                                                 | Access to improved sanitation .....                       | 1        | <b>Environmental regulation</b>                      |                                                          |          |
| 4.04                                                 | Access to improved drinking water .....                   | 1        | 2.03                                                 | Government prioritization of sustainable T&T .....       | 106      |
| 4.02                                                 | Physician density .....                                   | 5        | 2.02                                                 | Clarity and stability of environmental regulations ..... | 40       |
| 4.01                                                 | Gov't efforts to reduce health risks from pandemics ..... | 32       | <b>Safety and security</b>                           |                                                          |          |
| <b>Prioritization of Travel &amp; Tourism</b>        |                                                           |          | 3.01                                                 | Business costs of terrorism .....                        | 81       |
| 5.04                                                 | T&T fair attendance .....                                 | 15       | 3.03                                                 | Business costs of crime and violence.....                | 60       |
| <b>Air transport infrastructure</b>                  |                                                           |          | 3.02                                                 | Reliability of police services .....                     | 40       |
| 6.05                                                 | Number of operating airlines .....                        | 5        | <b>Prioritization of Travel &amp; Tourism</b>        |                                                          |          |
| 6.02                                                 | Available seat kilometers.....                            | 12       | 5.03                                                 | Effectiveness of marketing and branding .....            | 93       |
| <b>Tourism infrastructure</b>                        |                                                           |          | 5.01                                                 | Government prioritization of the T&T industry.....       | 92       |
| 8.02                                                 | Presence of major car rental companies.....               | 1        | 5.02                                                 | T&T government expenditure .....                         | 54       |
| 8.01                                                 | Hotel rooms.....                                          | 10       | <b>Air transport infrastructure</b>                  |                                                          |          |
| 8.03                                                 | ATMs accepting Visa cards .....                           | 11       | 6.04                                                 | Airport density .....                                    | 101      |
| <b>ICT infrastructure</b>                            |                                                           |          | 6.01                                                 | Quality of air transport infrastructure .....            | 67       |
| 9.02                                                 | Internet users .....                                      | 21       | 6.06                                                 | International air transport network .....                | 63       |
| 9.03                                                 | Telephone lines.....                                      | 27       | 6.03                                                 | Departures per 1,000 population.....                     | 36       |
| <b>Price competitiveness in the T&amp;T industry</b> |                                                           |          | <b>Ground transport infrastructure</b>               |                                                          |          |
| 10.01                                                | Ticket taxes and airport charges.....                     | 27       | 7.03                                                 | Port infrastructure .....                                | 77       |
| <b>Human resources</b>                               |                                                           |          | 7.04                                                 | Domestic transport network .....                         | 52       |
| 11.01                                                | Primary education enrollment .....                        | 1        | 7.02                                                 | Railroad infrastructure .....                            | 49       |
| 11.09                                                | Malaria incidence.....                                    | 1        | 7.01                                                 | Road infrastructure .....                                | 44       |
| 11.11                                                | Life expectancy .....                                     | 3        | <b>ICT infrastructure</b>                            |                                                          |          |
| 11.10                                                | Tuberculosis incidence .....                              | 9        | 9.01                                                 | Extent of business Internet use .....                    | 40       |
| 11.02                                                | Secondary education enrollment.....                       | 24       | <b>Price competitiveness in the T&amp;T industry</b> |                                                          |          |
| 11.04                                                | Local availability of research and training services..... | 27       | 10.03                                                | Extent and effect of taxation.....                       | 120      |
| <b>National tourism perception</b>                   |                                                           |          | 10.04                                                | Fuel price level .....                                   | 118      |
| 12.03                                                | Recommendation to extend business trips .....             | 10       | 10.02                                                | Purchasing power parity.....                             | 103      |
| <b>Natural and cultural resources</b>                |                                                           |          | <b>Human resources</b>                               |                                                          |          |
| 13.01                                                | Number of World Heritage sites .....                      | 1        | 11.06                                                | Hiring and firing practices.....                         | 114      |
| 13.05                                                | Risk of malaria and yellow fever .....                    | 1        | 11.08                                                | HIV prevalence .....                                     | 74       |
| 13.02                                                | Carbon dioxide damage.....                                | 15       | 11.03                                                | Quality of the educational system .....                  | 72       |
|                                                      |                                                           |          | 11.05                                                | Extent of staff training.....                            | 62       |
|                                                      |                                                           |          | 11.07                                                | Ease of hiring foreign labor .....                       | 56       |
|                                                      |                                                           |          | <b>National tourism perception</b>                   |                                                          |          |
|                                                      |                                                           |          | 12.01                                                | Tourism openness .....                                   | 72       |
|                                                      |                                                           |          | 12.02                                                | Attitude toward tourists .....                           | 70       |
|                                                      |                                                           |          | <b>Natural and cultural resources</b>                |                                                          |          |
|                                                      |                                                           |          | 13.03                                                | Nationally protected areas.....                          | 55       |
|                                                      |                                                           |          | 13.04                                                | Business concern for ecosystems .....                    | 49       |

# Jamaica

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 2.7   |
| Surface area (1,000 square kilometers) .....              | 11.0  |
| Gross domestic product (US\$ billions), 2005 .....        | 9.7   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 4,381 |
| Real GDP growth (percent), 2005 .....                     | 1.4   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

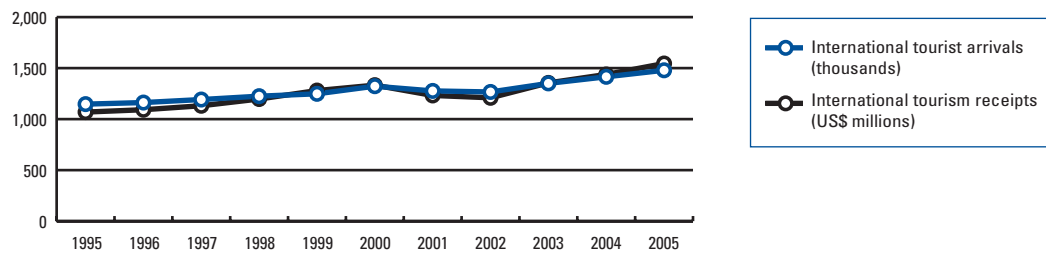
|                               |       | Percent<br>of total | 2007–2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 1,098 | 10.5                | 4.7                                         |
| Employment (1,000 jobs) ..... | 113   | 9.5                 | 4.2                                         |

### T&T economy, 2006 estimates

|                               |       |      |     |
|-------------------------------|-------|------|-----|
| GDP (US\$ millions) .....     | 3,472 | 33.1 | 3.9 |
| Employment (1,000 jobs) ..... | 350   | 29.2 | 3.5 |

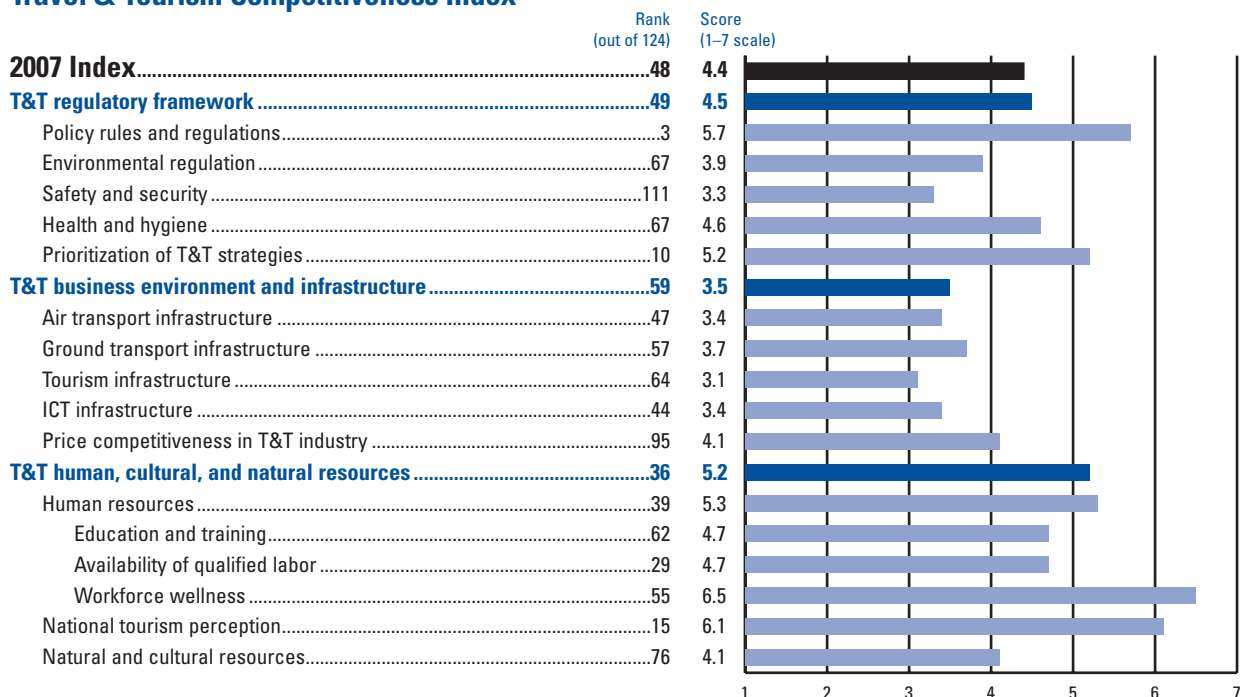
Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 1,479 |
| International tourism receipts (US\$ millions), 2005 ..... | 1,545 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index



Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                     | Rank/124 | COMPETITIVE DISADVANTAGES                                          | Rank/124 |
|------------------------------------------------------------|----------|--------------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                        |          | <b>Policy rules and regulations</b>                                |          |
| 1.04 Visa requirements .....1                              |          | 1.02 Property rights .....48                                       |          |
| 1.05 Openness of bilateral Air Service Agreements .....6   |          |                                                                    |          |
| 1.01 Foreign ownership restrictions .....21                |          | <b>Environmental regulation</b>                                    |          |
| 1.03 Rules governing foreign direct investment .....43     |          | 2.02 Clarity and stability of environmental regulations .....86    |          |
|                                                            |          | 2.01 Stringency of environmental regulation .....71                |          |
| <b>Environmental regulation</b>                            |          |                                                                    |          |
| 2.03 Government prioritization of sustainable T&T .....46  |          | <b>Safety and security</b>                                         |          |
|                                                            |          | 3.03 Business costs of crime and violence .....120                 |          |
| <b>Prioritization of Travel &amp; Tourism</b>              |          | 3.02 Reliability of police services .....113                       |          |
| 5.02 T&T government expenditure .....2                     |          | 3.01 Business costs of terrorism .....73                           |          |
| 5.03 Effectiveness of marketing and branding .....10       |          |                                                                    |          |
| 5.01 Government prioritization of the T&T industry .....15 |          | <b>Health and hygiene</b>                                          |          |
|                                                            |          | 4.02 Physician density .....82                                     |          |
| <b>Air transport infrastructure</b>                        |          | 4.01 Gov't efforts to reduce health risks from pandemics .....79   |          |
| 6.06 International air transport network .....25           |          | 4.03 Access to improved sanitation .....56                         |          |
| 6.03 Departures per 1,000 population .....30               |          | 4.04 Access to improved drinking water .....49                     |          |
| 6.01 Quality of air transport infrastructure .....33       |          |                                                                    |          |
| 6.04 Airport density .....44                               |          | <b>Prioritization of Travel &amp; Tourism</b>                      |          |
|                                                            |          | 5.04 T&T fair attendance .....70                                   |          |
| <b>Ground transport infrastructure</b>                     |          |                                                                    |          |
| 7.03 Port infrastructure .....24                           |          | <b>Air transport infrastructure</b>                                |          |
|                                                            |          | 6.05 Number of operating airlines .....66                          |          |
| <b>Tourism infrastructure</b>                              |          | 6.02 Available seat kilometers .....63                             |          |
| 8.01 Hotel rooms .....33                                   |          |                                                                    |          |
|                                                            |          | <b>Ground transport infrastructure</b>                             |          |
| <b>ICT infrastructure</b>                                  |          | 7.02 Railroad infrastructure .....109                              |          |
| 9.02 Internet users .....30                                |          | 7.04 Domestic transport network .....53                            |          |
|                                                            |          | 7.01 Road infrastructure .....52                                   |          |
| <b>Price competitiveness in the T&amp;T industry</b>       |          |                                                                    |          |
| 10.04 Fuel price level .....43                             |          | <b>Tourism infrastructure</b>                                      |          |
|                                                            |          | 8.03 ATMs accepting Visa cards .....74                             |          |
| <b>Human resources</b>                                     |          | 8.02 Presence of major car rental companies .....66                |          |
| 11.10 Tuberculosis incidence .....17                       |          |                                                                    |          |
| 11.07 Ease of hiring foreign labor .....33                 |          | <b>ICT infrastructure</b>                                          |          |
|                                                            |          | 9.03 Telephone lines .....68                                       |          |
| <b>National tourism perception</b>                         |          | 9.01 Extent of business Internet use .....52                       |          |
| 12.01 Tourism openness .....9                              |          |                                                                    |          |
| 12.02 Attitude toward tourists .....22                     |          | <b>Price competitiveness in the T&amp;T industry</b>               |          |
|                                                            |          | 10.01 Ticket taxes and airport charges .....95                     |          |
|                                                            |          | 10.02 Purchasing power parity .....95                              |          |
|                                                            |          | 10.03 Extent and effect of taxation .....91                        |          |
|                                                            |          |                                                                    |          |
|                                                            |          | <b>Human resources</b>                                             |          |
|                                                            |          | 11.01 Primary education enrollment .....103                        |          |
|                                                            |          | 11.08 HIV prevalence .....93                                       |          |
|                                                            |          | 11.03 Quality of the educational system .....68                    |          |
|                                                            |          | 11.02 Secondary education enrollment .....56                       |          |
|                                                            |          | 11.04 Local availability of research and training services .....56 |          |
|                                                            |          | 11.05 Extent of staff training .....54                             |          |
|                                                            |          | 11.11 Life expectancy .....53                                      |          |
|                                                            |          | 11.06 Hiring and firing practices .....51                          |          |
|                                                            |          |                                                                    |          |
|                                                            |          | <b>National tourism perception</b>                                 |          |
|                                                            |          | 12.03 Recommendation to extend business trips .....52              |          |
|                                                            |          |                                                                    |          |
|                                                            |          | <b>Natural and cultural resources</b>                              |          |
|                                                            |          | 13.01 Number of World Heritage sites .....107                      |          |
|                                                            |          | 13.02 Carbon dioxide damage .....89                                |          |
|                                                            |          | 13.04 Business concern for ecosystems .....52                      |          |

# Japan

## Key indicators

|                                                           |         |
|-----------------------------------------------------------|---------|
| Population (millions), 2005 .....                         | 128.0   |
| Surface area (1,000 square kilometers) .....              | 377.9   |
| Gross domestic product (US\$ billions), 2005 .....        | 4,567.4 |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 30,615  |
| Real GDP growth (percent), 2005 .....                     | 2.6     |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

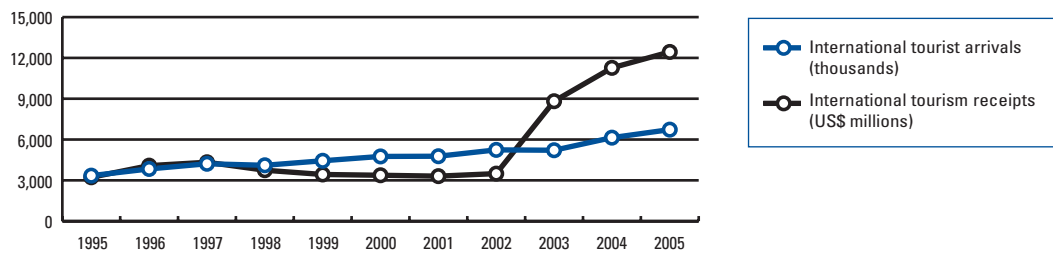
|                               |         | Percent<br>of total | 2007–2016<br>annual growth<br>(%, forecast) |
|-------------------------------|---------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 168,501 | 3.5                 | 2.2                                         |
| Employment (1,000 jobs) ..... | 2,684   | 4.2                 | 1.3                                         |

### T&T economy, 2006 estimates

|                               |         |      |     |
|-------------------------------|---------|------|-----|
| GDP (US\$ millions) .....     | 446,530 | 9.4  | 2.4 |
| Employment (1,000 jobs) ..... | 6,940   | 10.9 | 1.5 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |        |
|------------------------------------------------------------|--------|
| International tourist arrivals (1,000), 2005 .....         | 6,728  |
| International tourism receipts (US\$ millions), 2005 ..... | 12,439 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1–7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index .....</b>                                      | <b>25</b>            | <b>5.0</b>           |
| <b>T&amp;T regulatory framework .....</b>                    | <b>28</b>            | <b>5.1</b>           |
| Policy rules and regulations .....                           | 38                   | 5.0                  |
| Environmental regulation .....                               | 17                   | 5.5                  |
| Safety and security .....                                    | 23                   | 5.4                  |
| Health and hygiene .....                                     | 28                   | 5.8                  |
| Prioritization of T&T strategies .....                       | 63                   | 3.8                  |
| <b>T&amp;T business environment and infrastructure .....</b> | <b>17</b>            | <b>4.7</b>           |
| Air transport infrastructure .....                           | 16                   | 4.7                  |
| Ground transport infrastructure .....                        | 6                    | 6.3                  |
| Tourism infrastructure .....                                 | 43                   | 3.8                  |
| ICT infrastructure .....                                     | 17                   | 4.9                  |
| Price competitiveness in T&T industry .....                  | 107                  | 3.8                  |
| <b>T&amp;T human, cultural, and natural resources .....</b>  | <b>38</b>            | <b>5.1</b>           |
| Human resources .....                                        | 11                   | 5.7                  |
| Education and training .....                                 | 4                    | 6.2                  |
| Availability of qualified labor .....                        | 75                   | 4.2                  |
| Workforce wellness .....                                     | 12                   | 6.9                  |
| National tourism perception .....                            | 116                  | 4.0                  |
| Natural and cultural resources .....                         | 14                   | 5.7                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."



## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                          | Rank/124 | COMPETITIVE DISADVANTAGES                               | Rank/124 |
|-----------------------------------------------------------------|----------|---------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                             |          | <b>Policy rules and regulations</b>                     |          |
| 1.02 Property rights.....                                       | 15       | 1.03 Rules governing foreign direct investment .....    | 82       |
| 1.05 Openness of bilateral Air Service Agreements .....         | 19       | 1.01 Foreign ownership restrictions.....                | 77       |
| <b>Environmental regulation</b>                                 |          | 1.04 Visa requirements .....                            | 43       |
| 2.02 Clarity and stability of environmental regulations .....   | 9        | <b>Environmental regulation</b>                         |          |
| 2.01 Stringency of environmental regulation .....               | 12       | 2.03 Government prioritization of sustainable T&T ..... | 55       |
| <b>Safety and security</b>                                      |          | <b>Safety and security</b>                              |          |
| 3.03 Business costs of crime and violence.....                  | 12       | 3.01 Business costs of terrorism .....                  | 97       |
| 3.02 Reliability of police services .....                       | 17       | <b>Health and hygiene</b>                               |          |
| <b>Health and hygiene</b>                                       |          | 4.02 Physician density.....                             | 53       |
| 4.03 Access to improved sanitation .....                        | 1        | <b>Prioritization of Travel &amp; Tourism</b>           |          |
| 4.04 Access to improved drinking water .....                    | 1        | 5.01 Government prioritization of the T&T industry..... | 98       |
| 4.01 Gov't efforts to reduce health risks from pandemics .....  | 14       | 5.03 Effectiveness of marketing and branding .....      | 80       |
| <b>Prioritization of Travel &amp; Tourism</b>                   |          | 5.02 T&T government expenditure .....                   | 39       |
| 5.04 T&T fair attendance .....                                  | 23       | <b>Air transport infrastructure</b>                     |          |
| <b>Air transport infrastructure</b>                             |          | 6.04 Airport density .....                              | 110      |
| 6.02 Available seat kilometers.....                             | 4        | 6.03 Departures per 1,000 population.....               | 43       |
| 6.01 Quality of air transport infrastructure .....              | 8        | <b>Tourism infrastructure</b>                           |          |
| 6.06 International air transport network .....                  | 11       | 8.02 Presence of major car rental companies.....        | 66       |
| 6.05 Number of operating airlines.....                          | 15       | 8.03 ATMs accepting Visa cards .....                    | 46       |
| <b>Ground transport infrastructure</b>                          |          | <b>Price competitiveness in the T&amp;T industry</b>    |          |
| 7.02 Railroad infrastructure .....                              | 2        | 10.02 Purchasing power parity.....                      | 111      |
| 7.04 Domestic transport network .....                           | 6        | 10.04 Fuel price level .....                            | 88       |
| 7.01 Road infrastructure.....                                   | 8        | 10.01 Ticket taxes and airport charges.....             | 61       |
| 7.03 Port infrastructure .....                                  | 8        | 10.03 Extent and effect of taxation.....                | 49       |
| <b>Tourism infrastructure</b>                                   |          | <b>Human resources</b>                                  |          |
| 8.01 Hotel rooms.....                                           | 15       | 11.07 Ease of hiring foreign labor .....                | 76       |
| <b>ICT infrastructure</b>                                       |          | 11.06 Hiring and firing practices.....                  | 70       |
| 9.01 Extent of business Internet use .....                      | 13       | 11.10 Tuberculosis incidence .....                      | 45       |
| 9.02 Internet users .....                                       | 19       | <b>National tourism perception</b>                      |          |
| 9.03 Telephone lines.....                                       | 22       | 12.03 Recommendation to extend business trips .....     | 106      |
| <b>Human resources</b>                                          |          | 12.01 Tourism openness .....                            | 103      |
| 11.01 Primary education enrollment .....                        | 1        | 12.02 Attitude toward tourists .....                    | 82       |
| 11.02 Secondary education enrollment.....                       | 1        | <b>Natural and cultural resources</b>                   |          |
| 11.04 Local availability of research and training services..... | 1        | 13.03 Nationally protected areas.....                   | 62       |
| 11.08 HIV prevalence .....                                      | 1        |                                                         |          |
| 11.09 Malaria incidence.....                                    | 1        |                                                         |          |
| 11.11 Life expectancy .....                                     | 1        |                                                         |          |
| 11.05 Extent of staff training.....                             | 3        |                                                         |          |
| 11.03 Quality of the educational system .....                   | 19       |                                                         |          |
| <b>Natural and cultural resources</b>                           |          |                                                         |          |
| 13.05 Risk of malaria and yellow fever .....                    | 1        |                                                         |          |
| 13.02 Carbon dioxide damage.....                                | 14       |                                                         |          |
| 13.04 Business concern for ecosystems .....                     | 14       |                                                         |          |
| 13.01 Number of World Heritage sites .....                      | 15       |                                                         |          |

# Jordan

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 5.4   |
| Surface area (1,000 square kilometers) .....              | 88.8  |
| Gross domestic product (US\$ billions), 2005 .....        | 12.7  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 5,096 |
| Real GDP growth (percent), 2005 .....                     | 7.2   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

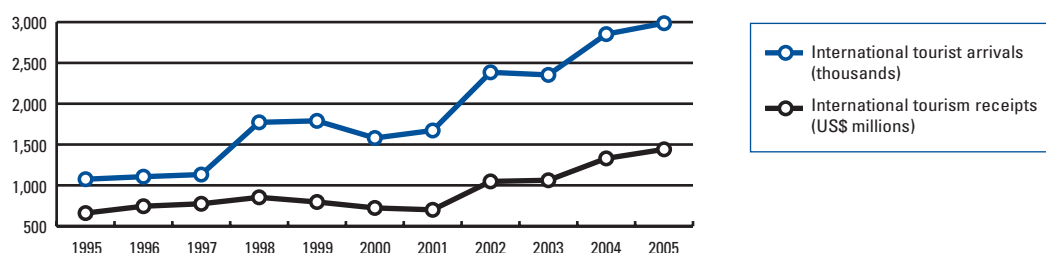
|                               |       | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 1,250 | 9.2                 | 4.2                                         |
| Employment (1,000 jobs) ..... | 147   | 8.7                 | 2.6                                         |

### T&T economy, 2006 estimates

|                               |       |      |     |
|-------------------------------|-------|------|-----|
| GDP (US\$ millions) .....     | 2,878 | 21.1 | 3.9 |
| Employment (1,000 jobs) ..... | 326   | 19.5 | 2.4 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 2,987 |
| International tourism receipts (US\$ millions), 2005 ..... | 1,441 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>46</b>            | <b>4.5</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>30</b>            | <b>5.1</b>           |
| Policy rules and regulations .....                           | 29                   | 5.2                  |
| Environmental regulation .....                               | 56                   | 4.2                  |
| Safety and security .....                                    | 19                   | 5.5                  |
| Health and hygiene .....                                     | 41                   | 5.4                  |
| Prioritization of T&T strategies .....                       | 17                   | 5.1                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>54</b>            | <b>3.6</b>           |
| Air transport infrastructure .....                           | 67                   | 2.9                  |
| Ground transport infrastructure .....                        | 47                   | 3.9                  |
| Tourism infrastructure .....                                 | 49                   | 3.6                  |
| ICT infrastructure .....                                     | 72                   | 2.4                  |
| Price competitiveness in T&T industry .....                  | 12                   | 5.4                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>58</b>            | <b>4.8</b>           |
| Human resources .....                                        | 63                   | 5.1                  |
| Education and training .....                                 | 51                   | 4.9                  |
| Availability of qualified labor .....                        | 92                   | 3.9                  |
| Workforce wellness .....                                     | 38                   | 6.6                  |
| National tourism perception .....                            | 34                   | 5.5                  |
| Natural and cultural resources .....                         | 86                   | 3.8                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                           | Rank/124 | COMPETITIVE DISADVANTAGES                                         | Rank/124 |
|------------------------------------------------------------------|----------|-------------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                              |          | <b>Policy rules and regulations</b>                               |          |
| 1.04 Visa requirements .....15                                   |          | 1.02 Property rights .....46                                      |          |
| 1.01 Foreign ownership restrictions.....20                       |          |                                                                   |          |
| 1.03 Rules governing foreign direct investment .....26           |          | <b>Environmental regulation</b>                                   |          |
| 1.05 Openness of bilateral Air Service Agreements .....36        |          | 2.01 Stringency of environmental regulation .....58               |          |
|                                                                  |          | 2.02 Clarity and stability of environmental regulations .....58   |          |
| <b>Environmental regulation</b>                                  |          |                                                                   |          |
| 2.03 Government prioritization of sustainable T&T .....34        |          | <b>Safety and security</b>                                        |          |
|                                                                  |          | 3.01 Business costs of terrorism .....96                          |          |
| <b>Safety and security</b>                                       |          |                                                                   |          |
| 3.02 Reliability of police services .....10                      |          | <b>Health and hygiene</b>                                         |          |
| 3.03 Business costs of crime and violence.....10                 |          | 4.04 Access to improved drinking water .....58                    |          |
|                                                                  |          | 4.02 Physician density .....50                                    |          |
| <b>Health and hygiene</b>                                        |          |                                                                   |          |
| 4.01 Gov't efforts to reduce health risks from pandemics .....30 |          | <b>Prioritization of Travel &amp; Tourism</b>                     |          |
| 4.03 Access to improved sanitation .....42                       |          | 5.03 Effectiveness of marketing and branding .....48              |          |
|                                                                  |          | 5.04 T&T fair attendance .....48                                  |          |
| <b>Prioritization of Travel &amp; Tourism</b>                    |          |                                                                   |          |
| 5.02 T&T government expenditure .....7                           |          | <b>Air transport infrastructure</b>                               |          |
| 5.01 Government prioritization of the T&T industry .....22       |          | 6.04 Airport density .....91                                      |          |
|                                                                  |          | 6.02 Available seat kilometers.....64                             |          |
| <b>Air transport infrastructure</b>                              |          | 6.05 Number of operating airlines.....63                          |          |
| 6.06 International air transport network .....32                 |          | 6.03 Departures per 1,000 population.....55                       |          |
|                                                                  |          | 6.01 Quality of air transport infrastructure .....48              |          |
| <b>Ground transport infrastructure</b>                           |          |                                                                   |          |
| 7.01 Road infrastructure .....33                                 |          | <b>Ground transport infrastructure</b>                            |          |
| 7.04 Domestic transport network .....42                          |          | 7.02 Railroad infrastructure .....75                              |          |
|                                                                  |          | 7.03 Port infrastructure .....49                                  |          |
| <b>Tourism infrastructure</b>                                    |          |                                                                   |          |
| 8.02 Presence of major car rental companies.....1                |          | <b>Tourism infrastructure</b>                                     |          |
|                                                                  |          | 8.03 ATMs accepting Visa cards .....64                            |          |
| <b>Price competitiveness in the T&amp;T industry</b>             |          | 8.01 Hotel rooms.....56                                           |          |
| 10.04 Fuel price level .....7                                    |          |                                                                   |          |
| 10.01 Ticket taxes and airport charges.....24                    |          | <b>ICT infrastructure</b>                                         |          |
|                                                                  |          | 9.03 Telephone lines.....79                                       |          |
| <b>Human resources</b>                                           |          | 9.01 Extent of business Internet use .....67                      |          |
| 11.08 HIV prevalence .....1                                      |          | 9.02 Internet users .....63                                       |          |
| 11.09 Malaria incidence.....1                                    |          |                                                                   |          |
| 11.10 Tuberculosis incidence .....8                              |          | <b>Price competitiveness in the T&amp;T industry</b>              |          |
| 11.03 Quality of the educational system .....44                  |          | 10.02 Purchasing power parity .....57                             |          |
|                                                                  |          | 10.03 Extent and effect of taxation .....50                       |          |
| <b>National tourism perception</b>                               |          |                                                                   |          |
| 12.01 Tourism openness .....19                                   |          | <b>Human resources</b>                                            |          |
| 12.03 Recommendation to extend business trips .....29            |          | 11.01 Primary education enrollment .....92                        |          |
|                                                                  |          | 11.06 Hiring and firing practices.....90                          |          |
|                                                                  |          | 11.07 Ease of hiring foreign labor .....83                        |          |
|                                                                  |          | 11.11 Life expectancy .....66                                     |          |
|                                                                  |          | 11.04 Local availability of research and training services.....62 |          |
|                                                                  |          | 11.05 Extent of staff training.....60                             |          |
|                                                                  |          | 11.02 Secondary education enrollment.....59                       |          |
|                                                                  |          |                                                                   |          |
|                                                                  |          | <b>National tourism perception</b>                                |          |
|                                                                  |          | 12.02 Attitude toward tourists .....67                            |          |
|                                                                  |          |                                                                   |          |
|                                                                  |          | <b>Natural and cultural resources</b>                             |          |
|                                                                  |          | 13.02 Carbon dioxide damage.....96                                |          |
|                                                                  |          | 13.03 Nationally protected areas.....92                           |          |
|                                                                  |          | 13.04 Business concern for ecosystems .....73                     |          |
|                                                                  |          | 13.01 Number of World Heritage sites .....60                      |          |

# Kazakhstan

## Key indicators

|                                                           |         |
|-----------------------------------------------------------|---------|
| Population (millions), 2005 .....                         | 15.1    |
| Surface area (1,000 square kilometers) .....              | 2,724.9 |
| Gross domestic product (US\$ billions), 2005 .....        | 56.1    |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 8,318   |
| Real GDP growth (percent), 2005 .....                     | 9.4     |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

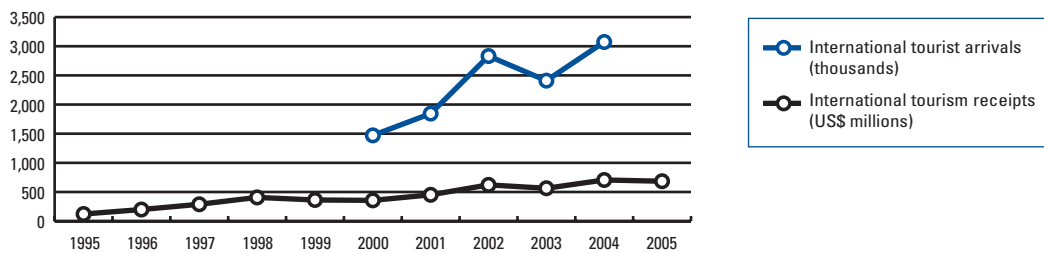
|                               | Percent of total | 2007–2016 annual growth (% forecast) |
|-------------------------------|------------------|--------------------------------------|
| GDP (US\$ millions) .....     | n/a              | n/a                                  |
| Employment (1,000 jobs) ..... | n/a              | n/a                                  |

### T&T economy, 2006 estimates

|                               |     |     |     |
|-------------------------------|-----|-----|-----|
| GDP (US\$ millions) .....     | n/a | n/a | n/a |
| Employment (1,000 jobs) ..... | n/a | n/a | n/a |

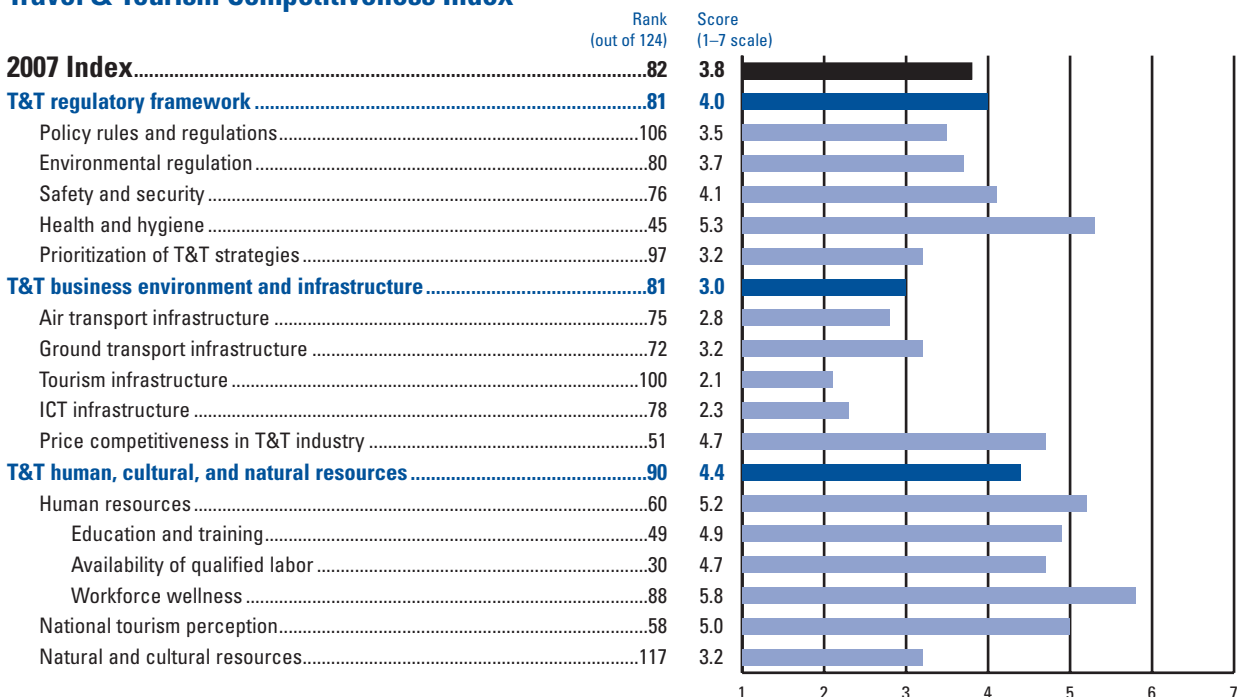
Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2004 .....         | 3,073 |
| International tourism receipts (US\$ millions), 2005 ..... | 685   |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index



Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               |                                               | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                            | Rank/124 |
|------------------------------------------------------|-----------------------------------------------|----------|------------------------------------------------------|------------------------------------------------------------|----------|
| <b>Health and hygiene</b>                            |                                               |          | <b>Policy rules and regulations</b>                  |                                                            |          |
| 4.02                                                 | Physician density .....                       | 15       | 1.04                                                 | Visa requirements .....                                    | 100      |
| <b>Air transport infrastructure</b>                  |                                               |          | 1.05                                                 | Openness of bilateral Air Service Agreements .....         | 94       |
| 6.04                                                 | Airport density .....                         | 29       | 1.01                                                 | Foreign ownership restrictions .....                       | 88       |
| <b>Ground transport infrastructure</b>               |                                               |          | 1.02                                                 | Property rights .....                                      | 85       |
| 7.02                                                 | Railroad infrastructure .....                 | 46       | 1.03                                                 | Rules governing foreign direct investment .....            | 85       |
| <b>Price competitiveness in the T&amp;T industry</b> |                                               |          | <b>Environmental regulation</b>                      |                                                            |          |
| 10.04                                                | Fuel price level .....                        | 20       | 2.03                                                 | Government prioritization of sustainable T&T .....         | 93       |
| <b>Human resources</b>                               |                                               |          | 2.01                                                 | Stringency of environmental regulation .....               | 85       |
| 11.01                                                | Primary education enrollment .....            | 1        | 2.02                                                 | Clarity and stability of environmental regulations .....   | 60       |
| 11.06                                                | Hiring and firing practices .....             | 7        | <b>Safety and security</b>                           |                                                            |          |
| 11.02                                                | Secondary education enrollment .....          | 30       | 3.01                                                 | Business costs of terrorism .....                          | 89       |
| 11.08                                                | HIV prevalence .....                          | 48       | 3.02                                                 | Reliability of police services .....                       | 75       |
| 11.03                                                | Quality of the educational system .....       | 50       | 3.03                                                 | Business costs of crime and violence .....                 | 67       |
| <b>National tourism perception</b>                   |                                               |          | <b>Health and hygiene</b>                            |                                                            |          |
| 12.03                                                | Recommendation to extend business trips ..... | 6        | 4.04                                                 | Access to improved drinking water .....                    | 67       |
| 12.01                                                | Tourism openness .....                        | 49       | 4.01                                                 | Gov't efforts to reduce health risks from pandemics .....  | 63       |
|                                                      |                                               |          | 4.03                                                 | Access to improved sanitation .....                        | 62       |
|                                                      |                                               |          | <b>Prioritization of Travel &amp; Tourism</b>        |                                                            |          |
|                                                      |                                               |          | 5.01                                                 | Government prioritization of the T&T industry .....        | 90       |
|                                                      |                                               |          | 5.03                                                 | Effectiveness of marketing and branding .....              | 90       |
|                                                      |                                               |          | 5.04                                                 | T&T fair attendance .....                                  | 90       |
|                                                      |                                               |          | <b>Air transport infrastructure</b>                  |                                                            |          |
|                                                      |                                               |          | 6.03                                                 | Departures per 1,000 population .....                      | 87       |
|                                                      |                                               |          | 6.06                                                 | International air transport network .....                  | 83       |
|                                                      |                                               |          | 6.01                                                 | Quality of air transport infrastructure .....              | 72       |
|                                                      |                                               |          | 6.02                                                 | Available seat kilometers .....                            | 67       |
|                                                      |                                               |          | 6.05                                                 | Number of operating airlines .....                         | 66       |
|                                                      |                                               |          | <b>Ground transport infrastructure</b>               |                                                            |          |
|                                                      |                                               |          | 7.01                                                 | Road infrastructure .....                                  | 98       |
|                                                      |                                               |          | 7.03                                                 | Port infrastructure .....                                  | 90       |
|                                                      |                                               |          | 7.04                                                 | Domestic transport network .....                           | 59       |
|                                                      |                                               |          | <b>Tourism infrastructure</b>                        |                                                            |          |
|                                                      |                                               |          | 8.01                                                 | Hotel rooms .....                                          | 95       |
|                                                      |                                               |          | 8.02                                                 | Presence of major car rental companies .....               | 92       |
|                                                      |                                               |          | 8.03                                                 | ATMs accepting Visa cards .....                            | 63       |
|                                                      |                                               |          | <b>ICT infrastructure</b>                            |                                                            |          |
|                                                      |                                               |          | 9.02                                                 | Internet users .....                                       | 97       |
|                                                      |                                               |          | 9.01                                                 | Extent of business Internet use .....                      | 70       |
|                                                      |                                               |          | 9.03                                                 | Telephone lines .....                                      | 66       |
|                                                      |                                               |          | <b>Price competitiveness in the T&amp;T industry</b> |                                                            |          |
|                                                      |                                               |          | 10.03                                                | Extent and effect of taxation .....                        | 77       |
|                                                      |                                               |          | 10.02                                                | Purchasing power parity .....                              | 53       |
|                                                      |                                               |          | <b>Human resources</b>                               |                                                            |          |
|                                                      |                                               |          | 11.07                                                | Ease of hiring foreign labor .....                         | 111      |
|                                                      |                                               |          | 11.11                                                | Life expectancy .....                                      | 99       |
|                                                      |                                               |          | 11.10                                                | Tuberculosis incidence .....                               | 83       |
|                                                      |                                               |          | 11.05                                                | Extent of staff training .....                             | 79       |
|                                                      |                                               |          | 11.04                                                | Local availability of research and training services ..... | 67       |
|                                                      |                                               |          | <b>National tourism perception</b>                   |                                                            |          |
|                                                      |                                               |          | 12.02                                                | Attitude toward tourists .....                             | 71       |
|                                                      |                                               |          | <b>Natural and cultural resources</b>                |                                                            |          |
|                                                      |                                               |          | 13.02                                                | Carbon dioxide damage .....                                | 117      |
|                                                      |                                               |          | 13.03                                                | Nationally protected areas .....                           | 94       |
|                                                      |                                               |          | 13.04                                                | Business concern for ecosystems .....                      | 76       |
|                                                      |                                               |          | 13.01                                                | Number of World Heritage sites .....                       | 73       |

# Kenya

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 34.3  |
| Surface area (1,000 square kilometers) .....              | 580.4 |
| Gross domestic product (US\$ billions), 2005 .....        | 18.7  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 1,445 |
| Real GDP growth (percent), 2005 .....                     | 5.7   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

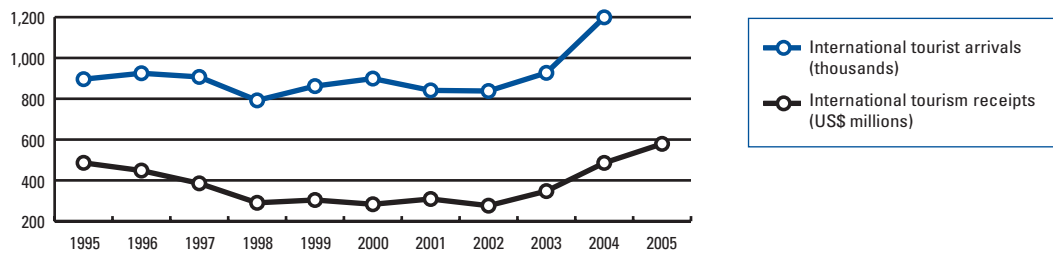
|                               |       | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 1,119 | 5.2                 | 3.9                                         |
| Employment (1,000 jobs) ..... | 253   | 4.2                 | 2.5                                         |

### T&T economy, 2006 estimates

|                               |       |      |     |
|-------------------------------|-------|------|-----|
| GDP (US\$ millions) .....     | 2,431 | 11.4 | 3.8 |
| Employment (1,000 jobs) ..... | 556   | 9.2  | 2.5 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2004 .....         | 1,199 |
| International tourism receipts (US\$ millions), 2005 ..... | 579   |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>98</b>            | <b>3.6</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>91</b>            | <b>3.8</b>           |
| Policy rules and regulations .....                           | 116                  | 3.3                  |
| Environmental regulation .....                               | 60                   | 4.1                  |
| Safety and security .....                                    | 116                  | 3.1                  |
| Health and hygiene .....                                     | 106                  | 3.3                  |
| Prioritization of T&T strategies .....                       | 19                   | 5.0                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>86</b>            | <b>2.9</b>           |
| Air transport infrastructure .....                           | 71                   | 2.8                  |
| Ground transport infrastructure .....                        | 84                   | 2.9                  |
| Tourism infrastructure .....                                 | 71                   | 2.7                  |
| ICT infrastructure .....                                     | 93                   | 2.0                  |
| Price competitiveness in T&T industry .....                  | 82                   | 4.2                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>107</b>           | <b>4.2</b>           |
| Human resources .....                                        | 100                  | 4.2                  |
| Education and training .....                                 | 74                   | 4.5                  |
| Availability of qualified labor .....                        | 56                   | 4.4                  |
| Workforce wellness .....                                     | 106                  | 3.6                  |
| National tourism perception .....                            | 75                   | 4.7                  |
| Natural and cultural resources .....                         | 98                   | 3.6                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                             | Rank/124 | COMPETITIVE DISADVANTAGES                                        | Rank/124 |
|--------------------------------------------------------------------|----------|------------------------------------------------------------------|----------|
| <b>Environmental regulation</b>                                    |          | <b>Policy rules and regulations</b>                              |          |
| 2.03 Government prioritization of sustainable T&T .....47          |          | 1.04 Visa requirements .....113                                  |          |
| <b>Prioritization of Travel &amp; Tourism</b>                      |          | 1.05 Openness of bilateral Air Service Agreements .....108       |          |
| 5.02 T&T government expenditure .....18                            |          | 1.03 Rules governing foreign direct investment .....90           |          |
| 5.04 T&T fair attendance .....23                                   |          | 1.02 Property rights .....83                                     |          |
| 5.03 Effectiveness of marketing and branding .....26               |          | 1.01 Foreign ownership restrictions .....60                      |          |
| 5.01 Government prioritization of the T&T industry .....35         |          | <b>Environmental regulation</b>                                  |          |
| <b>Air transport infrastructure</b>                                |          | 2.01 Stringency of environmental regulation .....63              |          |
| 6.01 Quality of air transport infrastructure .....50               |          | 2.02 Clarity and stability of environmental regulations .....63  |          |
| <b>Price competitiveness in the T&amp;T industry</b>               |          | <b>Safety and security</b>                                       |          |
| 10.02 Purchasing power parity .....47                              |          | 3.01 Business costs of terrorism .....117                        |          |
| <b>Human resources</b>                                             |          | 3.03 Business costs of crime and violence .....114               |          |
| 11.01 Primary education enrollment .....1                          |          | 3.02 Reliability of police services .....90                      |          |
| 11.06 Hiring and firing practices .....30                          |          | <b>Health and hygiene</b>                                        |          |
| 11.03 Quality of the educational system .....37                    |          | 4.02 Physician density .....107                                  |          |
| 11.04 Local availability of research and training services .....49 |          | 4.04 Access to improved drinking water .....99                   |          |
| <b>National tourism perception</b>                                 |          | 4.03 Access to improved sanitation .....86                       |          |
| 12.02 Attitude toward tourists .....18                             |          | 4.01 Gov't efforts to reduce health risks from pandemics .....71 |          |
|                                                                    |          | <b>Air transport infrastructure</b>                              |          |
|                                                                    |          | 6.03 Departures per 1,000 population .....81                     |          |
|                                                                    |          | 6.04 Airport density .....63                                     |          |
|                                                                    |          | 6.06 International air transport network .....59                 |          |
|                                                                    |          | 6.05 Number of operating airlines .....53                        |          |
|                                                                    |          | 6.02 Available seat kilometers .....51                           |          |
|                                                                    |          | <b>Ground transport infrastructure</b>                           |          |
|                                                                    |          | 7.01 Road infrastructure .....101                                |          |
|                                                                    |          | 7.02 Railroad infrastructure .....78                             |          |
|                                                                    |          | 7.03 Port infrastructure .....74                                 |          |
|                                                                    |          | 7.04 Domestic transport network .....73                          |          |
|                                                                    |          | <b>Tourism infrastructure</b>                                    |          |
|                                                                    |          | 8.03 ATMs accepting Visa cards .....95                           |          |
|                                                                    |          | 8.02 Presence of major car rental companies .....66              |          |
|                                                                    |          | <b>ICT infrastructure</b>                                        |          |
|                                                                    |          | 9.03 Telephone lines .....108                                    |          |
|                                                                    |          | 9.02 Internet users .....87                                      |          |
|                                                                    |          | 9.01 Extent of business Internet use .....69                     |          |
|                                                                    |          | <b>Price competitiveness in the T&amp;T industry</b>             |          |
|                                                                    |          | 10.03 Extent and effect of taxation .....106                     |          |
|                                                                    |          | 10.01 Ticket taxes and airport charges .....100                  |          |
|                                                                    |          | 10.04 Fuel price level .....69                                   |          |
|                                                                    |          | <b>Human resources</b>                                           |          |
|                                                                    |          | 11.10 Tuberculosis incidence .....124                            |          |
|                                                                    |          | 11.08 HIV prevalence .....114                                    |          |
|                                                                    |          | 11.11 Life expectancy .....107                                   |          |
|                                                                    |          | 11.09 Malaria incidence .....101                                 |          |
|                                                                    |          | 11.02 Secondary education enrollment .....99                     |          |
|                                                                    |          | 11.07 Ease of hiring foreign labor .....88                       |          |
|                                                                    |          | 11.05 Extent of staff training .....56                           |          |
|                                                                    |          | <b>National tourism perception</b>                               |          |
|                                                                    |          | 12.01 Tourism openness .....77                                   |          |
|                                                                    |          | 12.03 Recommendation to extend business trips .....57            |          |
|                                                                    |          | <b>Natural and cultural resources</b>                            |          |
|                                                                    |          | 13.05 Risk of malaria and yellow fever .....103                  |          |
|                                                                    |          | 13.04 Business concern for ecosystems .....72                    |          |
|                                                                    |          | 13.01 Number of World Heritage sites .....60                     |          |
|                                                                    |          | 13.02 Carbon dioxide damage .....57                              |          |
|                                                                    |          | 13.03 Nationally protected areas .....53                         |          |



# Korea, Rep.

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 48.3   |
| Surface area (1,000 square kilometers) .....              | 99.3   |
| Gross domestic product (US\$ billions), 2005 .....        | 787.6  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 20,590 |
| Real GDP growth (percent), 2005 .....                     | 4.0    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

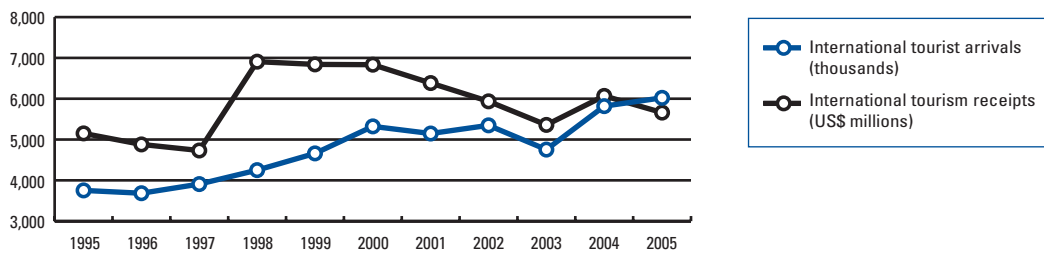
|                               |        | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|--------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 13,068 | 1.5                 | 4.1                                         |
| Employment (1,000 jobs) ..... | 477    | 2.1                 | 0.6                                         |

### T&T economy, 2006 estimates

|                               |        |     |     |
|-------------------------------|--------|-----|-----|
| GDP (US\$ millions) .....     | 61,035 | 6.8 | 5.0 |
| Employment (1,000 jobs) ..... | 1,731  | 7.4 | 1.2 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 6,022 |
| International tourism receipts (US\$ millions), 2005 ..... | 5,660 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>42</b>            | <b>4.6</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>46</b>            | <b>4.6</b>           |
| Policy rules and regulations .....                           | 56                   | 4.8                  |
| Environmental regulation .....                               | 37                   | 4.6                  |
| Safety and security .....                                    | 37                   | 5.0                  |
| Health and hygiene .....                                     | 60                   | 4.8                  |
| Prioritization of T&T strategies .....                       | 58                   | 3.9                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>24</b>            | <b>4.5</b>           |
| Air transport infrastructure .....                           | 24                   | 4.1                  |
| Ground transport infrastructure .....                        | 19                   | 5.3                  |
| Tourism infrastructure .....                                 | 68                   | 2.9                  |
| ICT infrastructure .....                                     | 3                    | 5.8                  |
| Price competitiveness in T&T industry .....                  | 84                   | 4.2                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>73</b>            | <b>4.7</b>           |
| Human resources .....                                        | 48                   | 5.2                  |
| Education and training .....                                 | 25                   | 5.5                  |
| Availability of qualified labor .....                        | 97                   | 3.8                  |
| Workforce wellness .....                                     | 60                   | 6.5                  |
| National tourism perception .....                            | 118                  | 3.9                  |
| Natural and cultural resources .....                         | 37                   | 4.9                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                            | Rank/124 | COMPETITIVE DISADVANTAGES                                  | Rank/124 |
|-------------------------------------------------------------------|----------|------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                               |          | <b>Policy rules and regulations</b>                        |          |
| 1.04 Visa requirements .....15                                    |          | 1.01 Foreign ownership restrictions.....95                 |          |
| 1.02 Property rights.....34                                       |          | 1.03 Rules governing foreign direct investment .....93     |          |
| 1.05 Openness of bilateral Air Service Agreements .....41         |          |                                                            |          |
| <b>Environmental regulation</b>                                   |          | <b>Environmental regulation</b>                            |          |
| 2.02 Clarity and stability of environmental regulations .....29   |          | 2.03 Government prioritization of sustainable T&T .....64  |          |
| 2.01 Stringency of environmental regulation .....40               |          |                                                            |          |
| <b>Safety and security</b>                                        |          | <b>Safety and security</b>                                 |          |
| 3.02 Reliability of police services .....39                       |          | 3.01 Business costs of terrorism .....63                   |          |
|                                                                   |          | 3.03 Business costs of crime and violence.....46           |          |
| <b>Health and hygiene</b>                                         |          | <b>Health and hygiene</b>                                  |          |
| 4.01 Gov't efforts to reduce health risks from pandemics .....39  |          | 4.02 Physician density .....58                             |          |
|                                                                   |          | 4.04 Access to improved drinking water .....53             |          |
| <b>Prioritization of Travel &amp; Tourism</b>                     |          | <b>Prioritization of Travel &amp; Tourism</b>              |          |
| 5.04 T&T fair attendance .....15                                  |          | 5.01 Government prioritization of the T&T industry .....88 |          |
|                                                                   |          | 5.02 T&T government expenditure .....73                    |          |
|                                                                   |          | 5.03 Effectiveness of marketing and branding .....73       |          |
| <b>Air transport infrastructure</b>                               |          | <b>Air transport infrastructure</b>                        |          |
| 6.02 Available seat kilometers.....19                             |          | 6.04 Airport density .....84                               |          |
| 6.01 Quality of air transport infrastructure .....32              |          |                                                            |          |
| 6.05 Number of operating airlines.....33                          |          | <b>Tourism infrastructure</b>                              |          |
| 6.06 International air transport network .....37                  |          | 8.01 Hotel rooms.....80                                    |          |
| <b>Ground transport infrastructure</b>                            |          | 8.02 Presence of major car rental companies.....66         |          |
| 7.02 Railroad infrastructure .....13                              |          |                                                            |          |
| 7.01 Road infrastructure .....25                                  |          | <b>Price competitiveness in the T&amp;T industry</b>       |          |
| 7.03 Port infrastructure .....27                                  |          | 10.02 Purchasing power parity .....90                      |          |
| 7.04 Domestic transport network .....27                           |          | 10.04 Fuel price level .....88                             |          |
|                                                                   |          | 10.03 Extent and effect of taxation.....72                 |          |
| <b>Tourism infrastructure</b>                                     |          |                                                            |          |
| 8.03 ATMs accepting Visa cards .....29                            |          | <b>Human resources</b>                                     |          |
|                                                                   |          | 11.07 Ease of hiring foreign labor .....118                |          |
| <b>ICT infrastructure</b>                                         |          | 11.10 Tuberculosis incidence .....77                       |          |
| 9.01 Extent of business Internet use .....1                       |          | 11.06 Hiring and firing practices.....66                   |          |
| 9.02 Internet users .....4                                        |          | 11.02 Secondary education enrollment.....49                |          |
| 9.03 Telephone lines.....14                                       |          |                                                            |          |
| <b>Price competitiveness in the T&amp;T industry</b>              |          | <b>National tourism perception</b>                         |          |
| 10.01 Ticket taxes and airport charges.....28                     |          | 12.03 Recommendation to extend business trips .....120     |          |
|                                                                   |          | 12.02 Attitude toward tourists .....111                    |          |
| <b>Human resources</b>                                            |          | 12.01 Tourism openness .....81                             |          |
| 11.01 Primary education enrollment .....1                         |          |                                                            |          |
| 11.08 HIV prevalence .....1                                       |          | <b>Natural and cultural resources</b>                      |          |
| 11.05 Extent of staff training.....18                             |          | 13.02 Carbon dioxide damage.....67                         |          |
| 11.04 Local availability of research and training services.....29 |          | 13.03 Nationally protected areas.....61                    |          |
| 11.11 Life expectancy .....29                                     |          | 13.04 Business concern for ecosystems .....44              |          |
| 11.03 Quality of the educational system .....38                   |          |                                                            |          |
| <b>Natural and cultural resources</b>                             |          |                                                            |          |
| 13.01 Number of World Heritage sites .....30                      |          |                                                            |          |

# Kuwait

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 2.5    |
| Surface area (1,000 square kilometers) .....              | 17.8   |
| Gross domestic product (US\$ billions), 2005 .....        | 74.6   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 16,301 |
| Real GDP growth (percent), 2005 .....                     | 8.5    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

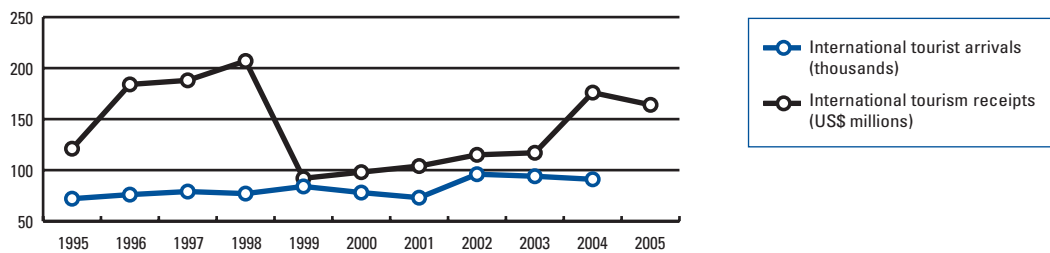
|                               |     | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-----|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 923 | 1.3                 | 5.9                                         |
| Employment (1,000 jobs) ..... | 22  | 1.9                 | 7.0                                         |

### T&T economy, 2006 estimates

|                               |       |     |     |
|-------------------------------|-------|-----|-----|
| GDP (US\$ millions) .....     | 4,999 | 7.3 | 3.7 |
| Employment (1,000 jobs) ..... | 87    | 7.3 | 5.2 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2004 .....         | 91  |
| International tourism receipts (US\$ millions), 2005 ..... | 164 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index .....</b>                                      | <b>67</b>            | <b>4.1</b>           |
| <b>T&amp;T regulatory framework .....</b>                    | <b>71</b>            | <b>4.1</b>           |
| Policy rules and regulations .....                           | 100                  | 3.7                  |
| Environmental regulation .....                               | 96                   | 3.4                  |
| Safety and security .....                                    | 22                   | 5.4                  |
| Health and hygiene .....                                     | 37                   | 5.7                  |
| Prioritization of T&T strategies .....                       | 120                  | 2.3                  |
| <b>T&amp;T business environment and infrastructure .....</b> | <b>50</b>            | <b>3.7</b>           |
| Air transport infrastructure .....                           | 62                   | 3.1                  |
| Ground transport infrastructure .....                        | 43                   | 4.0                  |
| Tourism infrastructure .....                                 | 52                   | 3.5                  |
| ICT infrastructure .....                                     | 53                   | 3.0                  |
| Price competitiveness in T&T industry .....                  | 29                   | 5.0                  |
| <b>T&amp;T human, cultural, and natural resources .....</b>  | <b>86</b>            | <b>4.5</b>           |
| Human resources .....                                        | 16                   | 5.6                  |
| Education and training .....                                 | 55                   | 4.9                  |
| Availability of qualified labor .....                        | 12                   | 5.3                  |
| Workforce wellness .....                                     | 32                   | 6.8                  |
| National tourism perception .....                            | 117                  | 3.9                  |
| Natural and cultural resources .....                         | 89                   | 3.8                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                           | Rank/124 | COMPETITIVE DISADVANTAGES                                         | Rank/124 |
|------------------------------------------------------------------|----------|-------------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                              |          | <b>Policy rules and regulations</b>                               |          |
| 1.04 Visa requirements .....43                                   |          | 1.01 Foreign ownership restrictions.....124                       |          |
|                                                                  |          | 1.03 Rules governing foreign direct investment .....122           |          |
| <b>Safety and security</b>                                       |          | 1.05 Openness of bilateral Air Service Agreements .....119        |          |
| 3.03 Business costs of crime and violence.....20                 |          | 1.02 Property rights.....54                                       |          |
| 3.02 Reliability of police services .....26                      |          |                                                                   |          |
|                                                                  |          | <b>Environmental regulation</b>                                   |          |
| <b>Health and hygiene</b>                                        |          | 2.03 Government prioritization of sustainable T&T .....111        |          |
| 4.03 Access to improved sanitation .....1                        |          | 2.01 Stringency of environmental regulation .....81               |          |
| 4.04 Access to improved drinking water .....1                    |          | 2.02 Clarity and stability of environmental regulations .....73   |          |
| 4.01 Gov't efforts to reduce health risks from pandemics .....11 |          |                                                                   |          |
|                                                                  |          | <b>Safety and security</b>                                        |          |
| <b>Air transport infrastructure</b>                              |          | 3.01 Business costs of terrorism .....71                          |          |
| 6.03 Departures per 1,000 population.....35                      |          |                                                                   |          |
| 6.05 Number of operating airlines.....43                         |          | <b>Health and hygiene</b>                                         |          |
| 6.01 Quality of air transport infrastructure .....47             |          | 4.02 Physician density.....59                                     |          |
|                                                                  |          |                                                                   |          |
| <b>Ground transport infrastructure</b>                           |          | <b>Prioritization of Travel &amp; Tourism</b>                     |          |
| 7.01 Road infrastructure .....27                                 |          | 5.01 Government prioritization of the T&T industry.....119        |          |
| 7.04 Domestic transport network .....41                          |          | 5.03 Effectiveness of marketing and branding .....116             |          |
| 7.03 Port infrastructure .....47                                 |          | 5.02 T&T government expenditure .....103                          |          |
|                                                                  |          | 5.04 T&T fair attendance .....90                                  |          |
| <b>Tourism infrastructure</b>                                    |          |                                                                   |          |
| 8.02 Presence of major car rental companies.....1                |          | <b>Air transport infrastructure</b>                               |          |
|                                                                  |          | 6.04 Airport density .....91                                      |          |
| <b>ICT infrastructure</b>                                        |          | 6.02 Available seat kilometers.....54                             |          |
| 9.02 Internet users .....44                                      |          | 6.06 International air transport network .....54                  |          |
|                                                                  |          |                                                                   |          |
| <b>Price competitiveness in the T&amp;T industry</b>             |          | <b>Ground transport infrastructure</b>                            |          |
| 10.01 Ticket taxes and airport charges.....1                     |          | 7.02 Railroad infrastructure .....79                              |          |
| 10.03 Extent and effect of taxation.....4                        |          |                                                                   |          |
| 10.04 Fuel price level .....10                                   |          | <b>Tourism infrastructure</b>                                     |          |
|                                                                  |          | 8.01 Hotel rooms.....72                                           |          |
| <b>Human resources</b>                                           |          | 8.03 ATMs accepting Visa cards .....57                            |          |
| 11.07 Ease of hiring foreign labor .....1                        |          |                                                                   |          |
| 11.08 HIV prevalence .....1                                      |          | <b>ICT infrastructure</b>                                         |          |
| 11.09 Malaria incidence.....1                                    |          | 9.01 Extent of business Internet use .....68                      |          |
| 11.11 Life expectancy .....29                                    |          | 9.03 Telephone lines.....61                                       |          |
| 11.10 Tuberculosis incidence .....37                             |          |                                                                   |          |
| 11.06 Hiring and firing practices.....41                         |          | <b>Price competitiveness in the T&amp;T industry</b>              |          |
| 11.05 Extent of staff training.....46                            |          | 10.02 Purchasing power parity.....122                             |          |
|                                                                  |          |                                                                   |          |
| <b>National tourism perception</b>                               |          | <b>Human resources</b>                                            |          |
| 12.01 Tourism openness .....36                                   |          | 11.01 Primary education enrollment .....101                       |          |
|                                                                  |          | 11.03 Quality of the educational system .....62                   |          |
| <b>Natural and cultural resources</b>                            |          | 11.04 Local availability of research and training services.....53 |          |
| 13.05 Risk of malaria and yellow fever .....1                    |          | 11.02 Secondary education enrollment.....51                       |          |
|                                                                  |          |                                                                   |          |
|                                                                  |          | <b>National tourism perception</b>                                |          |
|                                                                  |          | 12.03 Recommendation to extend business trips .....124            |          |
|                                                                  |          | 12.02 Attitude toward tourists .....121                           |          |
|                                                                  |          |                                                                   |          |
|                                                                  |          | <b>Natural and cultural resources</b>                             |          |
|                                                                  |          | 13.01 Number of World Heritage sites .....107                     |          |
|                                                                  |          | 13.03 Nationally protected areas.....100                          |          |
|                                                                  |          | 13.02 Carbon dioxide damage.....82                                |          |
|                                                                  |          | 13.04 Business concern for ecosystems .....67                     |          |

# Kyrgyz Republic

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 5.2   |
| Surface area (1,000 square kilometers) .....              | 199.9 |
| Gross domestic product (US\$ billions), 2005 .....        | 2.4   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 2,088 |
| Real GDP growth (percent), 2005 .....                     | -0.6  |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

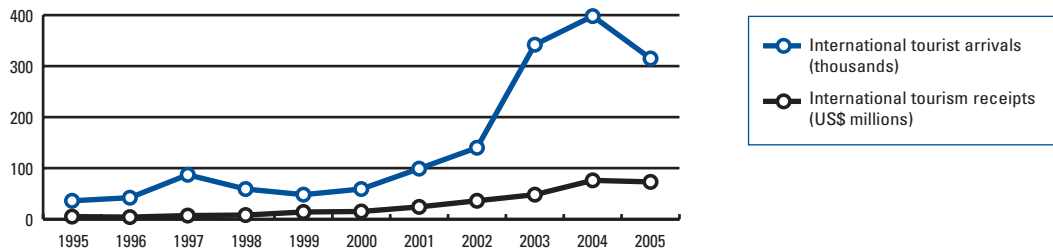
|                               | Percent of total | 2007-2016 annual growth (% forecast) |
|-------------------------------|------------------|--------------------------------------|
| GDP (US\$ millions) .....     | n/a              | n/a                                  |
| Employment (1,000 jobs) ..... | n/a              | n/a                                  |

### T&T economy, 2006 estimates

|                               |     |     |     |
|-------------------------------|-----|-----|-----|
| GDP (US\$ millions) .....     | n/a | n/a | n/a |
| Employment (1,000 jobs) ..... | n/a | n/a | n/a |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2005 .....         | 315 |
| International tourism receipts (US\$ millions), 2005 ..... | 73  |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank (out of 124) | Score (1-7 scale) |
|--------------------------------------------------------------|-------------------|-------------------|
| <b>2007 Index</b> .....                                      | <b>102</b>        | <b>3.5</b>        |
| <b>T&amp;T regulatory framework</b> .....                    | <b>111</b>        | <b>3.4</b>        |
| Policy rules and regulations .....                           | 120               | 3.1               |
| Environmental regulation .....                               | 106               | 3.2               |
| Safety and security .....                                    | 115               | 3.1               |
| Health and hygiene .....                                     | 74                | 4.3               |
| Prioritization of T&T strategies .....                       | 89                | 3.4               |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>104</b>        | <b>2.7</b>        |
| Air transport infrastructure .....                           | 107               | 2.2               |
| Ground transport infrastructure .....                        | 104               | 2.4               |
| Tourism infrastructure .....                                 | 95                | 2.2               |
| ICT infrastructure .....                                     | 99                | 1.9               |
| Price competitiveness in T&T industry .....                  | 40                | 4.8               |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>84</b>         | <b>4.5</b>        |
| Human resources .....                                        | 71                | 5.0               |
| Education and training .....                                 | 85                | 4.3               |
| Availability of qualified labor .....                        | 24                | 4.9               |
| Workforce wellness .....                                     | 81                | 6.0               |
| National tourism perception .....                            | 72                | 4.7               |
| Natural and cultural resources .....                         | 88                | 3.8               |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               |                                         | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                      | Rank/124 |
|------------------------------------------------------|-----------------------------------------|----------|------------------------------------------------------|------------------------------------------------------|----------|
| <b>Health and hygiene</b>                            |                                         |          | <b>Policy rules and regulations</b>                  |                                                      |          |
| 4.02                                                 | Physician density                       | 38       | 1.02                                                 | Property rights                                      | 118      |
| <b>Air transport infrastructure</b>                  |                                         |          | 1.03                                                 | Rules governing foreign direct investment            | 118      |
| 6.04                                                 | Airport density                         | 47       | 1.05                                                 | Openness of bilateral Air Service Agreements         | 112      |
| <b>Price competitiveness in the T&amp;T industry</b> |                                         |          | 1.01                                                 | Foreign ownership restrictions                       | 111      |
| 10.02                                                | Purchasing power parity                 | 13       | 1.04                                                 | Visa requirements                                    | 94       |
| 10.04                                                | Fuel price level                        | 27       | <b>Environmental regulation</b>                      |                                                      |          |
| <b>Human resources</b>                               |                                         |          | 2.01                                                 | Stringency of environmental regulation               | 114      |
| 11.06                                                | Hiring and firing practices             | 9        | 2.03                                                 | Government prioritization of sustainable T&T         | 100      |
| 11.08                                                | HIV prevalence                          | 25       | 2.02                                                 | Clarity and stability of environmental regulations   | 94       |
| <b>National tourism perception</b>                   |                                         |          | <b>Safety and security</b>                           |                                                      |          |
| 12.03                                                | Recommendation to extend business trips | 31       | 3.02                                                 | Reliability of police services                       | 121      |
| <b>Natural and cultural resources</b>                |                                         |          | 3.01                                                 | Business costs of terrorism                          | 106      |
| 13.03                                                | Nationally protected areas              | 25       | 3.03                                                 | Business costs of crime and violence                 | 103      |
|                                                      |                                         |          | <b>Health and hygiene</b>                            |                                                      |          |
|                                                      |                                         |          | 4.01                                                 | Gov't efforts to reduce health risks from pandemics  | 113      |
|                                                      |                                         |          | 4.04                                                 | Access to improved drinking water                    | 91       |
|                                                      |                                         |          | 4.03                                                 | Access to improved sanitation                        | 76       |
|                                                      |                                         |          | <b>Prioritization of Travel &amp; Tourism</b>        |                                                      |          |
|                                                      |                                         |          | 5.03                                                 | Effectiveness of marketing and branding              | 100      |
|                                                      |                                         |          | 5.04                                                 | T&T fair attendance                                  | 90       |
|                                                      |                                         |          | 5.01                                                 | Government prioritization of the T&T industry        | 64       |
|                                                      |                                         |          | <b>Air transport infrastructure</b>                  |                                                      |          |
|                                                      |                                         |          | 6.06                                                 | International air transport network                  | 105      |
|                                                      |                                         |          | 6.01                                                 | Quality of air transport infrastructure              | 104      |
|                                                      |                                         |          | 6.02                                                 | Available seat kilometers                            | 92       |
|                                                      |                                         |          | 6.05                                                 | Number of operating airlines                         | 84       |
|                                                      |                                         |          | 6.03                                                 | Departures per 1,000 population                      | 75       |
|                                                      |                                         |          | <b>Ground transport infrastructure</b>               |                                                      |          |
|                                                      |                                         |          | 7.03                                                 | Port infrastructure                                  | 117      |
|                                                      |                                         |          | 7.01                                                 | Road infrastructure                                  | 115      |
|                                                      |                                         |          | 7.02                                                 | Railroad infrastructure                              | 74       |
|                                                      |                                         |          | 7.04                                                 | Domestic transport network                           | 72       |
|                                                      |                                         |          | <b>Tourism infrastructure</b>                        |                                                      |          |
|                                                      |                                         |          | 8.01                                                 | Hotel rooms                                          | 105      |
|                                                      |                                         |          | 8.03                                                 | ATMs accepting Visa cards                            | 105      |
|                                                      |                                         |          | 8.02                                                 | Presence of major car rental companies               | 66       |
|                                                      |                                         |          | <b>ICT infrastructure</b>                            |                                                      |          |
|                                                      |                                         |          | 9.01                                                 | Extent of business Internet use                      | 116      |
|                                                      |                                         |          | 9.03                                                 | Telephone lines                                      | 85       |
|                                                      |                                         |          | 9.02                                                 | Internet users                                       | 84       |
|                                                      |                                         |          | <b>Price competitiveness in the T&amp;T industry</b> |                                                      |          |
|                                                      |                                         |          | 10.03                                                | Extent and effect of taxation                        | 122      |
|                                                      |                                         |          | 10.01                                                | Ticket taxes and airport charges                     | 78       |
|                                                      |                                         |          | <b>Human resources</b>                               |                                                      |          |
|                                                      |                                         |          | 11.05                                                | Extent of staff training                             | 120      |
|                                                      |                                         |          | 11.04                                                | Local availability of research and training services | 103      |
|                                                      |                                         |          | 11.01                                                | Primary education enrollment                         | 93       |
|                                                      |                                         |          | 11.11                                                | Life expectancy                                      | 93       |
|                                                      |                                         |          | 11.07                                                | Ease of hiring foreign labor                         | 90       |
|                                                      |                                         |          | 11.10                                                | Tuberculosis incidence                               | 80       |
|                                                      |                                         |          | 11.03                                                | Quality of the educational system                    | 78       |
|                                                      |                                         |          | 11.02                                                | Secondary education enrollment                       | 58       |

(Disadvantages cont'd. from bottom of right column)

| COMPETITIVE DISADVANTAGES             |                                 | Rank/124 |
|---------------------------------------|---------------------------------|----------|
| <b>National tourism perception</b>    |                                 |          |
| 12.02                                 | Attitude toward tourists        | 87       |
| 12.01                                 | Tourism openness                | 65       |
| <b>Natural and cultural resources</b> |                                 |          |
| 13.02                                 | Carbon dioxide damage           | 111      |
| 13.01                                 | Number of World Heritage sites  | 107      |
| 13.04                                 | Business concern for ecosystems | 107      |

&lt;&lt;&lt; (Cont'd. on bottom of left column)

# Latvia

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 2.3    |
| Surface area (1,000 square kilometers) .....              | 64.6   |
| Gross domestic product (US\$ billions), 2005 .....        | 15.8   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 12,666 |
| Real GDP growth (percent), 2005 .....                     | 10.2   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

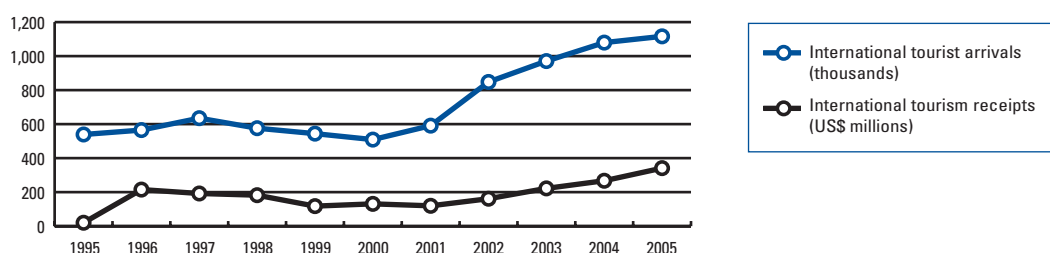
|                               |     | Percent<br>of total | 2007–2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-----|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 235 | 1.3                 | 8.0                                         |
| Employment (1,000 jobs) ..... | 12  | 1.2                 | 1.1                                         |

### T&T economy, 2006 estimates

|                               |       |     |     |
|-------------------------------|-------|-----|-----|
| GDP (US\$ millions) .....     | 1,021 | 5.8 | 7.4 |
| Employment (1,000 jobs) ..... | 51    | 5.0 | 0.6 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 1,116 |
| International tourism receipts (US\$ millions), 2005 ..... | 341   |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1–7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index .....</b>                                      | <b>53</b>            | <b>4.3</b>           |
| <b>T&amp;T regulatory framework .....</b>                    | <b>60</b>            | <b>4.3</b>           |
| Policy rules and regulations .....                           | 71                   | 4.6                  |
| Environmental regulation .....                               | 49                   | 4.3                  |
| Safety and security .....                                    | 41                   | 4.9                  |
| Health and hygiene .....                                     | 68                   | 4.6                  |
| Prioritization of T&T strategies .....                       | 94                   | 3.2                  |
| <b>T&amp;T business environment and infrastructure .....</b> | <b>41</b>            | <b>4.0</b>           |
| Air transport infrastructure .....                           | 54                   | 3.2                  |
| Ground transport infrastructure .....                        | 36                   | 4.3                  |
| Tourism infrastructure .....                                 | 37                   | 4.1                  |
| ICT infrastructure .....                                     | 36                   | 3.7                  |
| Price competitiveness in T&T industry .....                  | 55                   | 4.7                  |
| <b>T&amp;T human, cultural, and natural resources .....</b>  | <b>77</b>            | <b>4.6</b>           |
| Human resources .....                                        | 38                   | 5.3                  |
| Education and training .....                                 | 44                   | 5.1                  |
| Availability of qualified labor .....                        | 48                   | 4.5                  |
| Workforce wellness .....                                     | 64                   | 6.4                  |
| National tourism perception .....                            | 107                  | 4.3                  |
| Natural and cultural resources .....                         | 67                   | 4.3                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."



## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                          | Rank/124 | COMPETITIVE DISADVANTAGES                                      | Rank/124 |
|-----------------------------------------------------------------|----------|----------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                             |          | <b>Policy rules and regulations</b>                            |          |
| 1.04 Visa requirements .....                                    | 43       | 1.05 Openness of bilateral Air Service Agreements .....        | 106      |
| 1.01 Foreign ownership restrictions.....                        | 48       | 1.03 Rules governing foreign direct investment .....           | 75       |
| <b>Environmental regulation</b>                                 |          | 1.02 Property rights.....                                      | 51       |
| 2.02 Clarity and stability of environmental regulations .....   | 36       | <b>Environmental regulation</b>                                |          |
| 2.01 Stringency of environmental regulation .....               | 43       | 2.03 Government prioritization of sustainable T&T .....        | 84       |
| <b>Safety and security</b>                                      |          | <b>Safety and security</b>                                     |          |
| 3.03 Business costs of crime and violence.....                  | 39       | 3.02 Reliability of police services .....                      | 55       |
| 3.01 Business costs of terrorism .....                          | 50       | <b>Health and hygiene</b>                                      |          |
| <b>Health and hygiene</b>                                       |          | 4.01 Gov't efforts to reduce health risks from pandemics ..... | 75       |
| 4.02 Physician density.....                                     | 29       | <b>Prioritization of Travel &amp; Tourism</b>                  |          |
| <b>Air transport infrastructure</b>                             |          | 5.01 Government prioritization of the T&T industry.....        | 96       |
| 6.04 Airport density .....                                      | 26       | 5.03 Effectiveness of marketing and branding .....             | 84       |
| 6.01 Quality of air transport infrastructure .....              | 41       | 5.04 T&T fair attendance.....                                  | 70       |
| 6.03 Departures per 1,000 population.....                       | 44       | 5.02 T&T government expenditure .....                          | 64       |
| 6.06 International air transport network.....                   | 47       | <b>Air transport infrastructure</b>                            |          |
| <b>Ground transport infrastructure</b>                          |          | 6.02 Available seat kilometers.....                            | 85       |
| 7.02 Railroad infrastructure .....                              | 29       | 6.05 Number of operating airlines.....                         | 81       |
| 7.04 Domestic transport network .....                           | 36       | <b>Ground transport infrastructure</b>                         |          |
| 7.03 Port infrastructure .....                                  | 39       | 7.01 Road infrastructure.....                                  | 62       |
| <b>Tourism infrastructure</b>                                   |          | <b>Tourism infrastructure</b>                                  |          |
| 8.02 Presence of major car rental companies.....                | 1        | 8.01 Hotel rooms.....                                          | 55       |
| 8.03 ATMs accepting Visa cards .....                            | 27       | <b>Price competitiveness in the T&amp;T industry</b>           |          |
| <b>ICT infrastructure</b>                                       |          | 10.04 Fuel price level .....                                   | 82       |
| 9.02 Internet users .....                                       | 34       | 10.02 Purchasing power parity.....                             | 69       |
| 9.01 Extent of business Internet use .....                      | 36       | <b>Human resources</b>                                         |          |
| 9.03 Telephone lines.....                                       | 43       | 11.01 Primary education enrollment .....                       | 113      |
| <b>Price competitiveness in the T&amp;T industry</b>            |          | 11.08 HIV prevalence .....                                     | 78       |
| 10.01 Ticket taxes and airport charges.....                     | 36       | 11.11 Life expectancy .....                                    | 66       |
| 10.03 Extent and effect of taxation.....                        | 38       | 11.10 Tuberculosis incidence .....                             | 59       |
| <b>Human resources</b>                                          |          | 11.06 Hiring and firing practices.....                         | 52       |
| 11.09 Malaria incidence.....                                    | 1        | <b>National tourism perception</b>                             |          |
| 11.03 Quality of the educational system .....                   | 35       | 12.02 Attitude toward tourists .....                           | 109      |
| 11.02 Secondary education enrollment.....                       | 36       | 12.03 Recommendation to extend business trips .....            | 78       |
| 11.05 Extent of staff training.....                             | 42       | 12.01 Tourism openness .....                                   | 74       |
| 11.04 Local availability of research and training services..... | 50       | <b>Natural and cultural resources</b>                          |          |
| 11.07 Ease of hiring foreign labor .....                        | 50       | 13.01 Number of World Heritage sites .....                     | 73       |
| <b>Natural and cultural resources</b>                           |          |                                                                |          |
| 13.05 Risk of malaria and yellow fever .....                    | 1        |                                                                |          |
| 13.03 Nationally protected areas.....                           | 31       |                                                                |          |
| 13.04 Business concern for ecosystems .....                     | 45       |                                                                |          |

# Lesotho

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 1.8   |
| Surface area (1,000 square kilometers) .....              | 30.4  |
| Gross domestic product (US\$ billions), 2005 .....        | 1.5   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 2,113 |
| Real GDP growth (percent), 2005 .....                     | 1.3   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

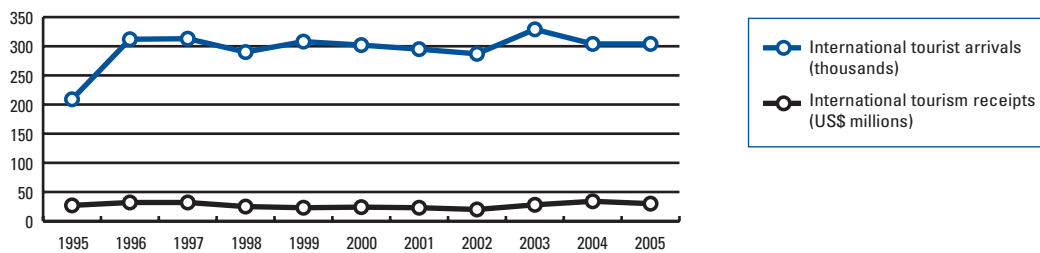
|                               |    | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|----|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 32 | 2.1                 | 2.9                                         |
| Employment (1,000 jobs) ..... | 7  | 1.7                 | -0.5                                        |

### T&T economy, 2006 estimates

|                               |     |     |      |
|-------------------------------|-----|-----|------|
| GDP (US\$ millions) .....     | 103 | 6.7 | 2.9  |
| Employment (1,000 jobs) ..... | 24  | 5.5 | -0.6 |

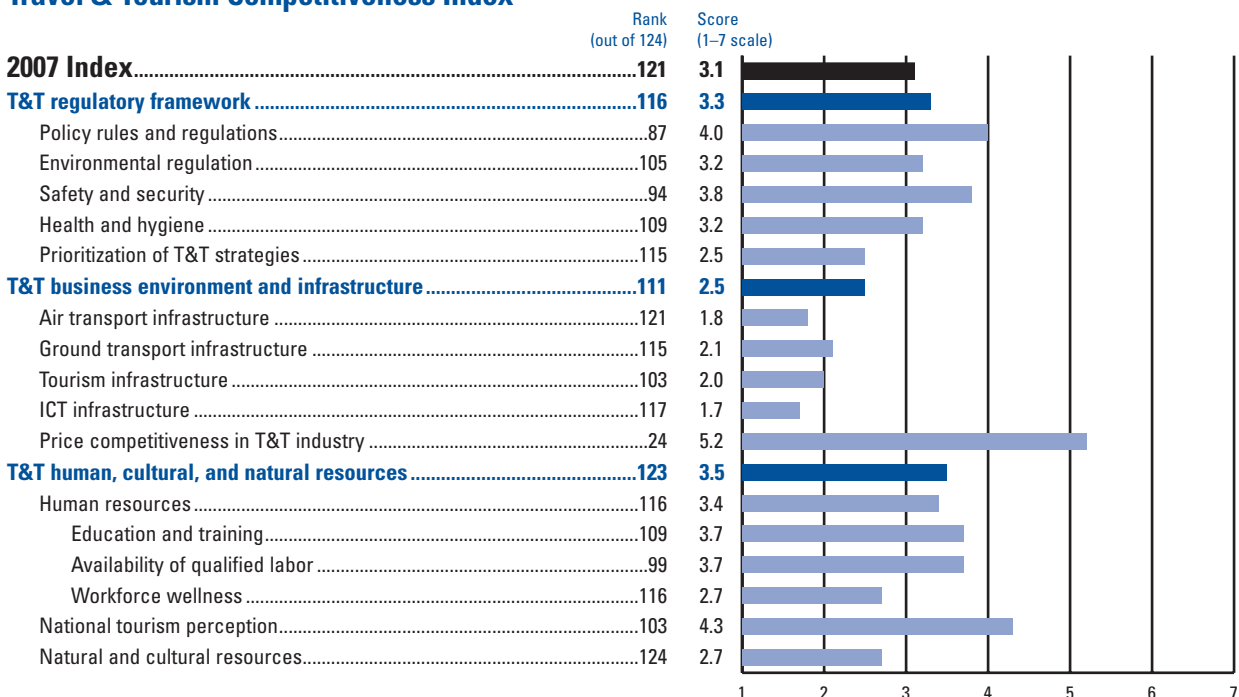
Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2005 .....         | 304 |
| International tourism receipts (US\$ millions), 2005 ..... | 30  |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index



Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               |                                        | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                            | Rank/124 |
|------------------------------------------------------|----------------------------------------|----------|------------------------------------------------------|------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                  |                                        |          | <b>Policy rules and regulations</b>                  |                                                            |          |
| 1.04                                                 | Visa requirements .....                | 43       | 1.05                                                 | Openness of bilateral Air Service Agreements .....         | 122      |
| <b>Air transport infrastructure</b>                  |                                        |          | 1.02                                                 | Property rights .....                                      | 111      |
| 6.04                                                 | Airport density .....                  | 42       | 1.03                                                 | Rules governing foreign direct investment .....            | 79       |
| <b>Price competitiveness in the T&amp;T industry</b> |                                        |          | 1.01                                                 | Foreign ownership restrictions .....                       | 52       |
| 10.01                                                | Ticket taxes and airport charges ..... | 6        | <b>Environmental regulation</b>                      |                                                            |          |
| 10.02                                                | Purchasing power parity .....          | 22       | 2.01                                                 | Stringency of environmental regulation .....               | 118      |
| <b>Human resources</b>                               |                                        |          | 2.03                                                 | Government prioritization of sustainable T&T .....         | 96       |
| 11.01                                                | Primary education enrollment .....     | 1        | 2.02                                                 | Clarity and stability of environmental regulations .....   | 95       |
| 11.09                                                | Malaria incidence .....                | 1        | <b>Safety and security</b>                           |                                                            |          |
|                                                      |                                        |          | 3.03                                                 | Business costs of crime and violence .....                 | 102      |
|                                                      |                                        |          | 3.02                                                 | Reliability of police services .....                       | 94       |
|                                                      |                                        |          | 3.01                                                 | Business costs of terrorism .....                          | 59       |
|                                                      |                                        |          | <b>Health and hygiene</b>                            |                                                            |          |
|                                                      |                                        |          | 4.02                                                 | Physician density .....                                    | 116      |
|                                                      |                                        |          | 4.03                                                 | Access to improved sanitation .....                        | 100      |
|                                                      |                                        |          | 4.01                                                 | Gov't efforts to reduce health risks from pandemics .....  | 92       |
|                                                      |                                        |          | 4.04                                                 | Access to improved drinking water .....                    | 91       |
|                                                      |                                        |          | <b>Prioritization of Travel &amp; Tourism</b>        |                                                            |          |
|                                                      |                                        |          | 5.04                                                 | T&T fair attendance .....                                  | 105      |
|                                                      |                                        |          | 5.03                                                 | Effectiveness of marketing and branding .....              | 104      |
|                                                      |                                        |          | 5.02                                                 | T&T government expenditure .....                           | 103      |
|                                                      |                                        |          | 5.01                                                 | Government prioritization of the T&T industry .....        | 102      |
|                                                      |                                        |          | <b>Air transport infrastructure</b>                  |                                                            |          |
|                                                      |                                        |          | 6.02                                                 | Available seat kilometers .....                            | 124      |
|                                                      |                                        |          | 6.05                                                 | Number of operating airlines .....                         | 124      |
|                                                      |                                        |          | 6.01                                                 | Quality of air transport infrastructure .....              | 123      |
|                                                      |                                        |          | 6.06                                                 | International air transport network .....                  | 121      |
|                                                      |                                        |          | 6.03                                                 | Departures per 1,000 population .....                      | 107      |
|                                                      |                                        |          | <b>Ground transport infrastructure</b>               |                                                            |          |
|                                                      |                                        |          | 7.04                                                 | Domestic transport network .....                           | 119      |
|                                                      |                                        |          | 7.03                                                 | Port infrastructure .....                                  | 108      |
|                                                      |                                        |          | 7.02                                                 | Railroad infrastructure .....                              | 103      |
|                                                      |                                        |          | 7.01                                                 | Road infrastructure .....                                  | 102      |
|                                                      |                                        |          | <b>Tourism infrastructure</b>                        |                                                            |          |
|                                                      |                                        |          | 8.02                                                 | Presence of major car rental companies .....               | 102      |
|                                                      |                                        |          | 8.01                                                 | Hotel rooms .....                                          | 92       |
|                                                      |                                        |          | <b>ICT infrastructure</b>                            |                                                            |          |
|                                                      |                                        |          | 9.01                                                 | Extent of business Internet use .....                      | 115      |
|                                                      |                                        |          | 9.03                                                 | Telephone lines .....                                      | 104      |
|                                                      |                                        |          | 9.02                                                 | Internet users .....                                       | 99       |
|                                                      |                                        |          | <b>Price competitiveness in the T&amp;T industry</b> |                                                            |          |
|                                                      |                                        |          | 10.03                                                | Extent and effect of taxation .....                        | 70       |
|                                                      |                                        |          | 10.04                                                | Fuel price level .....                                     | 63       |
|                                                      |                                        |          | <b>Human resources</b>                               |                                                            |          |
|                                                      |                                        |          | 11.08                                                | HIV prevalence .....                                       | 123      |
|                                                      |                                        |          | 11.11                                                | Life expectancy .....                                      | 119      |
|                                                      |                                        |          | 11.04                                                | Local availability of research and training services ..... | 117      |
|                                                      |                                        |          | 11.07                                                | Ease of hiring foreign labor .....                         | 114      |
|                                                      |                                        |          | 11.10                                                | Tuberculosis incidence .....                               | 112      |
|                                                      |                                        |          | 11.02                                                | Secondary education enrollment .....                       | 105      |
|                                                      |                                        |          | 11.05                                                | Extent of staff training .....                             | 92       |
|                                                      |                                        |          | 11.03                                                | Quality of the educational system .....                    | 85       |
|                                                      |                                        |          | 11.06                                                | Hiring and firing practices .....                          | 78       |

(Disadvantages cont'd. from bottom of right column)

<<< (Cont'd. on bottom of left column)

# Lithuania

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 3.4    |
| Surface area (1,000 square kilometers) .....              | 65.3   |
| Gross domestic product (US\$ billions), 2005 .....        | 25.5   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 14,158 |
| Real GDP growth (percent), 2005 .....                     | 7.5    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

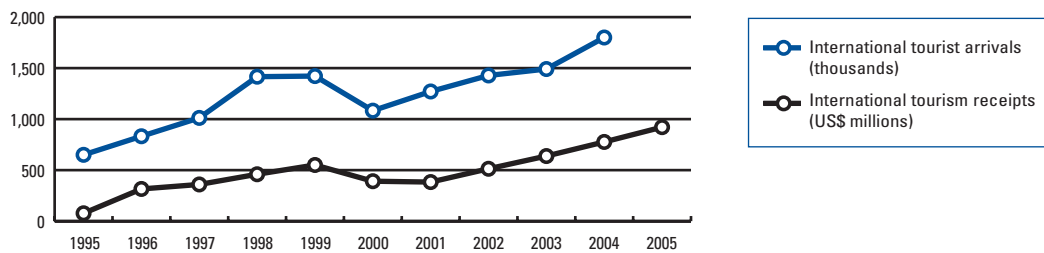
|                               |     | Percent of total | 2007–2016 annual growth (% forecast) |
|-------------------------------|-----|------------------|--------------------------------------|
| GDP (US\$ millions) .....     | 424 | 1.6              | 7.0                                  |
| Employment (1,000 jobs) ..... | 21  | 1.4              | 1.2                                  |

### T&T economy, 2006 estimates

|                               |       |     |     |
|-------------------------------|-------|-----|-----|
| GDP (US\$ millions) .....     | 2,282 | 8.8 | 6.9 |
| Employment (1,000 jobs) ..... | 112   | 7.5 | 1.1 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2004 .....         | 1,800 |
| International tourism receipts (US\$ millions), 2005 ..... | 921   |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank (out of 124) | Score (1–7 scale) |
|--------------------------------------------------------------|-------------------|-------------------|
| <b>2007 Index</b> .....                                      | <b>51</b>         | <b>4.3</b>        |
| <b>T&amp;T regulatory framework</b> .....                    | <b>57</b>         | <b>4.4</b>        |
| Policy rules and regulations .....                           | 68                | 4.6               |
| Environmental regulation .....                               | 51                | 4.3               |
| Safety and security .....                                    | 57                | 4.6               |
| Health and hygiene .....                                     | 47                | 5.2               |
| Prioritization of T&T strategies .....                       | 95                | 3.2               |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>43</b>         | <b>3.8</b>        |
| Air transport infrastructure .....                           | 61                | 3.1               |
| Ground transport infrastructure .....                        | 32                | 4.5               |
| Tourism infrastructure .....                                 | 40                | 3.8               |
| ICT infrastructure .....                                     | 40                | 3.5               |
| Price competitiveness in T&T industry .....                  | 77                | 4.3               |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>61</b>         | <b>4.8</b>        |
| Human resources .....                                        | 61                | 5.1               |
| Education and training .....                                 | 37                | 5.1               |
| Availability of qualified labor .....                        | 94                | 3.8               |
| Workforce wellness .....                                     | 58                | 6.5               |
| National tourism perception .....                            | 93                | 4.4               |
| Natural and cultural resources .....                         | 38                | 4.8               |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                            | Rank/124 | COMPETITIVE DISADVANTAGES                                        | Rank/124 |
|-------------------------------------------------------------------|----------|------------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                               |          | <b>Policy rules and regulations</b>                              |          |
| 1.04 Visa requirements .....15                                    |          | 1.03 Rules governing foreign direct investment .....97           |          |
| 1.02 Property rights.....49                                       |          | 1.05 Openness of bilateral Air Service Agreements .....84        |          |
|                                                                   |          | 1.01 Foreign ownership restrictions.....79                       |          |
| <b>Environmental regulation</b>                                   |          | <b>Environmental regulation</b>                                  |          |
| 2.01 Stringency of environmental regulation .....37               |          | 2.03 Government prioritization of sustainable T&T .....92        |          |
| 2.02 Clarity and stability of environmental regulations .....45   |          |                                                                  |          |
| <b>Safety and security</b>                                        |          | <b>Safety and security</b>                                       |          |
| 3.01 Business costs of terrorism .....34                          |          | 3.02 Reliability of police services .....76                      |          |
|                                                                   |          | 3.03 Business costs of crime and violence.....59                 |          |
| <b>Health and hygiene</b>                                         |          | <b>Health and hygiene</b>                                        |          |
| 4.02 Physician density.....7                                      |          | 4.01 Gov't efforts to reduce health risks from pandemics .....68 |          |
| <b>Prioritization of Travel &amp; Tourism</b>                     |          | <b>Prioritization of Travel &amp; Tourism</b>                    |          |
| 5.04 T&T fair attendance .....48                                  |          | 5.01 Government prioritization of the T&T industry .....108      |          |
|                                                                   |          | 5.03 Effectiveness of marketing and branding .....95             |          |
| <b>Air transport infrastructure</b>                               |          | 5.02 T&T government expenditure .....64                          |          |
| 6.04 Airport density .....18                                      |          |                                                                  |          |
| <b>Ground transport infrastructure</b>                            |          | <b>Air transport infrastructure</b>                              |          |
| 7.02 Railroad infrastructure .....28                              |          | 6.02 Available seat kilometers.....93                            |          |
| 7.01 Road infrastructure .....32                                  |          | 6.05 Number of operating airlines.....81                         |          |
| 7.04 Domestic transport network .....39                           |          | 6.01 Quality of air transport infrastructure .....62             |          |
| 7.03 Port infrastructure .....50                                  |          | 6.06 International air transport network .....60                 |          |
|                                                                   |          | 6.03 Departures per 1,000 population.....53                      |          |
| <b>Tourism infrastructure</b>                                     |          | <b>Tourism infrastructure</b>                                    |          |
| 8.02 Presence of major car rental companies.....1                 |          | 8.01 Hotel rooms.....64                                          |          |
| 8.03 ATMs accepting Visa cards .....36                            |          |                                                                  |          |
| <b>ICT infrastructure</b>                                         |          | <b>ICT infrastructure</b>                                        |          |
| 9.01 Extent of business Internet use .....29                      |          | 9.03 Telephone lines.....54                                      |          |
| 9.02 Internet users .....39                                       |          |                                                                  |          |
| <b>Human resources</b>                                            |          | <b>Price competitiveness in the T&amp;T industry</b>             |          |
| 11.09 Malaria incidence.....1                                     |          | 10.04 Fuel price level .....98                                   |          |
| 11.08 HIV prevalence .....25                                      |          | 10.02 Purchasing power parity.....66                             |          |
| 11.02 Secondary education enrollment.....28                       |          | 10.03 Extent and effect of taxation.....62                       |          |
| 11.05 Extent of staff training.....43                             |          | 10.01 Ticket taxes and airport charges.....58                    |          |
| 11.03 Quality of the educational system .....45                   |          |                                                                  |          |
| 11.04 Local availability of research and training services.....48 |          | <b>Human resources</b>                                           |          |
|                                                                   |          | 11.01 Primary education enrollment .....99                       |          |
| <b>Natural and cultural resources</b>                             |          | 11.06 Hiring and firing practices.....96                         |          |
| 13.05 Risk of malaria and yellow fever .....1                     |          | 11.07 Ease of hiring foreign labor .....78                       |          |
| 13.03 Nationally protected areas.....43                           |          | 11.10 Tuberculosis incidence .....58                             |          |
| 13.04 Business concern for ecosystems .....50                     |          | 11.11 Life expectancy .....53                                    |          |
|                                                                   |          | <b>National tourism perception</b>                               |          |
|                                                                   |          | 12.02 Attitude toward tourists .....105                          |          |
|                                                                   |          | 12.01 Tourism openness .....73                                   |          |
|                                                                   |          | 12.03 Recommendation to extend business trips .....56            |          |
|                                                                   |          | <b>Natural and cultural resources</b>                            |          |
|                                                                   |          | 13.02 Carbon dioxide damage.....68                               |          |
|                                                                   |          | 13.01 Number of World Heritage sites .....55                     |          |

# Luxembourg

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 0.5    |
| Surface area (1,000 square kilometers) .....              | 2.6    |
| Gross domestic product (US\$ billions), 2005 .....        | 36.5   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 69,800 |
| Real GDP growth (percent), 2005 .....                     | 4.0    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

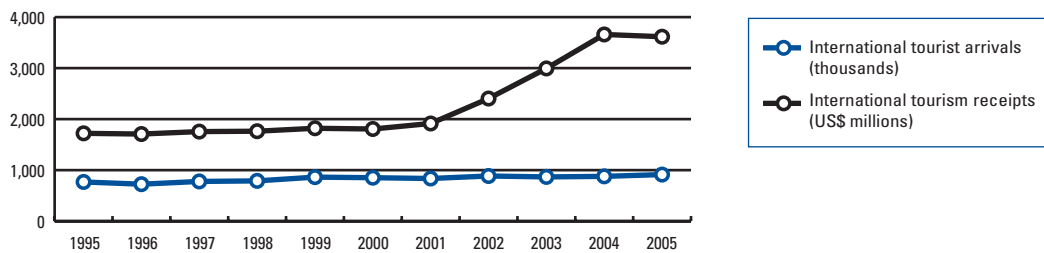
|                               |       | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 1,001 | 2.9                 | 5.6                                         |
| Employment (1,000 jobs) ..... | 7     | 3.9                 | 3.0                                         |

### T&T economy, 2006 estimates

|                               |       |      |     |
|-------------------------------|-------|------|-----|
| GDP (US\$ millions) .....     | 3,315 | 9.4  | 5.0 |
| Employment (1,000 jobs) ..... | 24    | 13.4 | 2.5 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 913   |
| International tourism receipts (US\$ millions), 2005 ..... | 3,616 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index .....</b>                                      | <b>9</b>             | <b>5.3</b>           |
| <b>T&amp;T regulatory framework .....</b>                    | <b>17</b>            | <b>5.3</b>           |
| Policy rules and regulations .....                           | 5                    | 5.7                  |
| Environmental regulation .....                               | 11                   | 5.6                  |
| Safety and security .....                                    | 13                   | 5.7                  |
| Health and hygiene .....                                     | 19                   | 6.0                  |
| Prioritization of T&T strategies .....                       | 85                   | 3.4                  |
| <b>T&amp;T business environment and infrastructure .....</b> | <b>9</b>             | <b>5.0</b>           |
| Air transport infrastructure .....                           | 38                   | 3.7                  |
| Ground transport infrastructure .....                        | 21                   | 5.1                  |
| Tourism infrastructure .....                                 | 6                    | 6.1                  |
| ICT infrastructure .....                                     | 6                    | 5.7                  |
| Price competitiveness in T&T industry .....                  | 56                   | 4.7                  |
| <b>T&amp;T human, cultural, and natural resources .....</b>  | <b>8</b>             | <b>5.6</b>           |
| Human resources .....                                        | 14                   | 5.7                  |
| Education and training .....                                 | 26                   | 5.5                  |
| Availability of qualified labor .....                        | 32                   | 4.7                  |
| Workforce wellness .....                                     | 18                   | 6.9                  |
| National tourism perception .....                            | 22                   | 5.8                  |
| Natural and cultural resources .....                         | 24                   | 5.3                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               |                                                 | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                           | Rank/124 |
|------------------------------------------------------|-------------------------------------------------|----------|------------------------------------------------------|-----------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                  |                                                 |          | <b>Policy rules and regulations</b>                  |                                                           |          |
| 1.03                                                 | Rules governing foreign direct investment ..... | 4        | 1.04                                                 | Visa requirements .....                                   | 43       |
| 1.01                                                 | Foreign ownership restrictions.....             | 10       | 1.05                                                 | Openness of bilateral Air Service Agreements .....        | 14       |
| <b>Environmental regulation</b>                      |                                                 |          | 1.02                                                 | Property rights.....                                      | 12       |
| 2.01                                                 | Stringency of environmental regulation .....    | 10       | <b>Environmental regulation</b>                      |                                                           |          |
| <b>Health and hygiene</b>                            |                                                 |          | 2.03                                                 | Government prioritization of sustainable T&T .....        | 29       |
| 4.03                                                 | Access to improved sanitation .....             | 1        | 2.02                                                 | Clarity and stability of environmental regulations .....  | 13       |
| 4.04                                                 | Access to improved drinking water .....         | 1        | <b>Safety and security</b>                           |                                                           |          |
| <b>Air transport infrastructure</b>                  |                                                 |          | 3.03                                                 | Business costs of crime and violence.....                 | 22       |
| 6.03                                                 | Departures per 1,000 population.....            | 1        | 3.01                                                 | Business costs of terrorism .....                         | 19       |
| <b>Tourism infrastructure</b>                        |                                                 |          | 3.02                                                 | Reliability of police services .....                      | 15       |
| 8.03                                                 | ATMs accepting Visa cards .....                 | 5        | <b>Health and hygiene</b>                            |                                                           |          |
| <b>ICT infrastructure</b>                            |                                                 |          | 4.02                                                 | Physician density .....                                   | 34       |
| 9.03                                                 | Telephone lines.....                            | 1        | 4.01                                                 | Gov't efforts to reduce health risks from pandemics ..... | 23       |
| <b>Price competitiveness in the T&amp;T industry</b> |                                                 |          | <b>Prioritization of Travel &amp; Tourism</b>        |                                                           |          |
| 10.01                                                | Ticket taxes and airport charges.....           | 2        | 5.01                                                 | Government prioritization of the T&T industry.....        | 97       |
| 10.03                                                | Extent and effect of taxation.....              | 9        | 5.02                                                 | T&T government expenditure .....                          | 73       |
| <b>Human resources</b>                               |                                                 |          | 5.03                                                 | Effectiveness of marketing and branding .....             | 66       |
| 11.09                                                | Malaria incidence.....                          | 1        | 5.04                                                 | T&T fair attendance .....                                 | 48       |
| <b>National tourism perception</b>                   |                                                 |          | <b>Air transport infrastructure</b>                  |                                                           |          |
| 12.01                                                | Tourism openness .....                          | 6        | 6.02                                                 | Available seat kilometers.....                            | 101      |
| <b>Natural and cultural resources</b>                |                                                 |          | 6.05                                                 | Number of operating airlines.....                         | 97       |
| 13.05                                                | Risk of malaria and yellow fever .....          | 1        | 6.04                                                 | Airport density .....                                     | 79       |
| 13.04                                                | Business concern for ecosystems .....           | 9        | 6.06                                                 | International air transport network .....                 | 39       |
|                                                      |                                                 |          | 6.01                                                 | Quality of air transport infrastructure .....             | 38       |
|                                                      |                                                 |          | <b>Ground transport infrastructure</b>               |                                                           |          |
|                                                      |                                                 |          | 7.03                                                 | Port infrastructure .....                                 | 40       |
|                                                      |                                                 |          | 7.04                                                 | Domestic transport network .....                          | 34       |
|                                                      |                                                 |          | 7.02                                                 | Railroad infrastructure .....                             | 19       |
|                                                      |                                                 |          | 7.01                                                 | Road infrastructure.....                                  | 17       |
|                                                      |                                                 |          | <b>Tourism infrastructure</b>                        |                                                           |          |
|                                                      |                                                 |          | 8.02                                                 | Presence of major car rental companies.....               | 35       |
|                                                      |                                                 |          | 8.01                                                 | Hotel rooms.....                                          | 11       |
|                                                      |                                                 |          | <b>ICT infrastructure</b>                            |                                                           |          |
|                                                      |                                                 |          | 9.01                                                 | Extent of business Internet use .....                     | 33       |
|                                                      |                                                 |          | 9.02                                                 | Internet users .....                                      | 11       |
|                                                      |                                                 |          | <b>Price competitiveness in the T&amp;T industry</b> |                                                           |          |
|                                                      |                                                 |          | 10.02                                                | Purchasing power parity.....                              | 105      |
|                                                      |                                                 |          | 10.04                                                | Fuel price level .....                                    | 94       |
|                                                      |                                                 |          | <b>Human resources</b>                               |                                                           |          |
|                                                      |                                                 |          | 11.01                                                | Primary education enrollment .....                        | 82       |
|                                                      |                                                 |          | 11.06                                                | Hiring and firing practices.....                          | 72       |
|                                                      |                                                 |          | 11.04                                                | Local availability of research and training services..... | 51       |
|                                                      |                                                 |          | 11.08                                                | HIV prevalence .....                                      | 48       |
|                                                      |                                                 |          | 11.02                                                | Secondary education enrollment.....                       | 40       |
|                                                      |                                                 |          | 11.03                                                | Quality of the educational system .....                   | 36       |
|                                                      |                                                 |          | 11.10                                                | Tuberculosis incidence .....                              | 20       |
|                                                      |                                                 |          | 11.11                                                | Life expectancy .....                                     | 15       |
|                                                      |                                                 |          | 11.05                                                | Extent of staff training.....                             | 14       |
|                                                      |                                                 |          | 11.07                                                | Ease of hiring foreign labor .....                        | 11       |
|                                                      |                                                 |          | <b>National tourism perception</b>                   |                                                           |          |
|                                                      |                                                 |          | 12.02                                                | Attitude toward tourists .....                            | 115      |
|                                                      |                                                 |          | 12.03                                                | Recommendation to extend business trips .....             | 68       |
|                                                      |                                                 |          | <b>Natural and cultural resources</b>                |                                                           |          |
|                                                      |                                                 |          | 13.01                                                | Number of World Heritage sites .....                      | 87       |
|                                                      |                                                 |          | 13.02                                                | Carbon dioxide damage.....                                | 25       |



# Macedonia, FYR

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 2.0   |
| Surface area (1,000 square kilometers) .....              | 25.7  |
| Gross domestic product (US\$ billions), 2005 .....        | 5.7   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 7,748 |
| Real GDP growth (percent), 2005 .....                     | 4.0   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

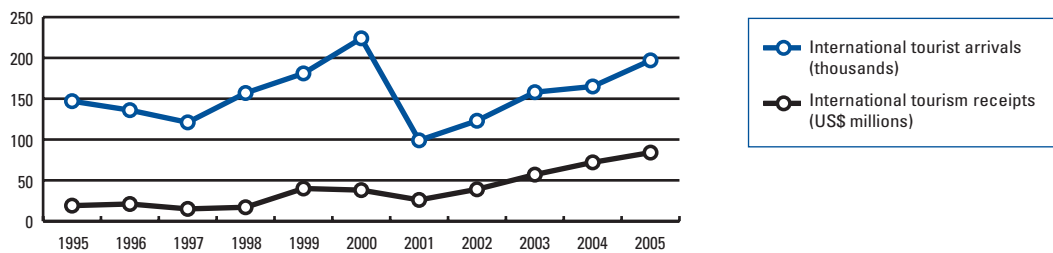
|                               |    | Percent of total | 2007–2016 annual growth (% forecast) |
|-------------------------------|----|------------------|--------------------------------------|
| GDP (US\$ millions) .....     | 87 | 1.5              | 5.5                                  |
| Employment (1,000 jobs) ..... | 10 | 1.5              | 2.6                                  |

### T&T economy, 2006 estimates

|                               |     |     |     |
|-------------------------------|-----|-----|-----|
| GDP (US\$ millions) .....     | 385 | 6.8 | 5.3 |
| Employment (1,000 jobs) ..... | 43  | 6.3 | 2.4 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2005 .....         | 197 |
| International tourism receipts (US\$ millions), 2005 ..... | 84  |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank (out of 124) | Score (1–7 scale) |
|--------------------------------------------------------------|-------------------|-------------------|
| <b>2007 Index</b> .....                                      | <b>83</b>         | <b>3.8</b>        |
| <b>T&amp;T regulatory framework</b> .....                    | <b>114</b>        | <b>3.3</b>        |
| Policy rules and regulations .....                           | 89                | 4.0               |
| Environmental regulation .....                               | 110               | 3.0               |
| Safety and security .....                                    | 97                | 3.7               |
| Health and hygiene .....                                     | 96                | 3.8               |
| Prioritization of T&T strategies .....                       | 122               | 2.2               |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>82</b>         | <b>3.0</b>        |
| Air transport infrastructure .....                           | 108               | 2.1               |
| Ground transport infrastructure .....                        | 83                | 2.9               |
| Tourism infrastructure .....                                 | 63                | 3.1               |
| ICT infrastructure .....                                     | 76                | 2.4               |
| Price competitiveness in T&T industry .....                  | 64                | 4.6               |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>44</b>         | <b>5.1</b>        |
| Human resources .....                                        | 56                | 5.2               |
| Education and training .....                                 | 64                | 4.7               |
| Availability of qualified labor .....                        | 64                | 4.3               |
| Workforce wellness .....                                     | 47                | 6.6               |
| National tourism perception .....                            | 13                | 6.1               |
| Natural and cultural resources .....                         | 82                | 3.9               |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               | Rank/124 | COMPETITIVE DISADVANTAGES                                        | Rank/124 |
|------------------------------------------------------|----------|------------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                  |          | <b>Policy rules and regulations</b>                              |          |
| 1.04 Visa requirements .....                         | 15       | 1.03 Rules governing foreign direct investment .....             | 115      |
| <b>Health and hygiene</b>                            |          | 1.05 Openness of bilateral Air Service Agreements .....          | 109      |
| 4.02 Physician density .....                         | 47       | 1.01 Foreign ownership restrictions .....                        | 108      |
| <b>Tourism infrastructure</b>                        |          | 1.02 Property rights .....                                       | 107      |
| 8.02 Presence of major car rental companies .....    | 35       | <b>Environmental regulation</b>                                  |          |
| <b>ICT infrastructure</b>                            |          | 2.03 Government prioritization of sustainable T&T .....          | 119      |
| 9.03 Telephone lines .....                           | 50       | 2.01 Stringency of environmental regulation .....                | 106      |
| <b>Price competitiveness in the T&amp;T industry</b> |          | 2.02 Clarity and stability of environmental regulations .....    | 96       |
| 10.02 Purchasing power parity .....                  | 36       | <b>Safety and security</b>                                       |          |
| 10.01 Ticket taxes and airport charges .....         | 50       | 3.01 Business costs of terrorism .....                           | 105      |
| <b>Human resources</b>                               |          | 3.03 Business costs of crime and violence .....                  | 95       |
| 11.08 HIV prevalence .....                           | 1        | 3.02 Reliability of police services .....                        | 72       |
| 11.09 Malaria incidence .....                        | 1        | <b>Health and hygiene</b>                                        |          |
| 11.10 Tuberculosis incidence .....                   | 41       | 4.01 Gov't efforts to reduce health risks from pandemics .....   | 91       |
| 11.03 Quality of the educational system .....        | 43       | <b>Prioritization of Travel &amp; Tourism</b>                    |          |
| <b>National tourism perception</b>                   |          | 5.01 Government prioritization of the T&T industry .....         | 118      |
| 12.02 Attitude toward tourists .....                 | 21       | 5.03 Effectiveness of marketing and branding .....               | 112      |
| <b>Natural and cultural resources</b>                |          | 5.04 T&T fair attendance .....                                   | 105      |
| 13.05 Risk of malaria and yellow fever .....         | 1        | 5.02 T&T government expenditure .....                            | 101      |
|                                                      |          | <b>Air transport infrastructure</b>                              |          |
|                                                      |          | 6.02 Available seat kilometers .....                             | 116      |
|                                                      |          | 6.01 Quality of air transport infrastructure .....               | 109      |
|                                                      |          | 6.06 International air transport network .....                   | 102      |
|                                                      |          | 6.05 Number of operating airlines .....                          | 94       |
|                                                      |          | 6.03 Departures per 1,000 population .....                       | 59       |
|                                                      |          | 6.04 Airport density .....                                       | 52       |
|                                                      |          | <b>Ground transport infrastructure</b>                           |          |
|                                                      |          | 7.03 Port infrastructure .....                                   | 112      |
|                                                      |          | 7.01 Road infrastructure .....                                   | 69       |
|                                                      |          | 7.02 Railroad infrastructure .....                               | 69       |
|                                                      |          | 7.04 Domestic transport network .....                            | 63       |
|                                                      |          | <b>Tourism infrastructure</b>                                    |          |
|                                                      |          | 8.03 ATMs accepting Visa cards .....                             | 86       |
|                                                      |          | 8.01 Hotel rooms .....                                           | 57       |
|                                                      |          | <b>ICT infrastructure</b>                                        |          |
|                                                      |          | 9.01 Extent of business Internet use .....                       | 117      |
|                                                      |          | 9.02 Internet users .....                                        | 73       |
|                                                      |          | <b>Price competitiveness in the T&amp;T industry</b>             |          |
|                                                      |          | 10.03 Extent and effect of taxation .....                        | 88       |
|                                                      |          | 10.04 Fuel price level .....                                     | 85       |
|                                                      |          | <b>Human resources</b>                                           |          |
|                                                      |          | 11.01 Primary education enrollment .....                         | 98       |
|                                                      |          | 11.04 Local availability of research and training services ..... | 87       |
|                                                      |          | 11.07 Ease of hiring foreign labor .....                         | 72       |
|                                                      |          | 11.05 Extent of staff training .....                             | 69       |
|                                                      |          | 11.02 Secondary education enrollment .....                       | 65       |
|                                                      |          | 11.06 Hiring and firing practices .....                          | 57       |
|                                                      |          | 11.11 Life expectancy .....                                      | 53       |
|                                                      |          | <b>National tourism perception</b>                               |          |
|                                                      |          | 12.03 Recommendation to extend business trips .....              | 58       |
|                                                      |          | <b>Natural and cultural resources</b>                            |          |
|                                                      |          | 13.02 Carbon dioxide damage .....                                | 105      |
|                                                      |          | 13.04 Business concern for ecosystems .....                      | 91       |
|                                                      |          | 13.01 Number of World Heritage sites .....                       | 87       |
|                                                      |          | 13.03 Nationally protected areas .....                           | 59       |

# Madagascar

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 18.6  |
| Surface area (1,000 square kilometers) .....              | 587.0 |
| Gross domestic product (US\$ billions), 2005 .....        | 5.0   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 908   |
| Real GDP growth (percent), 2005 .....                     | 4.6   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

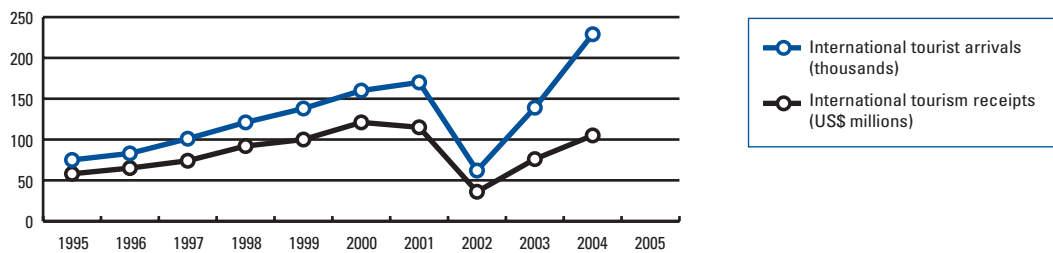
|                               |     | Percent<br>of total | 2007–2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-----|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 129 | 2.4                 | 3.6                                         |
| Employment (1,000 jobs) ..... | 73  | 1.8                 | 2.3                                         |

### T&T economy, 2006 estimates

|                               |     |     |     |
|-------------------------------|-----|-----|-----|
| GDP (US\$ millions) .....     | 382 | 7.0 | 3.4 |
| Employment (1,000 jobs) ..... | 222 | 5.6 | 2.2 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2004 .....         | 229 |
| International tourism receipts (US\$ millions), 2004 ..... | 105 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1–7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index .....</b>                                      | <b>112</b>           | <b>3.4</b>           |
| <b>T&amp;T regulatory framework .....</b>                    | <b>104</b>           | <b>3.5</b>           |
| Policy rules and regulations .....                           | 117                  | 3.2                  |
| Environmental regulation .....                               | 62                   | 4.0                  |
| Safety and security .....                                    | 93                   | 3.8                  |
| Health and hygiene .....                                     | 118                  | 2.7                  |
| Prioritization of T&T strategies .....                       | 50                   | 4.0                  |
| <b>T&amp;T business environment and infrastructure .....</b> | <b>105</b>           | <b>2.7</b>           |
| Air transport infrastructure .....                           | 110                  | 2.0                  |
| Ground transport infrastructure .....                        | 106                  | 2.4                  |
| Tourism infrastructure .....                                 | 81                   | 2.5                  |
| ICT infrastructure .....                                     | 115                  | 1.7                  |
| Price competitiveness in T&T industry .....                  | 43                   | 4.8                  |
| <b>T&amp;T human, cultural, and natural resources .....</b>  | <b>110</b>           | <b>4.1</b>           |
| Human resources .....                                        | 108                  | 3.9                  |
| Education and training .....                                 | 98                   | 4.0                  |
| Availability of qualified labor .....                        | 62                   | 4.4                  |
| Workforce wellness .....                                     | 108                  | 3.4                  |
| National tourism perception .....                            | 73                   | 4.7                  |
| Natural and cultural resources .....                         | 94                   | 3.7                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               |                                                    | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                           | Rank/124 |
|------------------------------------------------------|----------------------------------------------------|----------|------------------------------------------------------|-----------------------------------------------------------|----------|
| <b>Prioritization of Travel &amp; Tourism</b>        |                                                    |          | <b>Policy rules and regulations</b>                  |                                                           |          |
| 5.02                                                 | T&T government expenditure .....                   | 26       | 1.04                                                 | Visa requirements .....                                   | 113      |
| 5.01                                                 | Government prioritization of the T&T industry..... | 29       | 1.03                                                 | Rules governing foreign direct investment .....           | 103      |
| 5.03                                                 | Effectiveness of marketing and branding .....      | 34       | 1.02                                                 | Property rights.....                                      | 100      |
| <b>Price competitiveness in the T&amp;T industry</b> |                                                    |          | 1.05                                                 | Openness of bilateral Air Service Agreements .....        | 90       |
| 10.02                                                | Purchasing power parity .....                      | 26       | 1.01                                                 | Foreign ownership restrictions.....                       | 73       |
| 10.01                                                | Ticket taxes and airport charges.....              | 45       | <b>Environmental regulation</b>                      |                                                           |          |
| <b>Human resources</b>                               |                                                    |          | 2.02                                                 | Clarity and stability of environmental regulations .....  | 68       |
| 11.01                                                | Primary education enrollment .....                 | 1        | 2.01                                                 | Stringency of environmental regulation .....              | 60       |
| 11.06                                                | Hiring and firing practices.....                   | 46       | 2.03                                                 | Government prioritization of sustainable T&T.....         | 56       |
| <b>National tourism perception</b>                   |                                                    |          | <b>Safety and security</b>                           |                                                           |          |
| 12.01                                                | Tourism openness .....                             | 45       | 3.03                                                 | Business costs of crime and violence.....                 | 107      |
| <b>Natural and cultural resources</b>                |                                                    |          | 3.02                                                 | Reliability of police services .....                      | 83       |
| 13.02                                                | Carbon dioxide damage.....                         | 50       | 3.01                                                 | Business costs of terrorism .....                         | 67       |
|                                                      |                                                    |          | <b>Health and hygiene</b>                            |                                                           |          |
|                                                      |                                                    |          | 4.04                                                 | Access to improved drinking water .....                   | 110      |
|                                                      |                                                    |          | 4.03                                                 | Access to improved sanitation .....                       | 102      |
|                                                      |                                                    |          | 4.02                                                 | Physician density.....                                    | 100      |
|                                                      |                                                    |          | 4.01                                                 | Gov't efforts to reduce health risks from pandemics ..... | 86       |
|                                                      |                                                    |          | <b>Prioritization of Travel &amp; Tourism</b>        |                                                           |          |
|                                                      |                                                    |          | 5.04                                                 | T&T fair attendance .....                                 | 105      |
|                                                      |                                                    |          | <b>Air transport infrastructure</b>                  |                                                           |          |
|                                                      |                                                    |          | 6.05                                                 | Number of operating airlines.....                         | 111      |
|                                                      |                                                    |          | 6.06                                                 | International air transport network .....                 | 109      |
|                                                      |                                                    |          | 6.01                                                 | Quality of air transport infrastructure .....             | 100      |
|                                                      |                                                    |          | 6.02                                                 | Available seat kilometers.....                            | 87       |
|                                                      |                                                    |          | 6.03                                                 | Departures per 1,000 population.....                      | 70       |
|                                                      |                                                    |          | 6.04                                                 | Airport density .....                                     | 64       |
|                                                      |                                                    |          | <b>Ground transport infrastructure</b>               |                                                           |          |
|                                                      |                                                    |          | 7.04                                                 | Domestic transport network .....                          | 108      |
|                                                      |                                                    |          | 7.02                                                 | Railroad infrastructure .....                             | 102      |
|                                                      |                                                    |          | 7.03                                                 | Port infrastructure .....                                 | 101      |
|                                                      |                                                    |          | 7.01                                                 | Road infrastructure.....                                  | 95       |
|                                                      |                                                    |          | <b>Tourism infrastructure</b>                        |                                                           |          |
|                                                      |                                                    |          | 8.03                                                 | ATMs accepting Visa cards .....                           | 112      |
|                                                      |                                                    |          | 8.01                                                 | Hotel rooms.....                                          | 102      |
|                                                      |                                                    |          | 8.02                                                 | Presence of major car rental companies.....               | 55       |
|                                                      |                                                    |          | <b>ICT infrastructure</b>                            |                                                           |          |
|                                                      |                                                    |          | 9.03                                                 | Telephone lines.....                                      | 120      |
|                                                      |                                                    |          | 9.02                                                 | Internet users .....                                      | 112      |
|                                                      |                                                    |          | 9.01                                                 | Extent of business Internet use .....                     | 101      |
|                                                      |                                                    |          | <b>Price competitiveness in the T&amp;T industry</b> |                                                           |          |
|                                                      |                                                    |          | 10.04                                                | Fuel price level .....                                    | 71       |
|                                                      |                                                    |          | 10.03                                                | Extent and effect of taxation.....                        | 69       |
|                                                      |                                                    |          | <b>Human resources</b>                               |                                                           |          |
|                                                      |                                                    |          | 11.09                                                | Malaria incidence.....                                    | 116      |
|                                                      |                                                    |          | 11.10                                                | Tuberculosis incidence .....                              | 103      |
|                                                      |                                                    |          | 11.11                                                | Life expectancy .....                                     | 102      |
|                                                      |                                                    |          | 11.05                                                | Extent of staff training.....                             | 101      |
|                                                      |                                                    |          | 11.04                                                | Local availability of research and training services..... | 99       |
|                                                      |                                                    |          | 11.08                                                | HIV prevalence .....                                      | 98       |
|                                                      |                                                    |          | 11.03                                                | Quality of the educational system .....                   | 90       |
|                                                      |                                                    |          | 11.07                                                | Ease of hiring foreign labor .....                        | 79       |

(Disadvantages cont'd. from bottom of right column)

<<< (Cont'd. on bottom of left column)

# Malawi

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 12.9  |
| Surface area (1,000 square kilometers) .....              | 118.5 |
| Gross domestic product (US\$ billions), 2005 .....        | 2.1   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 596   |
| Real GDP growth (percent), 2005 .....                     | 2.1   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

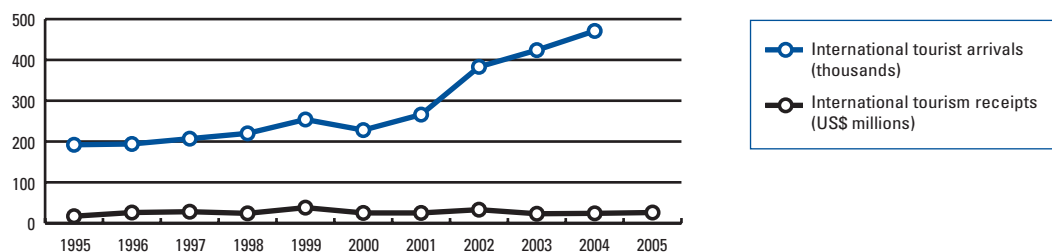
|                               |    | Percent<br>of total | 2007–2016<br>annual growth<br>(%, forecast) |
|-------------------------------|----|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 68 | 3.0                 | 3.1                                         |
| Employment (1,000 jobs) ..... | 62 | 2.3                 | 0.7                                         |

### T&T economy, 2006 estimates

|                               |     |     |     |
|-------------------------------|-----|-----|-----|
| GDP (US\$ millions) .....     | 136 | 6.0 | 3.8 |
| Employment (1,000 jobs) ..... | 126 | 4.7 | 1.4 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2004 .....         | 471 |
| International tourism receipts (US\$ millions), 2005 ..... | 26  |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1–7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index .....</b>                                      | <b>114</b>           | <b>3.3</b>           |
| <b>T&amp;T regulatory framework .....</b>                    | <b>103</b>           | <b>3.6</b>           |
| Policy rules and regulations .....                           | 73                   | 4.4                  |
| Environmental regulation .....                               | 86                   | 3.6                  |
| Safety and security .....                                    | 81                   | 4.1                  |
| Health and hygiene .....                                     | 104                  | 3.3                  |
| Prioritization of T&T strategies .....                       | 114                  | 2.5                  |
| <b>T&amp;T business environment and infrastructure .....</b> | <b>118</b>           | <b>2.5</b>           |
| Air transport infrastructure .....                           | 118                  | 1.9                  |
| Ground transport infrastructure .....                        | 111                  | 2.3                  |
| Tourism infrastructure .....                                 | 112                  | 1.7                  |
| ICT infrastructure .....                                     | 116                  | 1.7                  |
| Price competitiveness in T&T industry .....                  | 54                   | 4.7                  |
| <b>T&amp;T human, cultural, and natural resources .....</b>  | <b>117</b>           | <b>3.9</b>           |
| Human resources .....                                        | 121                  | 2.8                  |
| Education and training .....                                 | 110                  | 3.7                  |
| Availability of qualified labor .....                        | 103                  | 3.7                  |
| Workforce wellness .....                                     | 122                  | 1.2                  |
| National tourism perception .....                            | 40                   | 5.3                  |
| Natural and cultural resources .....                         | 99                   | 3.6                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               |                                    | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                           | Rank/124 |
|------------------------------------------------------|------------------------------------|----------|------------------------------------------------------|-----------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                  |                                    |          | <b>Policy rules and regulations</b>                  |                                                           |          |
| 1.04                                                 | Visa requirements .....            | 43       | 1.05                                                 | Openness of bilateral Air Service Agreements .....        | 89       |
| <b>Price competitiveness in the T&amp;T industry</b> |                                    |          | 1.03                                                 | Rules governing foreign direct investment .....           | 86       |
| 10.02                                                | Purchasing power parity .....      | 21       | 1.02                                                 | Property rights .....                                     | 74       |
| <b>Human resources</b>                               |                                    |          | 1.01                                                 | Foreign ownership restrictions .....                      | 59       |
| 11.01                                                | Primary education enrollment ..... | 1        | <b>Environmental regulation</b>                      |                                                           |          |
| <b>National tourism perception</b>                   |                                    |          | 2.01                                                 | Stringency of environmental regulation .....              | 88       |
| 12.01                                                | Tourism openness .....             | 22       | 2.03                                                 | Government prioritization of sustainable T&T .....        | 83       |
| <b>Natural and cultural resources</b>                |                                    |          | 2.02                                                 | Clarity and stability of environmental regulations .....  | 80       |
| 13.02                                                | Carbon dioxide damage .....        | 41       | <b>Safety and security</b>                           |                                                           |          |
| 13.03                                                | Nationally protected areas .....   | 42       | 3.03                                                 | Business costs of crime and violence .....                | 87       |
|                                                      |                                    |          | 3.02                                                 | Reliability of police services .....                      | 81       |
|                                                      |                                    |          | 3.01                                                 | Business costs of terrorism .....                         | 56       |
|                                                      |                                    |          | <b>Health and hygiene</b>                            |                                                           |          |
|                                                      |                                    |          | 4.02                                                 | Physician density .....                                   | 122      |
|                                                      |                                    |          | 4.04                                                 | Access to improved drinking water .....                   | 97       |
|                                                      |                                    |          | 4.03                                                 | Access to improved sanitation .....                       | 89       |
|                                                      |                                    |          | 4.01                                                 | Gov't efforts to reduce health risks from pandemics ..... | 73       |
|                                                      |                                    |          | <b>Prioritization of Travel &amp; Tourism</b>        |                                                           |          |
|                                                      |                                    |          | 5.04                                                 | T&T fair attendance .....                                 | 117      |
|                                                      |                                    |          | 5.02                                                 | T&T government expenditure .....                          | 101      |
|                                                      |                                    |          | 5.03                                                 | Effectiveness of marketing and branding .....             | 101      |
|                                                      |                                    |          | 5.01                                                 | Government prioritization of the T&T industry .....       | 83       |
|                                                      |                                    |          | <b>Air transport infrastructure</b>                  |                                                           |          |
|                                                      |                                    |          | 6.02                                                 | Available seat kilometers .....                           | 119      |
|                                                      |                                    |          | 6.01                                                 | Quality of air transport infrastructure .....             | 113      |
|                                                      |                                    |          | 6.05                                                 | Number of operating airlines .....                        | 111      |
|                                                      |                                    |          | 6.06                                                 | International air transport network .....                 | 108      |
|                                                      |                                    |          | 6.03                                                 | Departures per 1,000 population .....                     | 98       |
|                                                      |                                    |          | 6.04                                                 | Airport density .....                                     | 87       |
|                                                      |                                    |          | <b>Ground transport infrastructure</b>               |                                                           |          |
|                                                      |                                    |          | 7.03                                                 | Port infrastructure .....                                 | 113      |
|                                                      |                                    |          | 7.04                                                 | Domestic transport network .....                          | 113      |
|                                                      |                                    |          | 7.01                                                 | Road infrastructure .....                                 | 84       |
|                                                      |                                    |          | 7.02                                                 | Railroad infrastructure .....                             | 83       |
|                                                      |                                    |          | <b>Tourism infrastructure</b>                        |                                                           |          |
|                                                      |                                    |          | 8.03                                                 | ATMs accepting Visa cards .....                           | 106      |
|                                                      |                                    |          | 8.02                                                 | Presence of major car rental companies .....              | 102      |
|                                                      |                                    |          | 8.01                                                 | Hotel rooms .....                                         | 73       |
|                                                      |                                    |          | <b>ICT infrastructure</b>                            |                                                           |          |
|                                                      |                                    |          | 9.02                                                 | Internet users .....                                      | 118      |
|                                                      |                                    |          | 9.03                                                 | Telephone lines .....                                     | 111      |
|                                                      |                                    |          | 9.01                                                 | Extent of business Internet use .....                     | 104      |
|                                                      |                                    |          | <b>Price competitiveness in the T&amp;T industry</b> |                                                           |          |
|                                                      |                                    |          | 10.03                                                | Extent and effect of taxation .....                       | 86       |
|                                                      |                                    |          | 10.04                                                | Fuel price level .....                                    | 78       |
|                                                      |                                    |          | 10.01                                                | Ticket taxes and airport charges .....                    | 52       |

(Disadvantages cont'd. from bottom of right column)

<<< (Cont'd. on bottom of left column)

# Malaysia

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 25.3   |
| Surface area (1,000 square kilometers) .....              | 329.7  |
| Gross domestic product (US\$ billions), 2005 .....        | 130.8  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 11,201 |
| Real GDP growth (percent), 2005 .....                     | 5.2    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

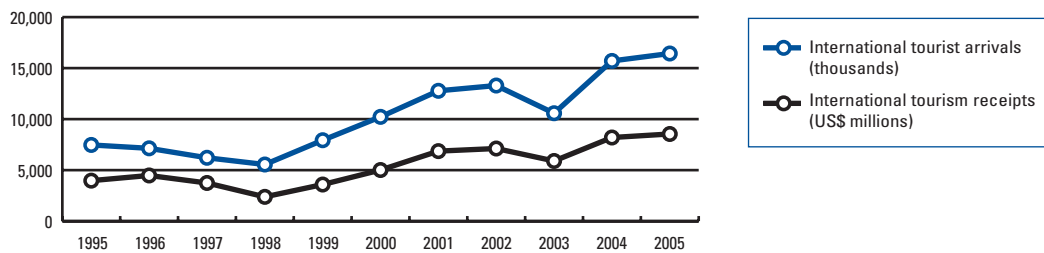
|                               |       | Percent<br>of total | 2007–2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 6,739 | 4.6                 | 5.6                                         |
| Employment (1,000 jobs) ..... | 492   | 4.6                 | 3.0                                         |

### T&T economy, 2006 estimates

|                               |        |      |     |
|-------------------------------|--------|------|-----|
| GDP (US\$ millions) .....     | 21,403 | 14.6 | 5.9 |
| Employment (1,000 jobs) ..... | 1,345  | 12.6 | 3.1 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |        |
|------------------------------------------------------------|--------|
| International tourist arrivals (1,000), 2005 .....         | 16,431 |
| International tourism receipts (US\$ millions), 2005 ..... | 8,543  |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1–7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index .....</b>                                      | <b>31</b>            | <b>4.8</b>           |
| <b>T&amp;T regulatory framework .....</b>                    | <b>27</b>            | <b>5.1</b>           |
| Policy rules and regulations .....                           | 26                   | 5.3                  |
| Environmental regulation .....                               | 20                   | 5.3                  |
| Safety and security .....                                    | 26                   | 5.3                  |
| Health and hygiene .....                                     | 62                   | 4.7                  |
| Prioritization of T&T strategies .....                       | 21                   | 5.0                  |
| <b>T&amp;T business environment and infrastructure .....</b> | <b>27</b>            | <b>4.4</b>           |
| Air transport infrastructure .....                           | 31                   | 3.9                  |
| Ground transport infrastructure .....                        | 15                   | 5.6                  |
| Tourism infrastructure .....                                 | 60                   | 3.1                  |
| ICT infrastructure .....                                     | 37                   | 3.7                  |
| Price competitiveness in T&T industry .....                  | 2                    | 5.9                  |
| <b>T&amp;T human, cultural, and natural resources .....</b>  | <b>57</b>            | <b>4.8</b>           |
| Human resources .....                                        | 34                   | 5.4                  |
| Education and training .....                                 | 29                   | 5.3                  |
| Availability of qualified labor .....                        | 45                   | 4.6                  |
| Workforce wellness .....                                     | 73                   | 6.2                  |
| National tourism perception .....                            | 26                   | 5.6                  |
| Natural and cultural resources .....                         | 101                  | 3.5                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."



## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                          | Rank/124 | COMPETITIVE DISADVANTAGES                               | Rank/124 |
|-----------------------------------------------------------------|----------|---------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                             |          | <b>Policy rules and regulations</b>                     |          |
| 1.03 Rules governing foreign direct investment .....            | 12       | 1.05 Openness of bilateral Air Service Agreements ..... | 51       |
| 1.04 Visa requirements .....                                    | 15       | 1.01 Foreign ownership restrictions.....                | 49       |
| 1.02 Property rights.....                                       | 24       |                                                         |          |
| <b>Environmental regulation</b>                                 |          | <b>Safety and security</b>                              |          |
| 2.03 Government prioritization of sustainable T&T .....         | 8        | 3.01 Business costs of terrorism .....                  | 65       |
| 2.02 Clarity and stability of environmental regulations .....   | 23       | 3.03 Business costs of crime and violence.....          | 32       |
| 2.01 Stringency of environmental regulation .....               | 25       |                                                         |          |
| <b>Safety and security</b>                                      |          | <b>Health and hygiene</b>                               |          |
| 3.02 Reliability of police services .....                       | 19       | 4.02 Physician density .....                            | 86       |
|                                                                 |          | 4.04 Access to improved drinking water .....            | 45       |
| <b>Health and hygiene</b>                                       |          |                                                         |          |
| 4.01 Gov't efforts to reduce health risks from pandemics .....  | 8        | <b>Prioritization of Travel &amp; Tourism</b>           |          |
|                                                                 |          | 5.02 T&T government expenditure .....                   | 94       |
| <b>Prioritization of Travel &amp; Tourism</b>                   |          |                                                         |          |
| 5.04 T&T fair attendance .....                                  | 2        | <b>Air transport infrastructure</b>                     |          |
| 5.03 Effectiveness of marketing and branding .....              | 6        | 6.04 Airport density .....                              | 75       |
| 5.01 Government prioritization of the T&T industry .....        | 8        | 6.03 Departures per 1,000 population.....               | 34       |
|                                                                 |          |                                                         |          |
| <b>Air transport infrastructure</b>                             |          | <b>Tourism infrastructure</b>                           |          |
| 6.01 Quality of air transport infrastructure .....              | 16       | 8.02 Presence of major car rental companies.....        | 66       |
| 6.02 Available seat kilometers.....                             | 21       | 8.03 ATMs accepting Visa cards .....                    | 48       |
| 6.06 International air transport network .....                  | 24       | 8.01 Hotel rooms.....                                   | 42       |
| 6.05 Number of operating airlines.....                          | 27       |                                                         |          |
|                                                                 |          | <b>ICT infrastructure</b>                               |          |
| <b>Ground transport infrastructure</b>                          |          | 9.03 Telephone lines.....                               | 63       |
| 7.03 Port infrastructure .....                                  | 13       | 9.02 Internet users .....                               | 32       |
| 7.01 Road infrastructure .....                                  | 15       |                                                         |          |
| 7.02 Railroad infrastructure .....                              | 17       | <b>Price competitiveness in the T&amp;T industry</b>    |          |
| 7.04 Domestic transport network .....                           | 23       | 10.02 Purchasing power parity.....                      | 56       |
|                                                                 |          |                                                         |          |
| <b>ICT infrastructure</b>                                       |          | <b>Human resources</b>                                  |          |
| 9.01 Extent of business Internet use .....                      | 27       | 11.01 Primary education enrollment .....                | 112      |
|                                                                 |          | 11.02 Secondary education enrollment.....               | 86       |
| <b>Price competitiveness in the T&amp;T industry</b>            |          | 11.10 Tuberculosis incidence .....                      | 78       |
| 10.01 Ticket taxes and airport charges.....                     | 8        | 11.09 Malaria incidence.....                            | 77       |
| 10.04 Fuel price level .....                                    | 9        | 11.08 HIV prevalence .....                              | 69       |
| 10.03 Extent and effect of taxation.....                        | 12       | 11.06 Hiring and firing practices.....                  | 59       |
|                                                                 |          | 11.11 Life expectancy .....                             | 53       |
| <b>Human resources</b>                                          |          | 11.07 Ease of hiring foreign labor .....                | 38       |
| 11.03 Quality of the educational system .....                   | 10       |                                                         |          |
| 11.05 Extent of staff training.....                             | 17       | <b>National tourism perception</b>                      |          |
| 11.04 Local availability of research and training services..... | 22       | 12.02 Attitude toward tourists .....                    | 36       |
|                                                                 |          |                                                         |          |
| <b>National tourism perception</b>                              |          | <b>Natural and cultural resources</b>                   |          |
| 12.03 Recommendation to extend business trips .....             | 16       | 13.05 Risk of malaria and yellow fever .....            | 103      |
| 12.01 Tourism openness .....                                    | 20       | 13.02 Carbon dioxide damage.....                        | 93       |
|                                                                 |          | 13.01 Number of World Heritage sites .....              | 73       |
| <b>Natural and cultural resources</b>                           |          | 13.03 Nationally protected areas.....                   | 73       |
| 13.04 Business concern for ecosystems .....                     | 22       |                                                         |          |

# Mali

## Key indicators

|                                                           |         |
|-----------------------------------------------------------|---------|
| Population (millions), 2005 .....                         | 13.5    |
| Surface area (1,000 square kilometers) .....              | 1,240.2 |
| Gross domestic product (US\$ billions), 2005 .....        | 5.4     |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 1,154   |
| Real GDP growth (percent), 2005 .....                     | 6.1     |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

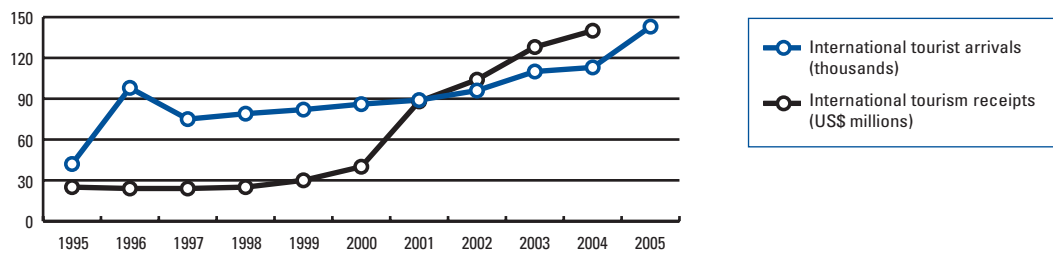
|                               |     | Percent of total | 2007–2016 annual growth (% forecast) |
|-------------------------------|-----|------------------|--------------------------------------|
| GDP (US\$ millions) .....     | 152 | 2.6              | 4.1                                  |
| Employment (1,000 jobs) ..... | 67  | 2.0              | 2.7                                  |

### T&T economy, 2006 estimates

|                               |     |     |     |
|-------------------------------|-----|-----|-----|
| GDP (US\$ millions) .....     | 343 | 5.8 | 4.0 |
| Employment (1,000 jobs) ..... | 154 | 4.7 | 2.7 |

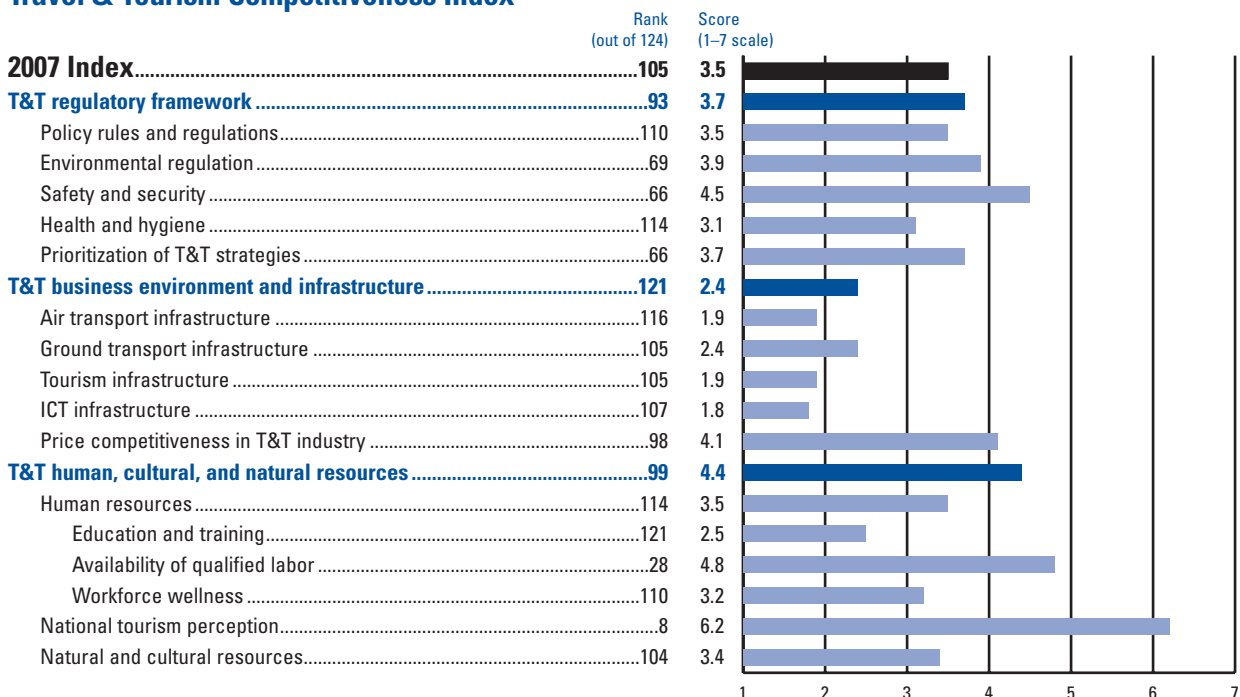
Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2005 .....         | 143 |
| International tourism receipts (US\$ millions), 2004 ..... | 140 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index



Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               |                                                           | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                            | Rank/124 |
|------------------------------------------------------|-----------------------------------------------------------|----------|------------------------------------------------------|------------------------------------------------------------|----------|
| <b>Environmental regulation</b>                      |                                                           |          | <b>Policy rules and regulations</b>                  |                                                            |          |
| 2.03                                                 | Government prioritization of sustainable T&T .....        | 39       | 1.04                                                 | Visa requirements .....                                    | 113      |
| <b>Safety and security</b>                           |                                                           |          | 1.05                                                 | Openness of bilateral Air Service Agreements .....         | 98       |
| 3.01                                                 | Business costs of terrorism .....                         | 48       | 1.02                                                 | Property rights .....                                      | 77       |
| <b>Health and hygiene</b>                            |                                                           |          | 1.01                                                 | Foreign ownership restrictions .....                       | 70       |
| 4.01                                                 | Gov't efforts to reduce health risks from pandemics ..... | 38       | 1.03                                                 | Rules governing foreign direct investment .....            | 64       |
| <b>Prioritization of Travel &amp; Tourism</b>        |                                                           |          | <b>Environmental regulation</b>                      |                                                            |          |
| 5.03                                                 | Effectiveness of marketing and branding .....             | 20       | 2.02                                                 | Clarity and stability of environmental regulations .....   | 89       |
| 5.01                                                 | Government prioritization of the T&T industry .....       | 42       | 2.01                                                 | Stringency of environmental regulation .....               | 83       |
| <b>Price competitiveness in the T&amp;T industry</b> |                                                           |          | <b>Safety and security</b>                           |                                                            |          |
| 10.02                                                | Purchasing power parity .....                             | 38       | 3.03                                                 | Business costs of crime and violence .....                 | 79       |
| <b>Human resources</b>                               |                                                           |          | 3.02                                                 | Reliability of police services .....                       | 57       |
| 11.07                                                | Ease of hiring foreign labor .....                        | 39       | <b>Health and hygiene</b>                            |                                                            |          |
| 11.06                                                | Hiring and firing practices .....                         | 40       | 4.02                                                 | Physician density .....                                    | 112      |
| <b>National tourism perception</b>                   |                                                           |          | 4.04                                                 | Access to improved drinking water .....                    | 109      |
| 12.02                                                | Attitude toward tourists .....                            | 24       | 4.03                                                 | Access to improved sanitation .....                        | 91       |
| 12.03                                                | Recommendation to extend business trips .....             | 43       | <b>Prioritization of Travel &amp; Tourism</b>        |                                                            |          |
| <b>Natural and cultural resources</b>                |                                                           |          | 5.02                                                 | T&T government expenditure .....                           | 94       |
| 13.02                                                | Carbon dioxide damage .....                               | 3        | 5.04                                                 | T&T fair attendance .....                                  | 70       |
|                                                      |                                                           |          | <b>Air transport infrastructure</b>                  |                                                            |          |
|                                                      |                                                           |          | 6.01                                                 | Quality of air transport infrastructure .....              | 114      |
|                                                      |                                                           |          | 6.03                                                 | Departures per 1,000 population .....                      | 112      |
|                                                      |                                                           |          | 6.06                                                 | International air transport network .....                  | 105      |
|                                                      |                                                           |          | 6.02                                                 | Available seat kilometers .....                            | 98       |
|                                                      |                                                           |          | 6.04                                                 | Airport density .....                                      | 98       |
|                                                      |                                                           |          | 6.05                                                 | Number of operating airlines .....                         | 75       |
|                                                      |                                                           |          | <b>Ground transport infrastructure</b>               |                                                            |          |
|                                                      |                                                           |          | 7.03                                                 | Port infrastructure .....                                  | 121      |
|                                                      |                                                           |          | 7.01                                                 | Road infrastructure .....                                  | 89       |
|                                                      |                                                           |          | 7.02                                                 | Railroad infrastructure .....                              | 89       |
|                                                      |                                                           |          | 7.04                                                 | Domestic transport network .....                           | 79       |
|                                                      |                                                           |          | <b>Tourism infrastructure</b>                        |                                                            |          |
|                                                      |                                                           |          | 8.03                                                 | ATMs accepting Visa cards .....                            | 113      |
|                                                      |                                                           |          | 8.01                                                 | Hotel rooms .....                                          | 107      |
|                                                      |                                                           |          | 8.02                                                 | Presence of major car rental companies .....               | 92       |
|                                                      |                                                           |          | <b>ICT infrastructure</b>                            |                                                            |          |
|                                                      |                                                           |          | 9.02                                                 | Internet users .....                                       | 115      |
|                                                      |                                                           |          | 9.03                                                 | Telephone lines .....                                      | 112      |
|                                                      |                                                           |          | 9.01                                                 | Extent of business Internet use .....                      | 84       |
|                                                      |                                                           |          | <b>Price competitiveness in the T&amp;T industry</b> |                                                            |          |
|                                                      |                                                           |          | 10.01                                                | Ticket taxes and airport charges .....                     | 116      |
|                                                      |                                                           |          | 10.03                                                | Extent and effect of taxation .....                        | 84       |
|                                                      |                                                           |          | 10.04                                                | Fuel price level .....                                     | 82       |
|                                                      |                                                           |          | <b>Human resources</b>                               |                                                            |          |
|                                                      |                                                           |          | 11.01                                                | Primary education enrollment .....                         | 121      |
|                                                      |                                                           |          | 11.05                                                | Extent of staff training .....                             | 117      |
|                                                      |                                                           |          | 11.10                                                | Tuberculosis incidence .....                               | 116      |
|                                                      |                                                           |          | 11.02                                                | Secondary education enrollment .....                       | 114      |
|                                                      |                                                           |          | 11.11                                                | Life expectancy .....                                      | 114      |
|                                                      |                                                           |          | 11.09                                                | Malaria incidence .....                                    | 112      |
|                                                      |                                                           |          | 11.03                                                | Quality of the educational system .....                    | 109      |
|                                                      |                                                           |          | 11.08                                                | HIV prevalence .....                                       | 102      |
|                                                      |                                                           |          | 11.04                                                | Local availability of research and training services ..... | 93       |

(Disadvantages cont'd. from bottom of right column)

&lt;&lt;&lt; (Cont'd. on bottom of left column)

# Malta

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 0.4    |
| Surface area (1,000 square kilometers) .....              | 0.3    |
| Gross domestic product (US\$ billions), 2005 .....        | 5.5    |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 19,739 |
| Real GDP growth (percent), 2005 .....                     | 2.5    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

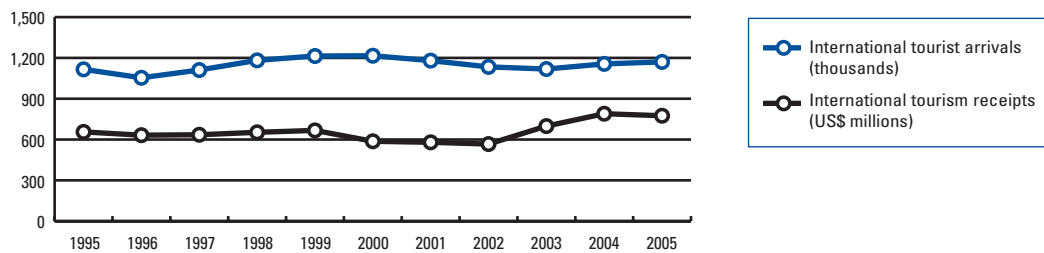
|                               |     | Percent of total | 2007–2016 annual growth (% forecast) |
|-------------------------------|-----|------------------|--------------------------------------|
| GDP (US\$ millions) .....     | 743 | 13.2             | 4.6                                  |
| Employment (1,000 jobs) ..... | 28  | 18.4             | 1.7                                  |

### T&T economy, 2006 estimates

|                               |       |      |     |
|-------------------------------|-------|------|-----|
| GDP (US\$ millions) .....     | 1,474 | 26.1 | 4.4 |
| Employment (1,000 jobs) ..... | 48    | 31.9 | 1.6 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 1,171 |
| International tourism receipts (US\$ millions), 2005 ..... | 775   |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank (out of 124) | Score (1–7 scale) |
|--------------------------------------------------------------|-------------------|-------------------|
| <b>2007 Index .....</b>                                      | <b>26</b>         | <b>5.0</b>        |
| <b>T&amp;T regulatory framework .....</b>                    | <b>23</b>         | <b>5.2</b>        |
| Policy rules and regulations .....                           | 53                | 4.8               |
| Environmental regulation .....                               | 55                | 4.2               |
| Safety and security .....                                    | 16                | 5.6               |
| Health and hygiene .....                                     | 26                | 5.8               |
| Prioritization of T&T strategies .....                       | 5                 | 5.4               |
| <b>T&amp;T business environment and infrastructure .....</b> | <b>31</b>         | <b>4.4</b>        |
| Air transport infrastructure .....                           | 42                | 3.6               |
| Ground transport infrastructure .....                        | 60                | 3.6               |
| Tourism infrastructure .....                                 | 12                | 5.6               |
| ICT infrastructure .....                                     | 11                | 5.4               |
| Price competitiveness in T&T industry .....                  | 109               | 3.7               |
| <b>T&amp;T human, cultural, and natural resources .....</b>  | <b>21</b>         | <b>5.3</b>        |
| Human resources .....                                        | 43                | 5.3               |
| Education and training .....                                 | 33                | 5.2               |
| Availability of qualified labor .....                        | 90                | 3.9               |
| Workforce wellness .....                                     | 14                | 6.9               |
| National tourism perception .....                            | 16                | 6.0               |
| Natural and cultural resources .....                         | 44                | 4.7               |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                  | Rank/124 | COMPETITIVE DISADVANTAGES                                       | Rank/124 |
|---------------------------------------------------------|----------|-----------------------------------------------------------------|----------|
| <b>Safety and security</b>                              |          | <b>Policy rules and regulations</b>                             |          |
| 3.03 Business costs of crime and violence.....          | 14       | 1.04 Visa requirements .....                                    | 85       |
| <b>Health and hygiene</b>                               |          | 1.05 Openness of bilateral Air Service Agreements .....         | 70       |
| 4.04 Access to improved drinking water .....            | 1        | 1.02 Property rights.....                                       | 41       |
| 4.02 Physician density.....                             | 24       | 1.01 Foreign ownership restrictions.....                        | 35       |
| <b>Prioritization of Travel &amp; Tourism</b>           |          | 1.03 Rules governing foreign direct investment .....            | 33       |
| 5.02 T&T government expenditure .....                   | 6        | <b>Environmental regulation</b>                                 |          |
| 5.01 Government prioritization of the T&T industry..... | 21       | 2.01 Stringency of environmental regulation .....               | 54       |
| 5.04 T&T fair attendance .....                          | 23       | 2.02 Clarity and stability of environmental regulations .....   | 53       |
| <b>Air transport infrastructure</b>                     |          | 2.03 Government prioritization of sustainable T&T .....         | 50       |
| 6.03 Departures per 1,000 population.....               | 7        | <b>Safety and security</b>                                      |          |
| <b>Tourism infrastructure</b>                           |          | 3.01 Business costs of terrorism .....                          | 32       |
| 8.02 Presence of major car rental companies.....        | 1        | 3.02 Reliability of police services .....                       | 30       |
| 8.01 Hotel rooms.....                                   | 2        | <b>Health and hygiene</b>                                       |          |
| <b>ICT infrastructure</b>                               |          | 4.01 Gov't efforts to reduce health risks from pandemics .....  | 26       |
| 9.02 Internet users .....                               | 3        | <b>Prioritization of Travel &amp; Tourism</b>                   |          |
| 9.03 Telephone lines.....                               | 17       | 5.03 Effectiveness of marketing and branding .....              | 55       |
| <b>Human resources</b>                                  |          | <b>Air transport infrastructure</b>                             |          |
| 11.01 Primary education enrollment .....                | 1        | 6.04 Airport density .....                                      | 98       |
| 11.02 Secondary education enrollment.....               | 1        | 6.05 Number of operating airlines.....                          | 97       |
| 11.09 Malaria incidence.....                            | 1        | 6.02 Available seat kilometers.....                             | 80       |
| 11.10 Tuberculosis incidence .....                      | 7        | 6.06 International air transport network .....                  | 52       |
| 11.11 Life expectancy .....                             | 15       | 6.01 Quality of air transport infrastructure .....              | 40       |
| <b>National tourism perception</b>                      |          | <b>Ground transport infrastructure</b>                          |          |
| 12.01 Tourism openness .....                            | 10       | 7.01 Road infrastructure.....                                   | 76       |
| 12.02 Attitude toward tourists .....                    | 10       | 7.02 Railroad infrastructure .....                              | 71       |
|                                                         |          | 7.04 Domestic transport network .....                           | 51       |
|                                                         |          | 7.03 Port infrastructure .....                                  | 35       |
|                                                         |          | <b>Tourism infrastructure</b>                                   |          |
|                                                         |          | 8.03 ATMs accepting Visa cards .....                            | 31       |
|                                                         |          | <b>ICT infrastructure</b>                                       |          |
|                                                         |          | 9.01 Extent of business Internet use .....                      | 34       |
|                                                         |          | <b>Price competitiveness in the T&amp;T industry</b>            |          |
|                                                         |          | 10.01 Ticket taxes and airport charges.....                     | 118      |
|                                                         |          | 10.04 Fuel price level .....                                    | 92       |
|                                                         |          | 10.02 Purchasing power parity.....                              | 85       |
|                                                         |          | 10.03 Extent and effect of taxation.....                        | 60       |
|                                                         |          | <b>Human resources</b>                                          |          |
|                                                         |          | 11.07 Ease of hiring foreign labor .....                        | 92       |
|                                                         |          | 11.04 Local availability of research and training services..... | 88       |
|                                                         |          | 11.06 Hiring and firing practices.....                          | 87       |
|                                                         |          | 11.08 HIV prevalence .....                                      | 48       |
|                                                         |          | 11.05 Extent of staff training.....                             | 44       |
|                                                         |          | 11.03 Quality of the educational system .....                   | 28       |
|                                                         |          | <b>National tourism perception</b>                              |          |
|                                                         |          | 12.03 Recommendation to extend business trips .....             | 49       |
|                                                         |          | <b>Natural and cultural resources</b>                           |          |
|                                                         |          | 13.01 Number of World Heritage sites .....                      | 60       |
|                                                         |          | 13.02 Carbon dioxide damage.....                                | 55       |
|                                                         |          | 13.04 Business concern for ecosystems .....                     | 55       |

# Mauritania

## Key indicators

|                                                           |         |
|-----------------------------------------------------------|---------|
| Population (millions), 2005 .....                         | 3.1     |
| Surface area (1,000 square kilometers) .....              | 1,025.5 |
| Gross domestic product (US\$ billions), 2005 .....        | 1.9     |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 2,535   |
| Real GDP growth (percent), 2005 .....                     | 5.4     |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

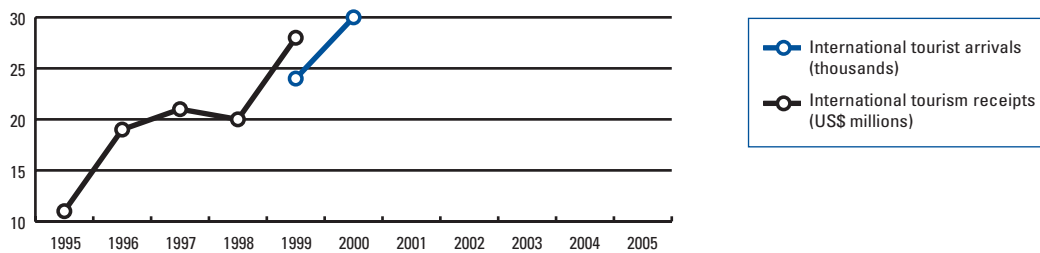
|                               |     | Percent<br>of total | 2007–2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-----|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | n/a | n/a                 | n/a                                         |
| Employment (1,000 jobs) ..... | n/a | n/a                 | n/a                                         |

### T&T economy, 2006 estimates

|                               |     |     |     |
|-------------------------------|-----|-----|-----|
| GDP (US\$ millions) .....     | n/a | n/a | n/a |
| Employment (1,000 jobs) ..... | n/a | n/a | n/a |

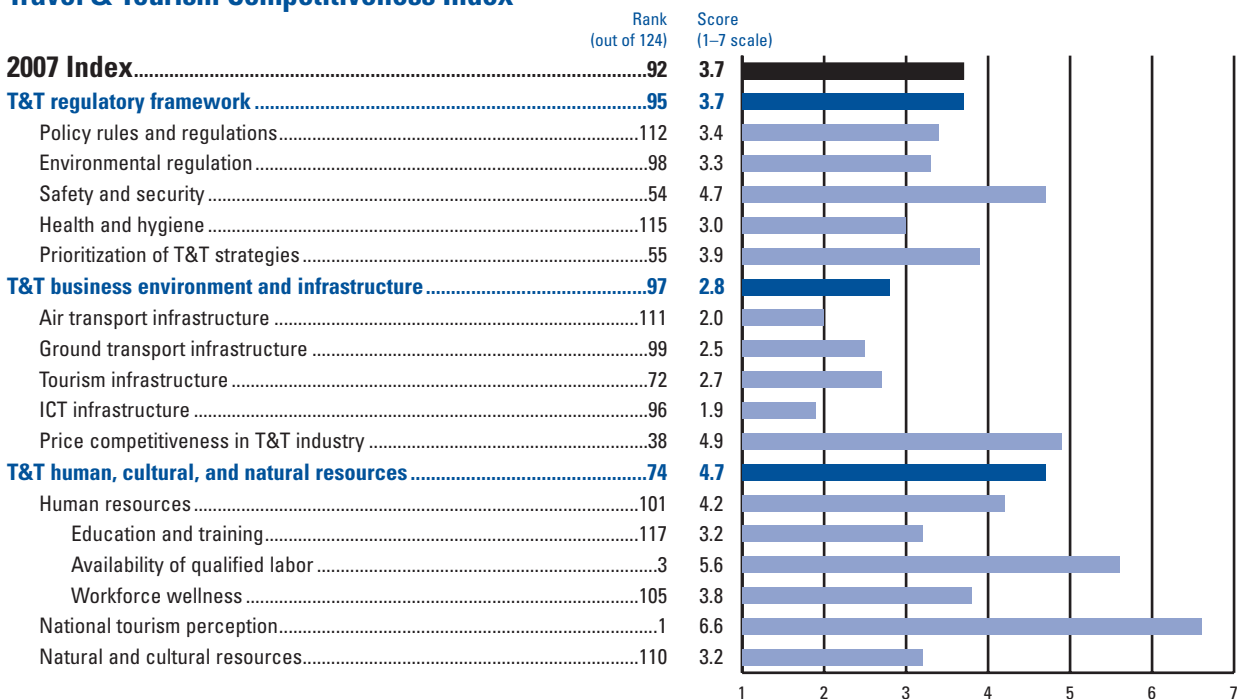
Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |    |
|------------------------------------------------------------|----|
| International tourist arrivals (1,000), 2000 .....         | 30 |
| International tourism receipts (US\$ millions), 1999 ..... | 28 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index



Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               |                                                    | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                           | Rank/124 |
|------------------------------------------------------|----------------------------------------------------|----------|------------------------------------------------------|-----------------------------------------------------------|----------|
| <b>Safety and security</b>                           |                                                    |          | <b>Policy rules and regulations</b>                  |                                                           |          |
| 3.01                                                 | Business costs of terrorism .....                  | 37       | 1.04                                                 | Visa requirements .....                                   | 113      |
| <b>Prioritization of Travel &amp; Tourism</b>        |                                                    |          | 1.01                                                 | Foreign ownership restrictions.....                       | 96       |
| 5.03                                                 | Effectiveness of marketing and branding .....      | 31       | 1.02                                                 | Property rights.....                                      | 93       |
| 5.01                                                 | Government prioritization of the T&T industry..... | 33       | 1.05                                                 | Openness of bilateral Air Service Agreements .....        | 81       |
| <b>Price competitiveness in the T&amp;T industry</b> |                                                    |          | 1.03                                                 | Rules governing foreign direct investment .....           | 53       |
| 10.03                                                | Extent and effect of taxation.....                 | 13       | <b>Environmental regulation</b>                      |                                                           |          |
| 10.04                                                | Fuel price level .....                             | 46       | 2.01                                                 | Stringency of environmental regulation .....              | 104      |
| <b>Human resources</b>                               |                                                    |          | 2.03                                                 | Government prioritization of sustainable T&T.....         | 94       |
| 11.06                                                | Hiring and firing practices.....                   | 3        | 2.02                                                 | Clarity and stability of environmental regulations .....  | 89       |
| 11.07                                                | Ease of hiring foreign labor .....                 | 22       | <b>Safety and security</b>                           |                                                           |          |
| <b>National tourism perception</b>                   |                                                    |          | 3.02                                                 | Reliability of police services .....                      | 61       |
| 12.03                                                | Recommendation to extend business trips .....      | 3        | 3.03                                                 | Business costs of crime and violence.....                 | 58       |
| 12.02                                                | Attitude toward tourists .....                     | 13       | <b>Health and hygiene</b>                            |                                                           |          |
|                                                      |                                                    |          | 4.02                                                 | Physician density .....                                   | 110      |
|                                                      |                                                    |          | 4.04                                                 | Access to improved drinking water .....                   | 104      |
|                                                      |                                                    |          | 4.03                                                 | Access to improved sanitation .....                       | 95       |
|                                                      |                                                    |          | 4.01                                                 | Gov't efforts to reduce health risks from pandemics ..... | 70       |
|                                                      |                                                    |          | <b>Prioritization of Travel &amp; Tourism</b>        |                                                           |          |
|                                                      |                                                    |          | 5.04                                                 | T&T fair attendance .....                                 | 105      |
|                                                      |                                                    |          | <b>Air transport infrastructure</b>                  |                                                           |          |
|                                                      |                                                    |          | 6.01                                                 | Quality of air transport infrastructure .....             | 118      |
|                                                      |                                                    |          | 6.05                                                 | Number of operating airlines.....                         | 117      |
|                                                      |                                                    |          | 6.02                                                 | Available seat kilometers.....                            | 113      |
|                                                      |                                                    |          | 6.06                                                 | International air transport network .....                 | 87       |
|                                                      |                                                    |          | 6.03                                                 | Departures per 1,000 population.....                      | 82       |
|                                                      |                                                    |          | 6.04                                                 | Airport density .....                                     | 56       |
|                                                      |                                                    |          | <b>Ground transport infrastructure</b>               |                                                           |          |
|                                                      |                                                    |          | 7.01                                                 | Road infrastructure .....                                 | 119      |
|                                                      |                                                    |          | 7.03                                                 | Port infrastructure .....                                 | 99       |
|                                                      |                                                    |          | 7.04                                                 | Domestic transport network .....                          | 91       |
|                                                      |                                                    |          | 7.02                                                 | Railroad infrastructure .....                             | 80       |
|                                                      |                                                    |          | <b>Tourism infrastructure</b>                        |                                                           |          |
|                                                      |                                                    |          | 8.02                                                 | Presence of major car rental companies.....               | 102      |
|                                                      |                                                    |          | <b>ICT infrastructure</b>                            |                                                           |          |
|                                                      |                                                    |          | 9.02                                                 | Internet users .....                                      | 114      |
|                                                      |                                                    |          | 9.03                                                 | Telephone lines.....                                      | 106      |
|                                                      |                                                    |          | 9.01                                                 | Extent of business Internet use .....                     | 72       |
|                                                      |                                                    |          | <b>Price competitiveness in the T&amp;T industry</b> |                                                           |          |
|                                                      |                                                    |          | 10.01                                                | Ticket taxes and airport charges.....                     | 98       |
|                                                      |                                                    |          | <b>Human resources</b>                               |                                                           |          |
|                                                      |                                                    |          | 11.04                                                | Local availability of research and training services..... | 121      |
|                                                      |                                                    |          | 11.02                                                | Secondary education enrollment.....                       | 115      |
|                                                      |                                                    |          | 11.09                                                | Malaria incidence.....                                    | 111      |
|                                                      |                                                    |          | 11.03                                                | Quality of the educational system .....                   | 110      |
|                                                      |                                                    |          | 11.10                                                | Tuberculosis incidence .....                              | 109      |
|                                                      |                                                    |          | 11.01                                                | Primary education enrollment .....                        | 108      |
|                                                      |                                                    |          | 11.11                                                | Life expectancy .....                                     | 101      |
|                                                      |                                                    |          | 11.08                                                | HIV prevalence .....                                      | 78       |
|                                                      |                                                    |          | 11.05                                                | Extent of staff training.....                             | 77       |
|                                                      |                                                    |          | <b>Natural and cultural resources</b>                |                                                           |          |
|                                                      |                                                    |          | 13.02                                                | Carbon dioxide damage.....                                | 108      |
|                                                      |                                                    |          | 13.03                                                | Nationally protected areas.....                           | 97       |
|                                                      |                                                    |          | 13.05                                                | Risk of malaria and yellow fever .....                    | 90       |
|                                                      |                                                    |          | 13.01                                                | Number of World Heritage sites .....                      | 73       |
|                                                      |                                                    |          | 13.04                                                | Business concern for ecosystems .....                     | 63       |



# Mauritius

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 1.2    |
| Surface area (1,000 square kilometers) .....              | 2.0    |
| Gross domestic product (US\$ billions), 2005 .....        | 6.2    |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 12,895 |
| Real GDP growth (percent), 2005 .....                     | 3.4    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

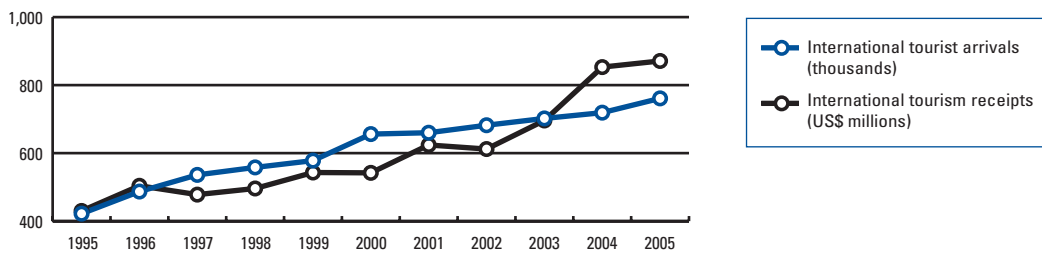
|                               |     | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-----|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 844 | 11.8                | 4.4                                         |
| Employment (1,000 jobs) ..... | 71  | 13.7                | 1.9                                         |

### T&T economy, 2006 estimates

|                               |       |      |     |
|-------------------------------|-------|------|-----|
| GDP (US\$ millions) .....     | 1,888 | 26.3 | 4.5 |
| Employment (1,000 jobs) ..... | 147   | 28.1 | 1.9 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2005 .....         | 761 |
| International tourism receipts (US\$ millions), 2005 ..... | 871 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>39</b>            | <b>4.6</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>35</b>            | <b>5.0</b>           |
| Policy rules and regulations .....                           | 63                   | 4.7                  |
| Environmental regulation .....                               | 34                   | 4.7                  |
| Safety and security .....                                    | 40                   | 5.0                  |
| Health and hygiene .....                                     | 46                   | 5.2                  |
| Prioritization of T&T strategies .....                       | 9                    | 5.2                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>46</b>            | <b>3.8</b>           |
| Air transport infrastructure .....                           | 60                   | 3.1                  |
| Ground transport infrastructure .....                        | 53                   | 3.8                  |
| Tourism infrastructure .....                                 | 38                   | 4.0                  |
| ICT infrastructure .....                                     | 59                   | 2.7                  |
| Price competitiveness in T&T industry .....                  | 20                   | 5.2                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>39</b>            | <b>5.1</b>           |
| Human resources .....                                        | 89                   | 4.8                  |
| Education and training .....                                 | 58                   | 4.8                  |
| Availability of qualified labor .....                        | 117                  | 3.3                  |
| Workforce wellness .....                                     | 70                   | 6.3                  |
| National tourism perception .....                            | 14                   | 6.1                  |
| Natural and cultural resources .....                         | 50                   | 4.5                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                   | Rank/124 | COMPETITIVE DISADVANTAGES                                         | Rank/124 |
|----------------------------------------------------------|----------|-------------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                      |          | <b>Policy rules and regulations</b>                               |          |
| 1.02 Property rights.....28                              |          | 1.05 Openness of bilateral Air Service Agreements .....97         |          |
| <b>Environmental regulation</b>                          |          | 1.01 Foreign ownership restrictions.....78                        |          |
| 2.03 Government prioritization of sustainable T&T .....7 |          | 1.03 Rules governing foreign direct investment .....69            |          |
| <b>Safety and security</b>                               |          | 1.04 Visa requirements .....43                                    |          |
| 3.01 Business costs of terrorism .....14                 |          | <b>Environmental regulation</b>                                   |          |
| <b>Health and hygiene</b>                                |          | 2.01 Stringency of environmental regulation .....47               |          |
| 4.04 Access to improved drinking water .....1            |          | 2.02 Clarity and stability of environmental regulations .....47   |          |
| 4.03 Access to improved sanitation .....36               |          | <b>Safety and security</b>                                        |          |
| <b>Prioritization of Travel &amp; Tourism</b>            |          | 3.02 Reliability of police services .....56                       |          |
| 5.01 Government prioritization of the T&T industry.....1 |          | 3.03 Business costs of crime and violence.....52                  |          |
| 5.02 T&T government expenditure .....3                   |          | <b>Health and hygiene</b>                                         |          |
| 5.03 Effectiveness of marketing and branding .....22     |          | 4.02 Physician density .....79                                    |          |
| <b>Air transport infrastructure</b>                      |          | 4.01 Gov't efforts to reduce health risks from pandemics .....50  |          |
| 6.03 Departures per 1,000 population.....26              |          | <b>Prioritization of Travel &amp; Tourism</b>                     |          |
| 6.01 Quality of air transport infrastructure .....38     |          | 5.04 T&T fair attendance .....90                                  |          |
| <b>Ground transport infrastructure</b>                   |          | <b>Air transport infrastructure</b>                               |          |
| 7.03 Port infrastructure .....32                         |          | 6.05 Number of operating airlines .....86                         |          |
| <b>Tourism infrastructure</b>                            |          | 6.04 Airport density .....75                                      |          |
| 8.01 Hotel rooms.....31                                  |          | 6.02 Available seat kilometers.....56                             |          |
| 8.02 Presence of major car rental companies.....35       |          | 6.06 International air transport network .....42                  |          |
| <b>Price competitiveness in the T&amp;T industry</b>     |          | <b>Ground transport infrastructure</b>                            |          |
| 10.03 Extent and effect of taxation.....17               |          | 7.02 Railroad infrastructure .....88                              |          |
| <b>Human resources</b>                                   |          | 7.04 Domestic transport network .....60                           |          |
| 11.01 Primary education enrollment .....1                |          | 7.01 Road infrastructure .....43                                  |          |
| 11.08 HIV prevalence .....1                              |          | <b>Tourism infrastructure</b>                                     |          |
| 11.05 Extent of staff training.....33                    |          | 8.03 ATMs accepting Visa cards .....44                            |          |
| <b>National tourism perception</b>                       |          | <b>ICT infrastructure</b>                                         |          |
| 12.01 Tourism openness .....8                            |          | 9.01 Extent of business Internet use .....103                     |          |
| 12.02 Attitude toward tourists .....31                   |          | 9.02 Internet users .....54                                       |          |
| <b>Natural and cultural resources</b>                    |          | 9.03 Telephone lines.....42                                       |          |
| 13.04 Business concern for ecosystems .....36            |          | <b>Price competitiveness in the T&amp;T industry</b>              |          |
|                                                          |          | 10.01 Ticket taxes and airport charges.....71                     |          |
|                                                          |          | 10.02 Purchasing power parity.....42                              |          |
|                                                          |          | 10.04 Fuel price level .....40                                    |          |
|                                                          |          | <b>Human resources</b>                                            |          |
|                                                          |          | 11.06 Hiring and firing practices.....115                         |          |
|                                                          |          | 11.07 Ease of hiring foreign labor .....107                       |          |
|                                                          |          | 11.04 Local availability of research and training services.....85 |          |
|                                                          |          | 11.10 Tuberculosis incidence .....79                              |          |
|                                                          |          | 11.03 Quality of the educational system .....65                   |          |
|                                                          |          | 11.02 Secondary education enrollment.....62                       |          |
|                                                          |          | 11.11 Life expectancy .....53                                     |          |
|                                                          |          | <b>National tourism perception</b>                                |          |
|                                                          |          | 12.03 Recommendation to extend business trips .....50             |          |
|                                                          |          | <b>Natural and cultural resources</b>                             |          |
|                                                          |          | 13.01 Number of World Heritage sites .....87                      |          |
|                                                          |          | 13.02 Carbon dioxide damage.....48                                |          |

# Mexico

## Key indicators

|                                                           |         |
|-----------------------------------------------------------|---------|
| Population (millions), 2005 .....                         | 103.1   |
| Surface area (1,000 square kilometers) .....              | 1,958.2 |
| Gross domestic product (US\$ billions), 2005 .....        | 768.4   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 10,186  |
| Real GDP growth (percent), 2005 .....                     | 3.0     |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

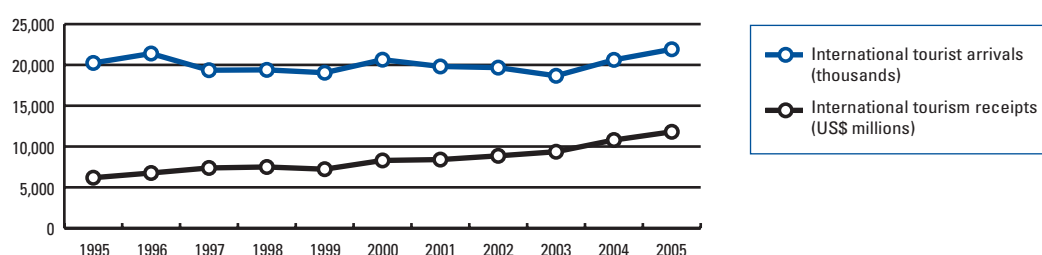
|                               |        | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|--------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 41,975 | 5.2                 | 3.4                                         |
| Employment (1,000 jobs) ..... | 1,566  | 6.0                 | 2.3                                         |

### T&T economy, 2006 estimates

|                               |         |      |     |
|-------------------------------|---------|------|-----|
| GDP (US\$ millions) .....     | 118,361 | 14.7 | 5.0 |
| Employment (1,000 jobs) ..... | 4,988   | 19.1 | 4.6 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |        |
|------------------------------------------------------------|--------|
| International tourist arrivals (1,000), 2005 .....         | 21,915 |
| International tourism receipts (US\$ millions), 2005 ..... | 11,803 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index .....</b>                                      | <b>49</b>            | <b>4.4</b>           |
| <b>T&amp;T regulatory framework .....</b>                    | <b>48</b>            | <b>4.5</b>           |
| Policy rules and regulations .....                           | 33                   | 5.1                  |
| Environmental regulation .....                               | 47                   | 4.3                  |
| Safety and security .....                                    | 104                  | 3.5                  |
| Health and hygiene .....                                     | 49                   | 5.0                  |
| Prioritization of T&T strategies .....                       | 29                   | 4.7                  |
| <b>T&amp;T business environment and infrastructure .....</b> | <b>57</b>            | <b>3.6</b>           |
| Air transport infrastructure .....                           | 32                   | 3.9                  |
| Ground transport infrastructure .....                        | 62                   | 3.6                  |
| Tourism infrastructure .....                                 | 47                   | 3.6                  |
| ICT infrastructure .....                                     | 60                   | 2.7                  |
| Price competitiveness in T&T industry .....                  | 85                   | 4.2                  |
| <b>T&amp;T human, cultural, and natural resources .....</b>  | <b>50</b>            | <b>5.0</b>           |
| Human resources .....                                        | 50                   | 5.2                  |
| Education and training .....                                 | 61                   | 4.8                  |
| Availability of qualified labor .....                        | 63                   | 4.4                  |
| Workforce wellness .....                                     | 42                   | 6.6                  |
| National tourism perception .....                            | 91                   | 4.5                  |
| Natural and cultural resources .....                         | 29                   | 5.2                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                             | Rank/124 | COMPETITIVE DISADVANTAGES                                       | Rank/124 |
|--------------------------------------------------------------------|----------|-----------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                                |          | <b>Policy rules and regulations</b>                             |          |
| 1.04 Visa requirements .....15                                     |          | 1.02 Property rights .....60                                    |          |
| 1.05 Openness of bilateral Air Service Agreements .....21          |          |                                                                 |          |
| 1.01 Foreign ownership restrictions .....31                        |          | <b>Environmental regulation</b>                                 |          |
| 1.03 Rules governing foreign direct investment .....38             |          | 2.02 Clarity and stability of environmental regulations .....51 |          |
|                                                                    |          | 2.01 Stringency of environmental regulation .....49             |          |
| <b>Environmental regulation</b>                                    |          |                                                                 |          |
| 2.03 Government prioritization of sustainable T&T .....43          |          | <b>Safety and security</b>                                      |          |
|                                                                    |          | 3.03 Business costs of crime and violence .....116              |          |
| <b>Health and hygiene</b>                                          |          | 3.02 Reliability of police services .....104                    |          |
| 4.01 Gov't efforts to reduce health risks from pandemics .....45   |          | 3.01 Business costs of terrorism .....51                        |          |
|                                                                    |          |                                                                 |          |
| <b>Prioritization of Travel &amp; Tourism</b>                      |          | <b>Health and hygiene</b>                                       |          |
| 5.04 T&T fair attendance .....23                                   |          | 4.03 Access to improved sanitation .....59                      |          |
| 5.03 Effectiveness of marketing and branding .....25               |          | 4.04 Access to improved drinking water .....58                  |          |
| 5.02 T&T government expenditure .....33                            |          | 4.02 Physician density .....53                                  |          |
| 5.01 Government prioritization of the T&T industry .....39         |          |                                                                 |          |
|                                                                    |          | <b>Air transport infrastructure</b>                             |          |
| <b>Air transport infrastructure</b>                                |          | 6.03 Departures per 1,000 population .....57                    |          |
| 6.02 Available seat kilometers .....18                             |          | 6.01 Quality of air transport infrastructure .....55            |          |
| 6.05 Number of operating airlines .....28                          |          |                                                                 |          |
| 6.04 Airport density .....34                                       |          | <b>Ground transport infrastructure</b>                          |          |
| 6.06 International air transport network .....38                   |          | 7.02 Railroad infrastructure .....65                            |          |
|                                                                    |          | 7.03 Port infrastructure .....64                                |          |
| <b>Ground transport infrastructure</b>                             |          | 7.01 Road infrastructure .....49                                |          |
| 7.04 Domestic transport network .....48                            |          |                                                                 |          |
|                                                                    |          | <b>Tourism infrastructure</b>                                   |          |
| <b>Tourism infrastructure</b>                                      |          | 8.03 ATMs accepting Visa cards .....49                          |          |
| 8.02 Presence of major car rental companies .....35                |          |                                                                 |          |
| 8.01 Hotel rooms .....47                                           |          | <b>ICT infrastructure</b>                                       |          |
|                                                                    |          | 9.03 Telephone lines .....64                                    |          |
| <b>Price competitiveness in the T&amp;T industry</b>               |          | 9.01 Extent of business Internet use .....56                    |          |
| 10.04 Fuel price level .....30                                     |          | 9.02 Internet users .....56                                     |          |
|                                                                    |          |                                                                 |          |
| <b>Human resources</b>                                             |          | <b>Price competitiveness in the T&amp;T industry</b>            |          |
| 11.01 Primary education enrollment .....1                          |          | 10.01 Ticket taxes and airport charges .....114                 |          |
| 11.11 Life expectancy .....45                                      |          | 10.02 Purchasing power parity .....86                           |          |
| 11.04 Local availability of research and training services .....47 |          | 10.03 Extent and effect of taxation .....74                     |          |
| 11.05 Extent of staff training .....47                             |          |                                                                 |          |
| 11.10 Tuberculosis incidence .....47                               |          | <b>Human resources</b>                                          |          |
|                                                                    |          | 11.03 Quality of the educational system .....82                 |          |
| <b>National tourism perception</b>                                 |          | 11.02 Secondary education enrollment .....74                    |          |
| 12.02 Attitude toward tourists .....27                             |          | 11.06 Hiring and firing practices .....67                       |          |
|                                                                    |          | 11.08 HIV prevalence .....62                                    |          |
| <b>Natural and cultural resources</b>                              |          | 11.07 Ease of hiring foreign labor .....54                      |          |
| 13.01 Number of World Heritage sites .....7                        |          |                                                                 |          |
| 13.03 Nationally protected areas .....44                           |          | <b>National tourism perception</b>                              |          |
|                                                                    |          | 12.01 Tourism openness .....91                                  |          |
|                                                                    |          | 12.03 Recommendation to extend business trips .....70           |          |
|                                                                    |          |                                                                 |          |
|                                                                    |          | <b>Natural and cultural resources</b>                           |          |
|                                                                    |          | 13.04 Business concern for ecosystems .....74                   |          |
|                                                                    |          | 13.02 Carbon dioxide damage .....59                             |          |

# Moldova

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 4.2   |
| Surface area (1,000 square kilometers) .....              | 33.8  |
| Gross domestic product (US\$ billions), 2005 .....        | 2.9   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 2,527 |
| Real GDP growth (percent), 2005 .....                     | 7.1   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

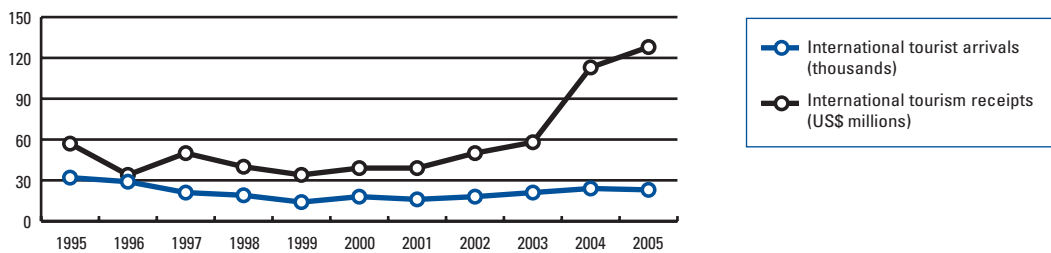
|                               |     | Percent of total | 2007–2016 annual growth (% forecast) |
|-------------------------------|-----|------------------|--------------------------------------|
| GDP (US\$ millions) .....     | n/a | n/a              | n/a                                  |
| Employment (1,000 jobs) ..... | n/a | n/a              | n/a                                  |

### T&T economy, 2006 estimates

|                               |     |     |     |
|-------------------------------|-----|-----|-----|
| GDP (US\$ millions) .....     | n/a | n/a | n/a |
| Employment (1,000 jobs) ..... | n/a | n/a | n/a |

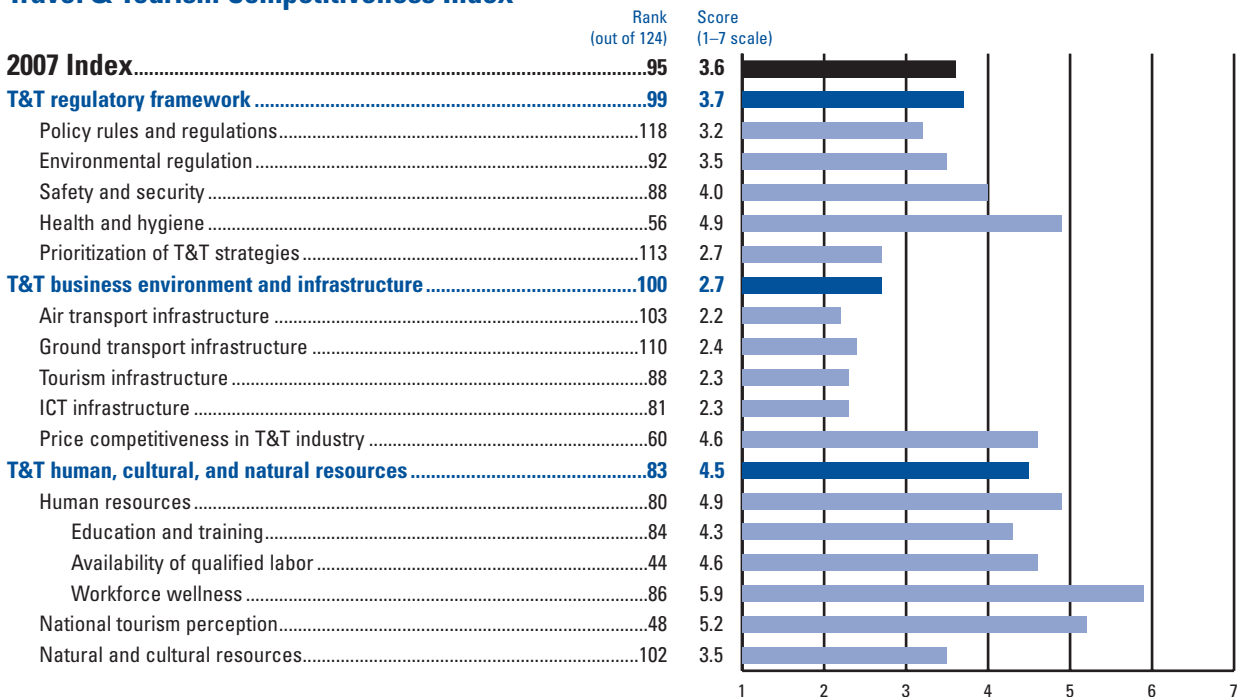
Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2005 .....         | 23  |
| International tourism receipts (US\$ millions), 2005 ..... | 128 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index



Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               |                                               | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                            | Rank/124 |
|------------------------------------------------------|-----------------------------------------------|----------|------------------------------------------------------|------------------------------------------------------------|----------|
| <b>Health and hygiene</b>                            |                                               |          | <b>Policy rules and regulations</b>                  |                                                            |          |
| 4.02                                                 | Physician density .....                       | 35       | 1.01                                                 | Foreign ownership restrictions .....                       | 118      |
| <b>Price competitiveness in the T&amp;T industry</b> |                                               |          | 1.05                                                 | Openness of bilateral Air Service Agreements .....         | 113      |
| 10.02                                                | Purchasing power parity .....                 | 35       | 1.03                                                 | Rules governing foreign direct investment .....            | 108      |
| <b>Human resources</b>                               |                                               |          | 1.02                                                 | Property rights .....                                      | 103      |
| 11.06                                                | Hiring and firing practices .....             | 36       | 1.04                                                 | Visa requirements .....                                    | 94       |
| 11.08                                                | HIV prevalence .....                          | 48       | <b>Environmental regulation</b>                      |                                                            |          |
| <b>National tourism perception</b>                   |                                               |          | 2.03                                                 | Government prioritization of sustainable T&T .....         | 95       |
| 12.01                                                | Tourism openness .....                        | 27       | 2.01                                                 | Stringency of environmental regulation .....               | 91       |
| 12.03                                                | Recommendation to extend business trips ..... | 46       | 2.02                                                 | Clarity and stability of environmental regulations .....   | 72       |
| <b>Natural and cultural resources</b>                |                                               |          | <b>Safety and security</b>                           |                                                            |          |
| 13.05                                                | Risk of malaria and yellow fever .....        | 1        | 3.02                                                 | Reliability of police services .....                       | 98       |
|                                                      |                                               |          | 3.01                                                 | Business costs of terrorism .....                          | 79       |
|                                                      |                                               |          | 3.03                                                 | Business costs of crime and violence .....                 | 71       |
|                                                      |                                               |          | <b>Health and hygiene</b>                            |                                                            |          |
|                                                      |                                               |          | 4.01                                                 | Gov't efforts to reduce health risks from pandemics .....  | 96       |
|                                                      |                                               |          | 4.03                                                 | Access to improved sanitation .....                        | 66       |
|                                                      |                                               |          | 4.04                                                 | Access to improved drinking water .....                    | 53       |
|                                                      |                                               |          | <b>Prioritization of Travel &amp; Tourism</b>        |                                                            |          |
|                                                      |                                               |          | 5.01                                                 | Government prioritization of the T&T industry .....        | 109      |
|                                                      |                                               |          | 5.03                                                 | Effectiveness of marketing and branding .....              | 109      |
|                                                      |                                               |          | 5.04                                                 | T&T fair attendance .....                                  | 105      |
|                                                      |                                               |          | <b>Air transport infrastructure</b>                  |                                                            |          |
|                                                      |                                               |          | 6.02                                                 | Available seat kilometers .....                            | 117      |
|                                                      |                                               |          | 6.05                                                 | Number of operating airlines .....                         | 110      |
|                                                      |                                               |          | 6.06                                                 | International air transport network .....                  | 95       |
|                                                      |                                               |          | 6.03                                                 | Departures per 1,000 population .....                      | 79       |
|                                                      |                                               |          | 6.01                                                 | Quality of air transport infrastructure .....              | 74       |
|                                                      |                                               |          | 6.04                                                 | Airport density .....                                      | 73       |
|                                                      |                                               |          | <b>Ground transport infrastructure</b>               |                                                            |          |
|                                                      |                                               |          | 7.01                                                 | Road infrastructure .....                                  | 123      |
|                                                      |                                               |          | 7.03                                                 | Port infrastructure .....                                  | 118      |
|                                                      |                                               |          | 7.04                                                 | Domestic transport network .....                           | 96       |
|                                                      |                                               |          | 7.02                                                 | Railroad infrastructure .....                              | 59       |
|                                                      |                                               |          | <b>Tourism infrastructure</b>                        |                                                            |          |
|                                                      |                                               |          | 8.01                                                 | Hotel rooms .....                                          | 100      |
|                                                      |                                               |          | 8.03                                                 | ATMs accepting Visa cards .....                            | 72       |
|                                                      |                                               |          | 8.02                                                 | Presence of major car rental companies .....               | 66       |
|                                                      |                                               |          | <b>ICT infrastructure</b>                            |                                                            |          |
|                                                      |                                               |          | 9.01                                                 | Extent of business Internet use .....                      | 120      |
|                                                      |                                               |          | 9.02                                                 | Internet users .....                                       | 64       |
|                                                      |                                               |          | 9.03                                                 | Telephone lines .....                                      | 59       |
|                                                      |                                               |          | <b>Price competitiveness in the T&amp;T industry</b> |                                                            |          |
|                                                      |                                               |          | 10.03                                                | Extent and effect of taxation .....                        | 105      |
|                                                      |                                               |          | 10.01                                                | Ticket taxes and airport charges .....                     | 72       |
|                                                      |                                               |          | <b>Human resources</b>                               |                                                            |          |
|                                                      |                                               |          | 11.01                                                | Primary education enrollment .....                         | 107      |
|                                                      |                                               |          | 11.05                                                | Extent of staff training .....                             | 102      |
|                                                      |                                               |          | 11.04                                                | Local availability of research and training services ..... | 94       |
|                                                      |                                               |          | 11.10                                                | Tuberculosis incidence .....                               | 90       |
|                                                      |                                               |          | 11.11                                                | Life expectancy .....                                      | 83       |
|                                                      |                                               |          | 11.03                                                | Quality of the educational system .....                    | 69       |
|                                                      |                                               |          | 11.02                                                | Secondary education enrollment .....                       | 68       |
|                                                      |                                               |          | 11.07                                                | Ease of hiring foreign labor .....                         | 59       |

(Disadvantages cont'd. from bottom of right column)

&lt;&lt;&lt; (Cont'd. on bottom of left column)

# Mongolia

## Key indicators

|                                                           |         |
|-----------------------------------------------------------|---------|
| Population (millions), 2005 .....                         | 2.6     |
| Surface area (1,000 square kilometers) .....              | 1,566.5 |
| Gross domestic product (US\$ billions), 2005 .....        | 1.9     |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 2,175   |
| Real GDP growth (percent), 2005 .....                     | 6.2     |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

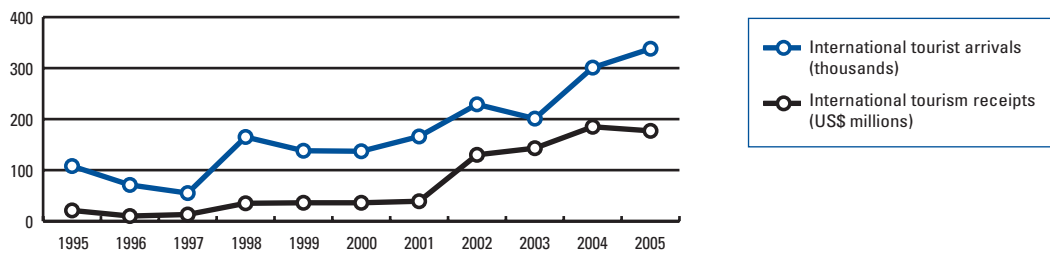
|                               |     | Percent of total | 2007–2016 annual growth (% forecast) |
|-------------------------------|-----|------------------|--------------------------------------|
| GDP (US\$ millions) .....     | n/a | n/a              | n/a                                  |
| Employment (1,000 jobs) ..... | n/a | n/a              | n/a                                  |

### T&T economy, 2006 estimates

|                               |     |     |     |
|-------------------------------|-----|-----|-----|
| GDP (US\$ millions) .....     | n/a | n/a | n/a |
| Employment (1,000 jobs) ..... | n/a | n/a | n/a |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2005 .....         | 338 |
| International tourism receipts (US\$ millions), 2005 ..... | 177 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank (out of 124) | Score (1–7 scale) |
|--------------------------------------------------------------|-------------------|-------------------|
| <b>2007 Index</b> .....                                      | <b>91</b>         | <b>3.7</b>        |
| <b>T&amp;T regulatory framework</b> .....                    | <b>92</b>         | <b>3.7</b>        |
| Policy rules and regulations .....                           | 94                | 3.8               |
| Environmental regulation .....                               | 117               | 2.9               |
| Safety and security .....                                    | 77                | 4.1               |
| Health and hygiene .....                                     | 75                | 4.3               |
| Prioritization of T&T strategies .....                       | 68                | 3.7               |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>109</b>        | <b>2.6</b>        |
| Air transport infrastructure .....                           | 96                | 2.3               |
| Ground transport infrastructure .....                        | 109               | 2.4               |
| Tourism infrastructure .....                                 | 116               | 1.5               |
| ICT infrastructure .....                                     | 91                | 2.0               |
| Price competitiveness in T&T industry .....                  | 52                | 4.7               |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>55</b>         | <b>4.9</b>        |
| Human resources .....                                        | 68                | 5.1               |
| Education and training .....                                 | 70                | 4.6               |
| Availability of qualified labor .....                        | 26                | 4.8               |
| Workforce wellness .....                                     | 89                | 5.8               |
| National tourism perception .....                            | 11                | 6.2               |
| Natural and cultural resources .....                         | 105               | 3.3               |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."



## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               |                                        | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                            | Rank/124 |
|------------------------------------------------------|----------------------------------------|----------|------------------------------------------------------|------------------------------------------------------------|----------|
| <b>Safety and security</b>                           |                                        |          | <b>Policy rules and regulations</b>                  |                                                            |          |
| 3.01                                                 | Business costs of terrorism .....      | 31       | 1.05                                                 | Openness of bilateral Air Service Agreements .....         | 104      |
| <b>Health and hygiene</b>                            |                                        |          | 1.04                                                 | Visa requirements .....                                    | 94       |
| 4.02                                                 | Physician density .....                | 36       | 1.02                                                 | Property rights .....                                      | 80       |
| <b>Prioritization of Travel &amp; Tourism</b>        |                                        |          | 1.03                                                 | Rules governing foreign direct investment .....            | 71       |
| 5.04                                                 | T&T fair attendance .....              | 48       | 1.01                                                 | Foreign ownership restrictions .....                       | 66       |
| <b>Air transport infrastructure</b>                  |                                        |          | <b>Environmental regulation</b>                      |                                                            |          |
| 6.04                                                 | Airport density .....                  | 35       | 2.01                                                 | Stringency of environmental regulation .....               | 122      |
| 6.03                                                 | Departures per 1,000 population .....  | 40       | 2.02                                                 | Clarity and stability of environmental regulations .....   | 117      |
| <b>Price competitiveness in the T&amp;T industry</b> |                                        |          | 2.03                                                 | Government prioritization of sustainable T&T .....         | 101      |
| 10.02                                                | Purchasing power parity .....          | 30       | <b>Safety and security</b>                           |                                                            |          |
| 10.01                                                | Ticket taxes and airport charges ..... | 38       | 3.02                                                 | Reliability of police services .....                       | 106      |
| <b>Human resources</b>                               |                                        |          | 3.03                                                 | Business costs of crime and violence .....                 | 75       |
| 11.01                                                | Primary education enrollment .....     | 1        | <b>Health and hygiene</b>                            |                                                            |          |
| 11.08                                                | HIV prevalence .....                   | 1        | 4.04                                                 | Access to improved drinking water .....                    | 99       |
| 11.09                                                | Malaria incidence .....                | 1        | 4.01                                                 | Gov't efforts to reduce health risks from pandemics .....  | 77       |
| 11.06                                                | Hiring and firing practices .....      | 12       | 4.03                                                 | Access to improved sanitation .....                        | 77       |
| <b>National tourism perception</b>                   |                                        |          | <b>Prioritization of Travel &amp; Tourism</b>        |                                                            |          |
| 12.01                                                | Tourism openness .....                 | 5        | 5.03                                                 | Effectiveness of marketing and branding .....              | 110      |
| <b>Natural and cultural resources</b>                |                                        |          | 5.01                                                 | Government prioritization of the T&T industry .....        | 67       |
| 13.05                                                | Risk of malaria and yellow fever ..... | 1        | <b>Air transport infrastructure</b>                  |                                                            |          |
| 13.03                                                | Nationally protected areas .....       | 38       | 6.06                                                 | International air transport network .....                  | 115      |
|                                                      |                                        |          | 6.01                                                 | Quality of air transport infrastructure .....              | 112      |
|                                                      |                                        |          | 6.05                                                 | Number of operating airlines .....                         | 111      |
|                                                      |                                        |          | 6.02                                                 | Available seat kilometers .....                            | 107      |
|                                                      |                                        |          | <b>Ground transport infrastructure</b>               |                                                            |          |
|                                                      |                                        |          | 7.01                                                 | Road infrastructure .....                                  | 118      |
|                                                      |                                        |          | 7.03                                                 | Port infrastructure .....                                  | 114      |
|                                                      |                                        |          | 7.04                                                 | Domestic transport network .....                           | 106      |
|                                                      |                                        |          | 7.02                                                 | Railroad infrastructure .....                              | 63       |
|                                                      |                                        |          | <b>Tourism infrastructure</b>                        |                                                            |          |
|                                                      |                                        |          | 8.02                                                 | Presence of major car rental companies .....               | 113      |
|                                                      |                                        |          | 8.03                                                 | ATMs accepting Visa cards .....                            | 97       |
|                                                      |                                        |          | <b>ICT infrastructure</b>                            |                                                            |          |
|                                                      |                                        |          | 9.01                                                 | Extent of business Internet use .....                      | 98       |
|                                                      |                                        |          | 9.03                                                 | Telephone lines .....                                      | 91       |
|                                                      |                                        |          | 9.02                                                 | Internet users .....                                       | 74       |
|                                                      |                                        |          | <b>Price competitiveness in the T&amp;T industry</b> |                                                            |          |
|                                                      |                                        |          | 10.03                                                | Extent and effect of taxation .....                        | 115      |
|                                                      |                                        |          | 10.04                                                | Fuel price level .....                                     | 61       |
|                                                      |                                        |          | <b>Human resources</b>                               |                                                            |          |
|                                                      |                                        |          | 11.03                                                | Quality of the educational system .....                    | 96       |
|                                                      |                                        |          | 11.10                                                | Tuberculosis incidence .....                               | 89       |
|                                                      |                                        |          | 11.11                                                | Life expectancy .....                                      | 89       |
|                                                      |                                        |          | 11.07                                                | Ease of hiring foreign labor .....                         | 85       |
|                                                      |                                        |          | 11.05                                                | Extent of staff training .....                             | 84       |
|                                                      |                                        |          | 11.04                                                | Local availability of research and training services ..... | 78       |
|                                                      |                                        |          | 11.02                                                | Secondary education enrollment .....                       | 52       |
|                                                      |                                        |          | <b>National tourism perception</b>                   |                                                            |          |
|                                                      |                                        |          | 12.02                                                | Attitude toward tourists .....                             | 103      |
|                                                      |                                        |          | 12.03                                                | Recommendation to extend business trips .....              | 62       |
|                                                      |                                        |          | <b>Natural and cultural resources</b>                |                                                            |          |
|                                                      |                                        |          | 13.04                                                | Business concern for ecosystems .....                      | 123      |
|                                                      |                                        |          | 13.02                                                | Carbon dioxide damage .....                                | 119      |
|                                                      |                                        |          | 13.01                                                | Number of World Heritage sites .....                       | 73       |

# Morocco

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 30.2  |
| Surface area (1,000 square kilometers) .....              | 446.6 |
| Gross domestic product (US\$ billions), 2005 .....        | 51.6  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 4,503 |
| Real GDP growth (percent), 2005 .....                     | 1.7   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

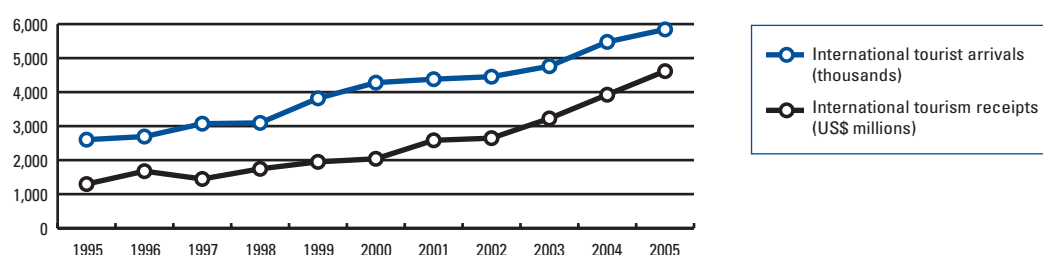
|                               |       | Percent of total | 2007-2016 annual growth (% forecast) |
|-------------------------------|-------|------------------|--------------------------------------|
| GDP (US\$ millions) .....     | 5,601 | 10.1             | 4.6                                  |
| Employment (1,000 jobs) ..... | 1,036 | 8.8              | 3.3                                  |

### T&T economy, 2006 estimates

|                               |       |      |     |
|-------------------------------|-------|------|-----|
| GDP (US\$ millions) .....     | 9,927 | 17.9 | 4.7 |
| Employment (1,000 jobs) ..... | 1,813 | 15.5 | 3.4 |

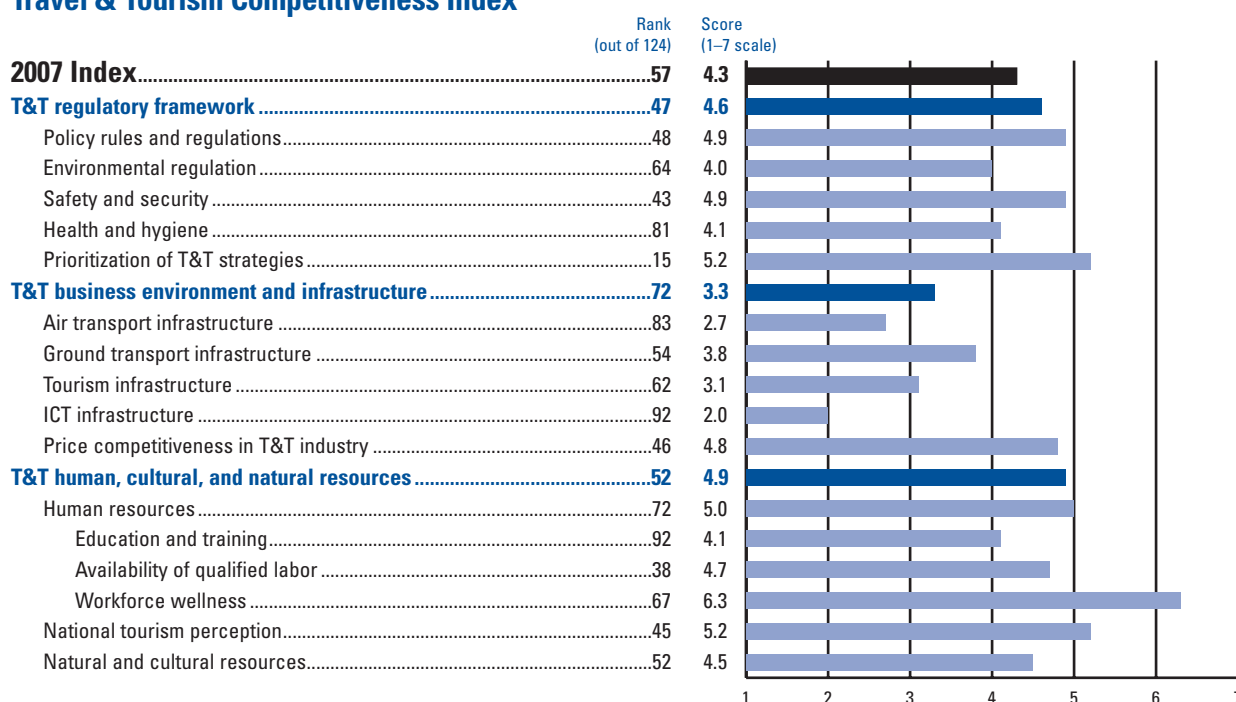
Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 5,843 |
| International tourism receipts (US\$ millions), 2005 ..... | 4,617 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index



Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                           | Rank/124 | COMPETITIVE DISADVANTAGES                                         | Rank/124 |
|------------------------------------------------------------------|----------|-------------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                              |          | <b>Policy rules and regulations</b>                               |          |
| 1.04 Visa requirements .....15                                   |          | 1.03 Rules governing foreign direct investment .....60            |          |
| 1.01 Foreign ownership restrictions.....47                       |          | 1.02 Property rights.....56                                       |          |
|                                                                  |          | 1.05 Openness of bilateral Air Service Agreements .....54         |          |
| <b>Environmental regulation</b>                                  |          | <b>Environmental regulation</b>                                   |          |
| 2.03 Government prioritization of sustainable T&T .....18        |          | 2.02 Clarity and stability of environmental regulations .....91   |          |
|                                                                  |          | 2.01 Stringency of environmental regulation .....82               |          |
| <b>Safety and security</b>                                       |          | <b>Safety and security</b>                                        |          |
| 3.02 Reliability of police services .....35                      |          | 3.01 Business costs of terrorism .....88                          |          |
| 3.03 Business costs of crime and violence.....44                 |          |                                                                   |          |
| <b>Health and hygiene</b>                                        |          | <b>Health and hygiene</b>                                         |          |
| 4.01 Gov't efforts to reduce health risks from pandemics .....42 |          | 4.02 Physician density .....93                                    |          |
|                                                                  |          | 4.04 Access to improved drinking water .....83                    |          |
| <b>Prioritization of Travel &amp; Tourism</b>                    |          | 4.03 Access to improved sanitation .....74                        |          |
| 5.01 Government prioritization of the T&T industry.....16        |          |                                                                   |          |
| 5.03 Effectiveness of marketing and branding .....19             |          | <b>Air transport infrastructure</b>                               |          |
| 5.04 T&T fair attendance .....23                                 |          | 6.04 Airport density .....103                                     |          |
|                                                                  |          | 6.03 Departures per 1,000 population.....67                       |          |
| <b>Air transport infrastructure</b>                              |          | 6.06 International air transport network .....66                  |          |
| 6.05 Number of operating airlines .....47                        |          | 6.01 Quality of air transport infrastructure .....65              |          |
| 6.02 Available seat kilometers.....49                            |          |                                                                   |          |
| <b>Ground transport infrastructure</b>                           |          | <b>Ground transport infrastructure</b>                            |          |
| 7.02 Railroad infrastructure .....50                             |          | 7.01 Road infrastructure .....60                                  |          |
| 7.04 Domestic transport network .....50                          |          | 7.03 Port infrastructure .....53                                  |          |
|                                                                  |          |                                                                   |          |
| <b>Tourism infrastructure</b>                                    |          | <b>Tourism infrastructure</b>                                     |          |
| 8.02 Presence of major car rental companies.....35               |          | 8.03 ATMs accepting Visa cards .....70                            |          |
|                                                                  |          | 8.01 Hotel rooms.....65                                           |          |
| <b>Price competitiveness in the T&amp;T industry</b>             |          | <b>ICT infrastructure</b>                                         |          |
| 10.02 Purchasing power parity .....41                            |          | 9.01 Extent of business Internet use .....109                     |          |
|                                                                  |          | 9.03 Telephone lines.....96                                       |          |
| <b>Human resources</b>                                           |          | 9.02 Internet users .....59                                       |          |
| 11.01 Primary education enrollment .....1                        |          |                                                                   |          |
| 11.08 HIV prevalence .....25                                     |          | <b>Price competitiveness in the T&amp;T industry</b>              |          |
| 11.07 Ease of hiring foreign labor .....41                       |          | 10.04 Fuel price level .....65                                    |          |
| 11.06 Hiring and firing practices.....49                         |          | 10.03 Extent and effect of taxation.....63                        |          |
|                                                                  |          | 10.01 Ticket taxes and airport charges.....62                     |          |
| <b>National tourism perception</b>                               |          |                                                                   |          |
| 12.01 Tourism openness .....28                                   |          | <b>Human resources</b>                                            |          |
| 12.02 Attitude toward tourists .....35                           |          | 11.02 Secondary education enrollment.....100                      |          |
| 12.03 Recommendation to extend business trips .....44            |          | 11.03 Quality of the educational system .....91                   |          |
|                                                                  |          | 11.05 Extent of staff training.....85                             |          |
| <b>Natural and cultural resources</b>                            |          | 11.10 Tuberculosis incidence .....73                              |          |
| 13.01 Number of World Heritage sites .....24                     |          | 11.11 Life expectancy .....66                                     |          |
|                                                                  |          | 11.04 Local availability of research and training services.....58 |          |
|                                                                  |          |                                                                   |          |
|                                                                  |          | <b>Natural and cultural resources</b>                             |          |
|                                                                  |          | 13.03 Nationally protected areas.....103                          |          |
|                                                                  |          | 13.04 Business concern for ecosystems .....97                     |          |
|                                                                  |          | 13.02 Carbon dioxide damage.....75                                |          |

# Mozambique

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 19.8  |
| Surface area (1,000 square kilometers) .....              | 801.6 |
| Gross domestic product (US\$ billions), 2005 .....        | 6.5   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 1,379 |
| Real GDP growth (percent), 2005 .....                     | 7.7   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

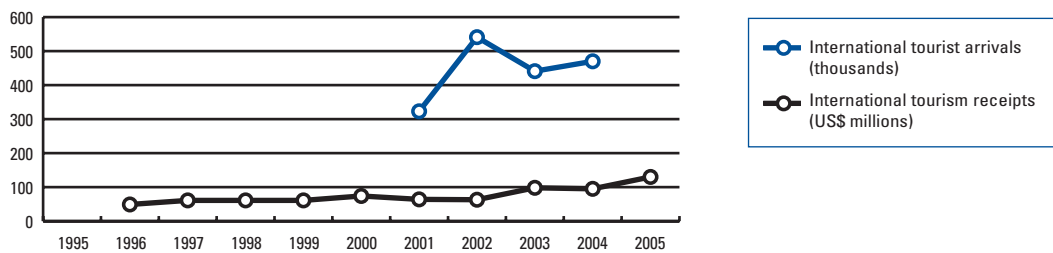
|                               |     | Percent of total | 2007–2016 annual growth (% forecast) |
|-------------------------------|-----|------------------|--------------------------------------|
| GDP (US\$ millions) .....     | n/a | n/a              | n/a                                  |
| Employment (1,000 jobs) ..... | n/a | n/a              | n/a                                  |

### T&T economy, 2006 estimates

|                               |     |     |     |
|-------------------------------|-----|-----|-----|
| GDP (US\$ millions) .....     | n/a | n/a | n/a |
| Employment (1,000 jobs) ..... | n/a | n/a | n/a |

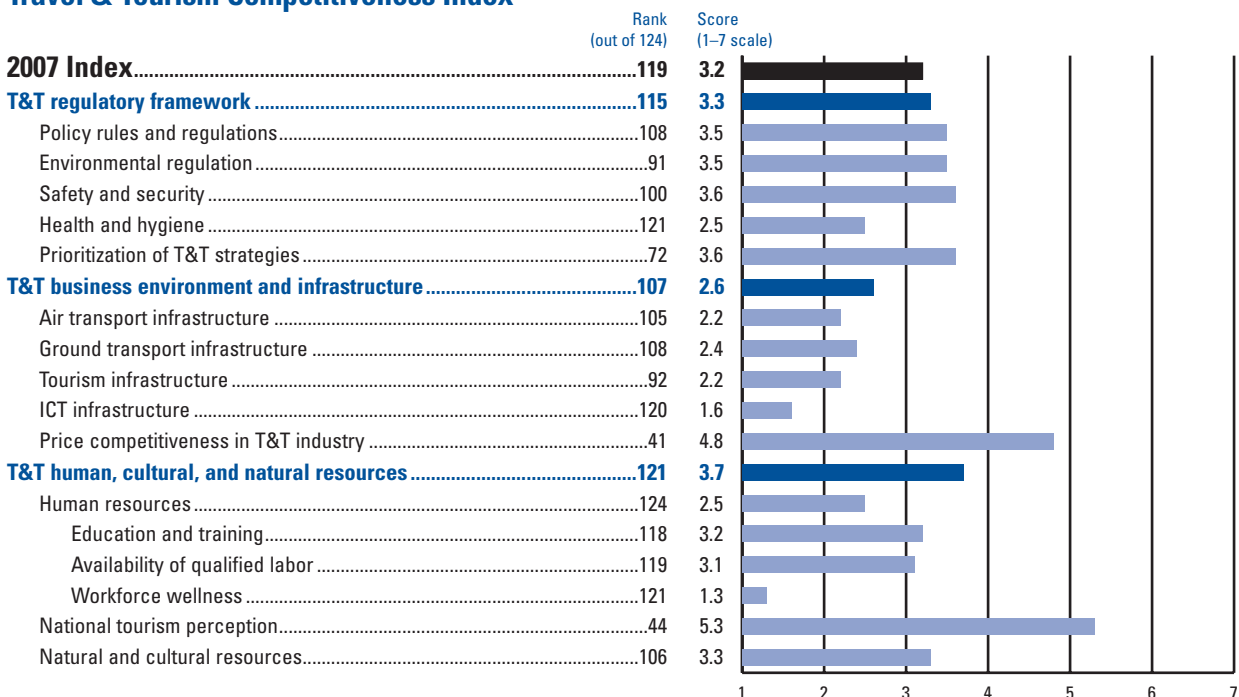
Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2004 .....         | 470 |
| International tourism receipts (US\$ millions), 2005 ..... | 130 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index



Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               |                                               | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                     | Rank/124 |
|------------------------------------------------------|-----------------------------------------------|----------|------------------------------------------------------|-----------------------------------------------------|----------|
| <b>Prioritization of Travel &amp; Tourism</b>        |                                               |          | <b>Policy rules and regulations</b>                  |                                                     |          |
| 5.01                                                 | Government prioritization of the T&T industry | 40       | 1.04                                                 | Visa requirements                                   | 113      |
| <b>Price competitiveness in the T&amp;T industry</b> |                                               |          | 1.02                                                 | Property rights                                     | 86       |
| 10.02                                                | Purchasing power parity                       | 18       | 1.05                                                 | Openness of bilateral Air Service Agreements        | 75       |
| 10.01                                                | Ticket taxes and airport charges              | 25       | 1.03                                                 | Rules governing foreign direct investment           | 74       |
| <b>National tourism perception</b>                   |                                               |          | 1.01                                                 | Foreign ownership restrictions                      | 64       |
| 12.01                                                | Tourism openness                              | 14       | <b>Environmental regulation</b>                      |                                                     |          |
| <b>Natural and cultural resources</b>                |                                               |          | 2.01                                                 | Stringency of environmental regulation              | 102      |
| 13.02                                                | Carbon dioxide damage                         | 21       | 2.02                                                 | Clarity and stability of environmental regulations  | 92       |
|                                                      |                                               |          | 2.03                                                 | Government prioritization of sustainable T&T        | 72       |
|                                                      |                                               |          | <b>Safety and security</b>                           |                                                     |          |
|                                                      |                                               |          | 3.02                                                 | Reliability of police services                      | 109      |
|                                                      |                                               |          | 3.03                                                 | Business costs of crime and violence                | 109      |
|                                                      |                                               |          | 3.01                                                 | Business costs of terrorism                         | 54       |
|                                                      |                                               |          | <b>Health and hygiene</b>                            |                                                     |          |
|                                                      |                                               |          | 4.02                                                 | Physician density                                   | 119      |
|                                                      |                                               |          | 4.04                                                 | Access to improved drinking water                   | 111      |
|                                                      |                                               |          | 4.03                                                 | Access to improved sanitation                       | 107      |
|                                                      |                                               |          | 4.01                                                 | Gov't efforts to reduce health risks from pandemics | 74       |
|                                                      |                                               |          | <b>Prioritization of Travel &amp; Tourism</b>        |                                                     |          |
|                                                      |                                               |          | 5.04                                                 | T&T fair attendance                                 | 90       |
|                                                      |                                               |          | 5.03                                                 | Effectiveness of marketing and branding             | 82       |
|                                                      |                                               |          | <b>Air transport infrastructure</b>                  |                                                     |          |
|                                                      |                                               |          | 6.05                                                 | Number of operating airlines                        | 104      |
|                                                      |                                               |          | 6.03                                                 | Departures per 1,000 population                     | 96       |
|                                                      |                                               |          | 6.02                                                 | Available seat kilometers                           | 94       |
|                                                      |                                               |          | 6.01                                                 | Quality of air transport infrastructure             | 93       |
|                                                      |                                               |          | 6.06                                                 | International air transport network                 | 93       |
|                                                      |                                               |          | 6.04                                                 | Airport density                                     | 53       |
|                                                      |                                               |          | <b>Ground transport infrastructure</b>               |                                                     |          |
|                                                      |                                               |          | 7.01                                                 | Road infrastructure                                 | 117      |
|                                                      |                                               |          | 7.04                                                 | Domestic transport network                          | 109      |
|                                                      |                                               |          | 7.03                                                 | Port infrastructure                                 | 91       |
|                                                      |                                               |          | 7.02                                                 | Railroad infrastructure                             | 84       |
|                                                      |                                               |          | <b>Tourism infrastructure</b>                        |                                                     |          |
|                                                      |                                               |          | 8.01                                                 | Hotel rooms                                         | 108      |
|                                                      |                                               |          | 8.03                                                 | ATMs accepting Visa cards                           | 94       |
|                                                      |                                               |          | 8.02                                                 | Presence of major car rental companies              | 66       |
|                                                      |                                               |          | <b>ICT infrastructure</b>                            |                                                     |          |
|                                                      |                                               |          | 9.03                                                 | Telephone lines                                     | 119      |
|                                                      |                                               |          | 9.01                                                 | Extent of business Internet use                     | 114      |
|                                                      |                                               |          | 9.02                                                 | Internet users                                      | 111      |
|                                                      |                                               |          | <b>Price competitiveness in the T&amp;T industry</b> |                                                     |          |
|                                                      |                                               |          | 10.03                                                | Extent and effect of taxation                       | 96       |
|                                                      |                                               |          | 10.04                                                | Fuel price level                                    | 71       |

(Disadvantages cont'd. from bottom of right column)

| COMPETITIVE DISADVANTAGES             |                                                      | Rank/124 |
|---------------------------------------|------------------------------------------------------|----------|
| <b>Human resources</b>                |                                                      |          |
| 11.09                                 | Malaria incidence                                    | 122      |
| 11.02                                 | Secondary education enrollment                       | 120      |
| 11.07                                 | Ease of hiring foreign labor                         | 120      |
| 11.10                                 | Tuberculosis incidence                               | 118      |
| 11.08                                 | HIV prevalence                                       | 117      |
| 11.11                                 | Life expectancy                                      | 117      |
| 11.03                                 | Quality of the educational system                    | 113      |
| 11.04                                 | Local availability of research and training services | 111      |
| 11.06                                 | Hiring and firing practices                          | 107      |
| 11.01                                 | Primary education enrollment                         | 105      |
| 11.05                                 | Extent of staff training                             | 78       |
| <b>National tourism perception</b>    |                                                      |          |
| 12.03                                 | Recommendation to extend business trips              | 98       |
| 12.02                                 | Attitude toward tourists                             | 88       |
| <b>Natural and cultural resources</b> |                                                      |          |
| 13.05                                 | Risk of malaria and yellow fever                     | 103      |
| 13.04                                 | Business concern for ecosystems                      | 101      |
| 13.01                                 | Number of World Heritage sites                       | 87       |
| 13.03                                 | Nationally protected areas                           | 52       |

< < < (Cont'd. on bottom of left column)

# Namibia

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 2.0   |
| Surface area (1,000 square kilometers) .....              | 824.3 |
| Gross domestic product (US\$ billions), 2005 .....        | 6.1   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 7,478 |
| Real GDP growth (percent), 2005 .....                     | 3.5   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

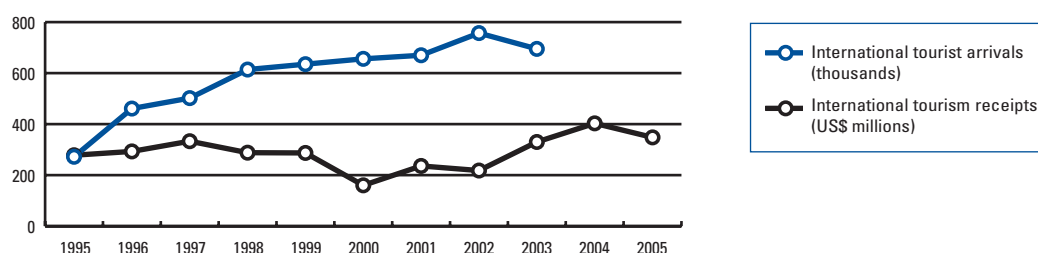
|                               |     | Percent<br>of total | 2007–2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-----|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 303 | 5.2                 | 5.3                                         |
| Employment (1,000 jobs) ..... | 32  | 5.4                 | 3.5                                         |

### T&T economy, 2006 estimates

|                               |     |      |     |
|-------------------------------|-----|------|-----|
| GDP (US\$ millions) .....     | 631 | 10.7 | 5.3 |
| Employment (1,000 jobs) ..... | 63  | 10.7 | 3.4 |

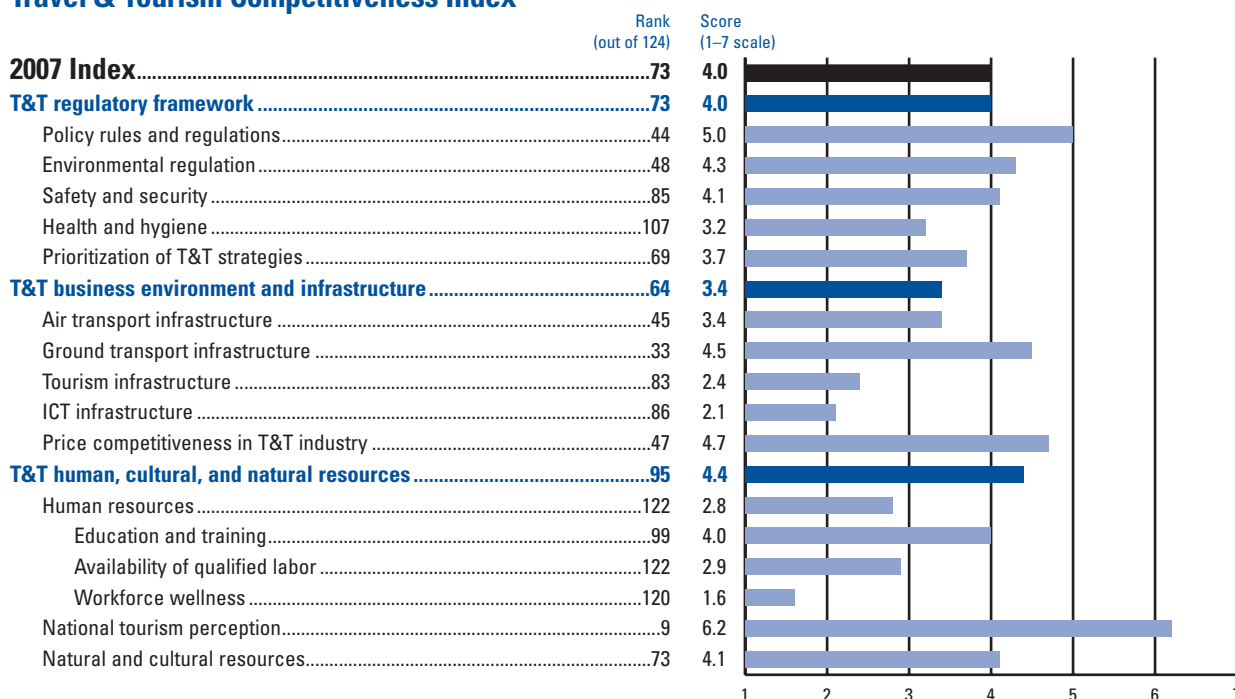
Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2003 .....         | 695 |
| International tourism receipts (US\$ millions), 2005 ..... | 348 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index



Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                          | Rank/124 | COMPETITIVE DISADVANTAGES                                           | Rank/124 |
|-----------------------------------------------------------------|----------|---------------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                             |          | <b>Policy rules and regulations</b>                                 |          |
| 1.04 Visa requirements .....15                                  |          | 1.03 Rules governing foreign direct investment .....83              |          |
| 1.02 Property rights .....31                                    |          | 1.01 Foreign ownership restrictions .....54                         |          |
| 1.05 Openness of bilateral Air Service Agreements .....49       |          |                                                                     |          |
| <b>Environmental regulation</b>                                 |          | <b>Environmental regulation</b>                                     |          |
| 2.02 Clarity and stability of environmental regulations .....42 |          | 2.03 Government prioritization of sustainable T&T .....58           |          |
|                                                                 |          | 2.01 Stringency of environmental regulation .....52                 |          |
| <b>Safety and security</b>                                      |          | <b>Safety and security</b>                                          |          |
| 3.01 Business costs of terrorism .....38                        |          | 3.02 Reliability of police services .....97                         |          |
|                                                                 |          | 3.03 Business costs of crime and violence .....84                   |          |
| <b>Prioritization of Travel &amp; Tourism</b>                   |          | <b>Health and hygiene</b>                                           |          |
| 5.03 Effectiveness of marketing and branding .....27            |          | 4.03 Access to improved sanitation .....104                         |          |
| 5.01 Government prioritization of the T&T industry .....46      |          | 4.01 Gov't efforts to reduce health risks from pandemics .....99    |          |
| 5.02 T&T government expenditure .....49                         |          | 4.02 Physician density .....99                                      |          |
|                                                                 |          | 4.04 Access to improved drinking water .....83                      |          |
| <b>Air transport infrastructure</b>                             |          | <b>Prioritization of Travel &amp; Tourism</b>                       |          |
| 6.04 Airport density .....5                                     |          | 5.04 T&T fair attendance .....105                                   |          |
| <b>Ground transport infrastructure</b>                          |          | <b>Air transport infrastructure</b>                                 |          |
| 7.03 Port infrastructure .....29                                |          | 6.05 Number of operating airlines .....114                          |          |
| 7.01 Road infrastructure .....35                                |          | 6.02 Available seat kilometers .....90                              |          |
| 7.02 Railroad infrastructure .....35                            |          | 6.06 International air transport network .....70                    |          |
|                                                                 |          | 6.03 Departures per 1,000 population .....58                        |          |
| <b>Price competitiveness in the T&amp;T industry</b>            |          | 6.01 Quality of air transport infrastructure .....51                |          |
| 10.03 Extent and effect of taxation .....42                     |          |                                                                     |          |
| 10.02 Purchasing power parity .....48                           |          | <b>Ground transport infrastructure</b>                              |          |
|                                                                 |          | 7.04 Domestic transport network .....67                             |          |
| <b>Human resources</b>                                          |          | <b>Tourism infrastructure</b>                                       |          |
| 11.01 Primary education enrollment .....1                       |          | 8.01 Hotel rooms .....75                                            |          |
|                                                                 |          | 8.03 ATMs accepting Visa cards .....69                              |          |
| <b>National tourism perception</b>                              |          | 8.02 Presence of major car rental companies .....66                 |          |
| 12.03 Recommendation to extend business trips .....15           |          |                                                                     |          |
| <b>Natural and cultural resources</b>                           |          | <b>ICT infrastructure</b>                                           |          |
| 13.03 Nationally protected areas .....29                        |          | 9.02 Internet users .....90                                         |          |
| 13.02 Carbon dioxide damage .....30                             |          | 9.03 Telephone lines .....90                                        |          |
| 13.04 Business concern for ecosystems .....33                   |          | 9.01 Extent of business Internet use .....73                        |          |
|                                                                 |          | <b>Price competitiveness in the T&amp;T industry</b>                |          |
|                                                                 |          | 10.01 Ticket taxes and airport charges .....90                      |          |
|                                                                 |          | 10.04 Fuel price level .....58                                      |          |
|                                                                 |          | <b>Human resources</b>                                              |          |
|                                                                 |          | 11.07 Ease of hiring foreign labor .....124                         |          |
|                                                                 |          | 11.08 HIV prevalence .....120                                       |          |
|                                                                 |          | 11.09 Malaria incidence .....120                                    |          |
|                                                                 |          | 11.04 Local availability of research and training services .....119 |          |
|                                                                 |          | 11.10 Tuberculosis incidence .....117                               |          |
|                                                                 |          | 11.03 Quality of the educational system .....108                    |          |
|                                                                 |          | 11.11 Life expectancy .....104                                      |          |
|                                                                 |          | 11.02 Secondary education enrollment .....95                        |          |
|                                                                 |          | 11.06 Hiring and firing practices .....93                           |          |
|                                                                 |          | 11.05 Extent of staff training .....64                              |          |
|                                                                 |          | <b>National tourism perception</b>                                  |          |
|                                                                 |          | 12.02 Attitude toward tourists .....80                              |          |
|                                                                 |          | <b>Natural and cultural resources</b>                               |          |
|                                                                 |          | 13.01 Number of World Heritage sites .....107                       |          |
|                                                                 |          | 13.05 Risk of malaria and yellow fever .....81                      |          |

# Nepal

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 27.1  |
| Surface area (1,000 square kilometers) .....              | 147.2 |
| Gross domestic product (US\$ billions), 2005 .....        | 7.5   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 1,675 |
| Real GDP growth (percent), 2005 .....                     | 2.7   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

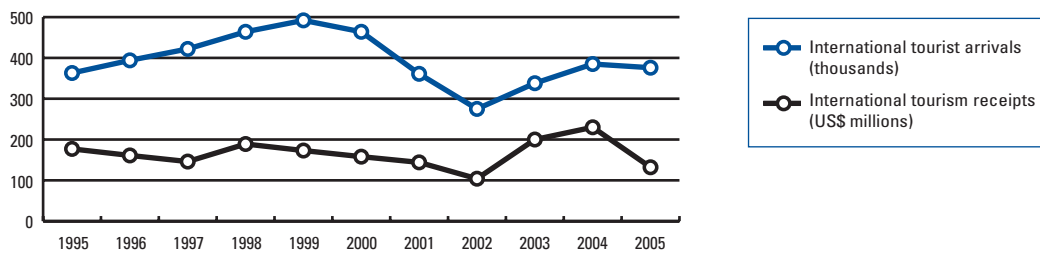
|                               |     | Percent<br>of total | 2007–2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-----|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 302 | 3.8                 | 5.0                                         |
| Employment (1,000 jobs) ..... | 330 | 2.9                 | 3.3                                         |

### T&T economy, 2006 estimates

|                               |     |     |     |
|-------------------------------|-----|-----|-----|
| GDP (US\$ millions) .....     | 648 | 8.2 | 5.1 |
| Employment (1,000 jobs) ..... | 726 | 6.4 | 3.4 |

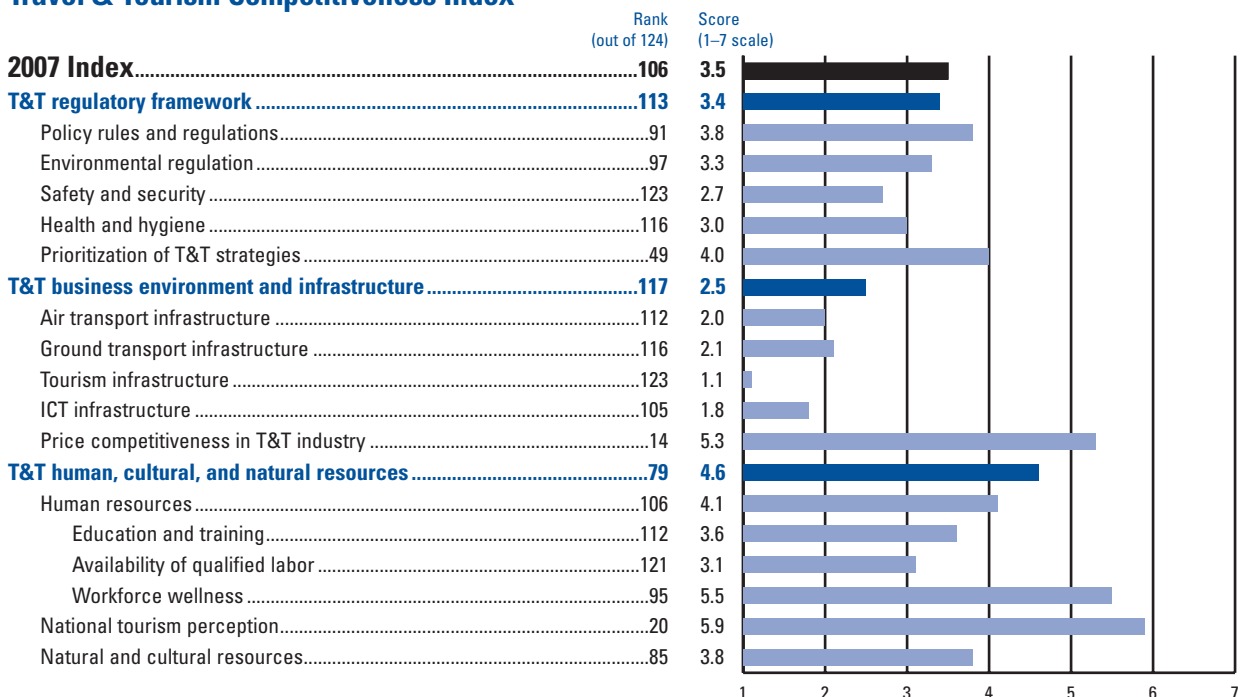
Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2005 .....         | 376 |
| International tourism receipts (US\$ millions), 2005 ..... | 132 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index



Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."



## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                    | Rank/124 | COMPETITIVE DISADVANTAGES                                          | Rank/124 |
|-----------------------------------------------------------|----------|--------------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                       |          | <b>Policy rules and regulations</b>                                |          |
| 1.04 Visa requirements .....43                            |          | 1.01 Foreign ownership restrictions.....122                        |          |
|                                                           |          | 1.05 Openness of bilateral Air Service Agreements .....117         |          |
| <b>Prioritization of Travel &amp; Tourism</b>             |          | 1.03 Rules governing foreign direct investment .....105            |          |
| 5.02 T&T government expenditure .....30                   |          | 1.02 Property rights.....78                                        |          |
| 5.01 Government prioritization of the T&T industry.....47 |          |                                                                    |          |
| 5.04 T&T fair attendance .....48                          |          | <b>Environmental regulation</b>                                    |          |
|                                                           |          | 2.01 Stringency of environmental regulation .....108               |          |
| <b>Price competitiveness in the T&amp;T industry</b>      |          | 2.02 Clarity and stability of environmental regulations .....99    |          |
| 10.02 Purchasing power parity .....7                      |          | 2.03 Government prioritization of sustainable T&T .....88          |          |
| 10.04 Fuel price level .....34                            |          |                                                                    |          |
| 10.01 Ticket taxes and airport charges.....43             |          | <b>Safety and security</b>                                         |          |
| 10.03 Extent and effect of taxation.....45                |          | 3.01 Business costs of terrorism .....124                          |          |
|                                                           |          | 3.02 Reliability of police services .....101                       |          |
| <b>Human resources</b>                                    |          | 3.03 Business costs of crime and violence.....89                   |          |
| 11.01 Primary education enrollment .....1                 |          |                                                                    |          |
|                                                           |          | <b>Health and hygiene</b>                                          |          |
| <b>National tourism perception</b>                        |          | 4.01 Gov't efforts to reduce health risks from pandemics .....119  |          |
| 12.02 Attitude toward tourists .....49                    |          | 4.03 Access to improved sanitation .....107                        |          |
|                                                           |          | 4.02 Physician density .....103                                    |          |
| <b>Natural and cultural resources</b>                     |          | 4.04 Access to improved drinking water .....73                     |          |
| 13.03 Nationally protected areas.....50                   |          |                                                                    |          |
|                                                           |          | <b>Prioritization of Travel &amp; Tourism</b>                      |          |
|                                                           |          | 5.03 Effectiveness of marketing and branding .....72               |          |
|                                                           |          |                                                                    |          |
|                                                           |          | <b>Air transport infrastructure</b>                                |          |
|                                                           |          | 6.04 Airport density .....104                                      |          |
|                                                           |          | 6.06 International air transport network .....101                  |          |
|                                                           |          | 6.01 Quality of air transport infrastructure .....98               |          |
|                                                           |          | 6.03 Departures per 1,000 population.....90                        |          |
|                                                           |          | 6.05 Number of operating airlines.....87                           |          |
|                                                           |          | 6.02 Available seat kilometers.....84                              |          |
|                                                           |          |                                                                    |          |
|                                                           |          | <b>Ground transport infrastructure</b>                             |          |
|                                                           |          | 7.03 Port infrastructure .....122                                  |          |
|                                                           |          | 7.02 Railroad infrastructure .....119                              |          |
|                                                           |          | 7.01 Road infrastructure .....100                                  |          |
|                                                           |          | 7.04 Domestic transport network .....99                            |          |
|                                                           |          |                                                                    |          |
|                                                           |          | <b>Tourism infrastructure</b>                                      |          |
|                                                           |          | 8.02 Presence of major car rental companies.....121                |          |
|                                                           |          | 8.03 ATMs accepting Visa cards .....102                            |          |
|                                                           |          | 8.01 Hotel rooms.....96                                            |          |
|                                                           |          |                                                                    |          |
|                                                           |          | <b>ICT infrastructure</b>                                          |          |
|                                                           |          | 9.02 Internet users .....113                                       |          |
|                                                           |          | 9.03 Telephone lines.....105                                       |          |
|                                                           |          | 9.01 Extent of business Internet use .....85                       |          |
|                                                           |          |                                                                    |          |
|                                                           |          | <b>Human resources</b>                                             |          |
|                                                           |          | 11.07 Ease of hiring foreign labor .....122                        |          |
|                                                           |          | 11.05 Extent of staff training.....118                             |          |
|                                                           |          | 11.04 Local availability of research and training services.....114 |          |
|                                                           |          | 11.02 Secondary education enrollment.....104                       |          |
|                                                           |          | 11.03 Quality of the educational system .....101                   |          |
|                                                           |          | 11.11 Life expectancy .....99                                      |          |
|                                                           |          | 11.06 Hiring and firing practices.....95                           |          |
|                                                           |          | 11.10 Tuberculosis incidence .....95                               |          |
|                                                           |          | 11.09 Malaria incidence.....81                                     |          |
|                                                           |          | 11.08 HIV prevalence .....74                                       |          |
|                                                           |          |                                                                    |          |
|                                                           |          | <b>National tourism perception</b>                                 |          |
|                                                           |          | 12.03 Recommendation to extend business trips .....74              |          |
|                                                           |          |                                                                    |          |
|                                                           |          | <b>Natural and cultural resources</b>                              |          |
|                                                           |          | 13.05 Risk of malaria and yellow fever .....95                     |          |
|                                                           |          | 13.04 Business concern for ecosystems .....93                      |          |
|                                                           |          | 13.01 Number of World Heritage sites .....55                       |          |
|                                                           |          | 13.02 Carbon dioxide damage.....53                                 |          |

# Netherlands

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 16.3   |
| Surface area (1,000 square kilometers) .....              | 41.5   |
| Gross domestic product (US\$ billions), 2005 .....        | 629.9  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 30,862 |
| Real GDP growth (percent), 2005 .....                     | 1.5    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

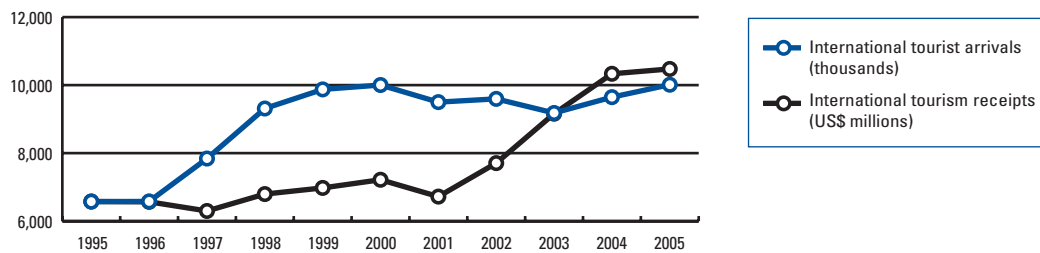
|                               |        | Percent of total | 2007–2016 annual growth (% forecast) |
|-------------------------------|--------|------------------|--------------------------------------|
| GDP (US\$ millions) .....     | 20,232 | 3.1              | 1.9                                  |
| Employment (1,000 jobs) ..... | 218    | 3.1              | 0.2                                  |

### T&T economy, 2006 estimates

|                               |        |     |     |
|-------------------------------|--------|-----|-----|
| GDP (US\$ millions) .....     | 54,663 | 8.5 | 2.1 |
| Employment (1,000 jobs) ..... | 571    | 8.2 | 0.3 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |        |
|------------------------------------------------------------|--------|
| International tourist arrivals (1,000), 2005 .....         | 10,012 |
| International tourism receipts (US\$ millions), 2005 ..... | 10,475 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank (out of 124) | Score (1–7 scale) |
|--------------------------------------------------------------|-------------------|-------------------|
| <b>2007 Index</b> .....                                      | <b>19</b>         | <b>5.1</b>        |
| <b>T&amp;T regulatory framework</b> .....                    | <b>22</b>         | <b>5.2</b>        |
| Policy rules and regulations .....                           | 12                | 5.5               |
| Environmental regulation .....                               | 10                | 5.7               |
| Safety and security .....                                    | 27                | 5.3               |
| Health and hygiene .....                                     | 15                | 6.2               |
| Prioritization of T&T strategies .....                       | 91                | 3.2               |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>15</b>         | <b>4.8</b>        |
| Air transport infrastructure .....                           | 14                | 4.8               |
| Ground transport infrastructure .....                        | 8                 | 6.2               |
| Tourism infrastructure .....                                 | 32                | 4.2               |
| ICT infrastructure .....                                     | 12                | 5.4               |
| Price competitiveness in T&T industry .....                  | 119               | 3.3               |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>25</b>         | <b>5.3</b>        |
| Human resources .....                                        | 21                | 5.6               |
| Education and training .....                                 | 6                 | 6.1               |
| Availability of qualified labor .....                        | 104               | 3.7               |
| Workforce wellness .....                                     | 15                | 6.9               |
| National tourism perception .....                            | 82                | 4.6               |
| Natural and cultural resources .....                         | 13                | 5.7               |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                          | Rank/124 | COMPETITIVE DISADVANTAGES                               | Rank/124 |
|-----------------------------------------------------------------|----------|---------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                             |          | <b>Policy rules and regulations</b>                     |          |
| 1.02 Property rights.....                                       | 5        | 1.04 Visa requirements .....                            | 43       |
| 1.03 Rules governing foreign direct investment .....            | 17       | 1.01 Foreign ownership restrictions.....                | 24       |
| <b>Environmental regulation</b>                                 |          | 1.05 Openness of bilateral Air Service Agreements ..... | 19       |
| 2.01 Stringency of environmental regulation .....               | 8        | <b>Environmental regulation</b>                         |          |
| 2.02 Clarity and stability of environmental regulations .....   | 12       | 2.03 Government prioritization of sustainable T&T ..... | 30       |
| <b>Safety and security</b>                                      |          | <b>Safety and security</b>                              |          |
| 3.02 Reliability of police services .....                       | 13       | 3.01 Business costs of terrorism .....                  | 83       |
| <b>Health and hygiene</b>                                       |          | 3.03 Business costs of crime and violence.....          | 35       |
| 4.03 Access to improved sanitation .....                        | 1        | <b>Health and hygiene</b>                               |          |
| 4.04 Access to improved drinking water .....                    | 1        | 4.02 Physician density .....                            | 27       |
| 4.01 Gov't efforts to reduce health risks from pandemics .....  | 17       | <b>Prioritization of Travel &amp; Tourism</b>           |          |
| <b>Air transport infrastructure</b>                             |          | 5.04 T&T fair attendance .....                          | 90       |
| 6.06 International air transport network .....                  | 3        | 5.02 T&T government expenditure .....                   | 82       |
| 6.01 Quality of air transport infrastructure .....              | 4        | 5.01 Government prioritization of the T&T industry..... | 79       |
| 6.05 Number of operating airlines .....                         | 9        | 5.03 Effectiveness of marketing and branding .....      | 52       |
| 6.02 Available seat kilometers.....                             | 17       | <b>Air transport infrastructure</b>                     |          |
| <b>Ground transport infrastructure</b>                          |          | 6.04 Airport density .....                              | 108      |
| 7.03 Port infrastructure .....                                  | 2        | 6.03 Departures per 1,000 population.....               | 22       |
| 7.02 Railroad infrastructure .....                              | 6        | <b>Tourism infrastructure</b>                           |          |
| 7.04 Domestic transport network .....                           | 8        | 8.01 Hotel rooms.....                                   | 43       |
| 7.01 Road infrastructure.....                                   | 11       | 8.02 Presence of major car rental companies.....        | 35       |
| <b>ICT infrastructure</b>                                       |          | 8.03 ATMs accepting Visa cards .....                    | 25       |
| 9.01 Extent of business Internet use .....                      | 5        | <b>ICT infrastructure</b>                               |          |
| 9.02 Internet users .....                                       | 10       | 9.03 Telephone lines.....                               | 20       |
| <b>Human resources</b>                                          |          | <b>Price competitiveness in the T&amp;T industry</b>    |          |
| 11.01 Primary education enrollment .....                        | 1        | 10.02 Purchasing power parity.....                      | 115      |
| 11.02 Secondary education enrollment.....                       | 1        | 10.04 Fuel price level .....                            | 113      |
| 11.09 Malaria incidence.....                                    | 1        | 10.01 Ticket taxes and airport charges.....             | 93       |
| 11.05 Extent of staff training.....                             | 6        | 10.03 Extent and effect of taxation.....                | 39       |
| 11.04 Local availability of research and training services..... | 7        | <b>Human resources</b>                                  |          |
| 11.10 Tuberculosis incidence .....                              | 13       | 11.06 Hiring and firing practices.....                  | 106      |
| 11.11 Life expectancy .....                                     | 15       | 11.07 Ease of hiring foreign labor .....                | 81       |
| 11.03 Quality of the educational system .....                   | 18       | 11.08 HIV prevalence .....                              | 48       |
| <b>Natural and cultural resources</b>                           |          | <b>National tourism perception</b>                      |          |
| 13.05 Risk of malaria and yellow fever .....                    | 1        | 12.03 Recommendation to extend business trips .....     | 95       |
| 13.04 Business concern for ecosystems .....                     | 10       | 12.01 Tourism openness .....                            | 53       |
| 13.02 Carbon dioxide damage.....                                | 12       | 12.02 Attitude toward tourists .....                    | 53       |
|                                                                 |          | <b>Natural and cultural resources</b>                   |          |
|                                                                 |          | 13.01 Number of World Heritage sites .....              | 30       |
|                                                                 |          | 13.03 Nationally protected areas.....                   | 27       |

# New Zealand

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 4.1    |
| Surface area (1,000 square kilometers) .....              | 270.5  |
| Gross domestic product (US\$ billions), 2005 .....        | 108.5  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 24,797 |
| Real GDP growth (percent), 2005 .....                     | 2.3    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

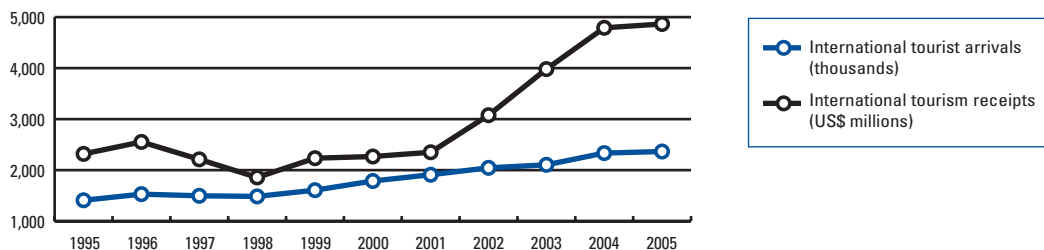
|                               |       | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 8,097 | 7.4                 | 3.4                                         |
| Employment (1,000 jobs) ..... | 157   | 7.7                 | 0.5                                         |

### T&T economy, 2006 estimates

|                               |        |      |     |
|-------------------------------|--------|------|-----|
| GDP (US\$ millions) .....     | 16,793 | 15.4 | 3.0 |
| Employment (1,000 jobs) ..... | 326    | 15.9 | 0.2 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 2,365 |
| International tourism receipts (US\$ millions), 2005 ..... | 4,865 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>14</b>            | <b>5.2</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>10</b>            | <b>5.4</b>           |
| Policy rules and regulations .....                           | 19                   | 5.4                  |
| Environmental regulation .....                               | 8                    | 5.8                  |
| Safety and security .....                                    | 12                   | 5.7                  |
| Health and hygiene .....                                     | 23                   | 5.9                  |
| Prioritization of T&T strategies .....                       | 36                   | 4.4                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>20</b>            | <b>4.6</b>           |
| Air transport infrastructure .....                           | 15                   | 4.7                  |
| Ground transport infrastructure .....                        | 25                   | 4.8                  |
| Tourism infrastructure .....                                 | 35                   | 4.1                  |
| ICT infrastructure .....                                     | 20                   | 4.8                  |
| Price competitiveness in T&T industry .....                  | 75                   | 4.4                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>7</b>             | <b>5.6</b>           |
| Human resources .....                                        | 20                   | 5.6                  |
| Education and training .....                                 | 22                   | 5.7                  |
| Availability of qualified labor .....                        | 72                   | 4.2                  |
| Workforce wellness .....                                     | 7                    | 6.9                  |
| National tourism perception .....                            | 38                   | 5.3                  |
| Natural and cultural resources .....                         | 10                   | 5.9                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                   | Rank/124 | COMPETITIVE DISADVANTAGES                                        | Rank/124 |
|----------------------------------------------------------|----------|------------------------------------------------------------------|----------|
| <b>Environmental regulation</b>                          |          | <b>Policy rules and regulations</b>                              |          |
| 2.03 Government prioritization of sustainable T&T .....  | 2        | 1.04 Visa requirements .....                                     | 43       |
| 2.01 Stringency of environmental regulation .....        | 9        | 1.03 Rules governing foreign direct investment .....             | 40       |
|                                                          |          | 1.05 Openness of bilateral Air Service Agreements .....          | 25       |
| <b>Health and hygiene</b>                                |          | 1.02 Property rights .....                                       | 17       |
| 4.03 Access to improved sanitation .....                 | 1        | 1.01 Foreign ownership restrictions .....                        | 14       |
| 4.04 Access to improved drinking water .....             | 1        |                                                                  |          |
|                                                          |          | <b>Environmental regulation</b>                                  |          |
| <b>Prioritization of Travel &amp; Tourism</b>            |          | 2.02 Clarity and stability of environmental regulations .....    | 15       |
| 5.03 Effectiveness of marketing and branding .....       | 2        |                                                                  |          |
| 5.01 Government prioritization of the T&T industry ..... | 12       | <b>Safety and security</b>                                       |          |
|                                                          |          | 3.02 Reliability of police services .....                        | 23       |
| <b>Air transport infrastructure</b>                      |          | 3.03 Business costs of crime and violence .....                  | 17       |
| 6.03 Departures per 1,000 population .....               | 3        | 3.01 Business costs of terrorism .....                           | 16       |
|                                                          |          |                                                                  |          |
| <b>Human resources</b>                                   |          | <b>Health and hygiene</b>                                        |          |
| 11.01 Primary education enrollment .....                 | 1        | 4.02 Physician density .....                                     | 42       |
| 11.02 Secondary education enrollment .....               | 1        | 4.01 Gov't efforts to reduce health risks from pandemics .....   | 16       |
| 11.09 Malaria incidence .....                            | 1        |                                                                  |          |
| 11.11 Life expectancy .....                              | 8        | <b>Prioritization of Travel &amp; Tourism</b>                    |          |
|                                                          |          | 5.04 T&T fair attendance .....                                   | 70       |
| <b>National tourism perception</b>                       |          | 5.02 T&T government expenditure .....                            | 54       |
| 12.02 Attitude toward tourists .....                     | 2        |                                                                  |          |
|                                                          |          | <b>Air transport infrastructure</b>                              |          |
| <b>Natural and cultural resources</b>                    |          | 6.05 Number of operating airlines .....                          | 59       |
| 13.05 Risk of malaria and yellow fever .....             | 1        | 6.01 Quality of air transport infrastructure .....               | 28       |
| 13.04 Business concern for ecosystems .....              | 7        | 6.02 Available seat kilometers .....                             | 25       |
| 13.03 Nationally protected areas .....                   | 9        | 6.06 International air transport network .....                   | 19       |
|                                                          |          | 6.04 Airport density .....                                       | 16       |
|                                                          |          |                                                                  |          |
|                                                          |          | <b>Ground transport infrastructure</b>                           |          |
|                                                          |          | 7.01 Road infrastructure .....                                   | 41       |
|                                                          |          | 7.02 Railroad infrastructure .....                               | 37       |
|                                                          |          | 7.04 Domestic transport network .....                            | 24       |
|                                                          |          | 7.03 Port infrastructure .....                                   | 18       |
|                                                          |          |                                                                  |          |
|                                                          |          | <b>Tourism infrastructure</b>                                    |          |
|                                                          |          | 8.01 Hotel rooms .....                                           | 46       |
|                                                          |          | 8.02 Presence of major car rental companies .....                | 35       |
|                                                          |          | 8.03 ATMs accepting Visa cards .....                             | 24       |
|                                                          |          |                                                                  |          |
|                                                          |          | <b>ICT infrastructure</b>                                        |          |
|                                                          |          | 9.03 Telephone lines .....                                       | 24       |
|                                                          |          | 9.01 Extent of business Internet use .....                       | 22       |
|                                                          |          | 9.02 Internet users .....                                        | 15       |
|                                                          |          |                                                                  |          |
|                                                          |          | <b>Price competitiveness in the T&amp;T industry</b>             |          |
|                                                          |          | 10.02 Purchasing power parity .....                              | 104      |
|                                                          |          | 10.01 Ticket taxes and airport charges .....                     | 63       |
|                                                          |          | 10.03 Extent and effect of taxation .....                        | 61       |
|                                                          |          | 10.04 Fuel price level .....                                     | 23       |
|                                                          |          |                                                                  |          |
|                                                          |          | <b>Human resources</b>                                           |          |
|                                                          |          | 11.06 Hiring and firing practices .....                          | 79       |
|                                                          |          | 11.07 Ease of hiring foreign labor .....                         | 68       |
|                                                          |          | 11.04 Local availability of research and training services ..... | 25       |
|                                                          |          | 11.05 Extent of staff training .....                             | 25       |
|                                                          |          | 11.08 HIV prevalence .....                                       | 25       |
|                                                          |          | 11.10 Tuberculosis incidence .....                               | 24       |
|                                                          |          | 11.03 Quality of the educational system .....                    | 21       |
|                                                          |          |                                                                  |          |
|                                                          |          | <b>National tourism perception</b>                               |          |
|                                                          |          | 12.01 Tourism openness .....                                     | 33       |
|                                                          |          | 12.03 Recommendation to extend business trips .....              | 24       |
|                                                          |          |                                                                  |          |
|                                                          |          | <b>Natural and cultural resources</b>                            |          |
|                                                          |          | 13.01 Number of World Heritage sites .....                       | 60       |
|                                                          |          | 13.02 Carbon dioxide damage .....                                | 32       |

# Nicaragua

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 5.5   |
| Surface area (1,000 square kilometers) .....              | 130.0 |
| Gross domestic product (US\$ billions), 2005 .....        | 4.9   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 3,636 |
| Real GDP growth (percent), 2005 .....                     | 4.0   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

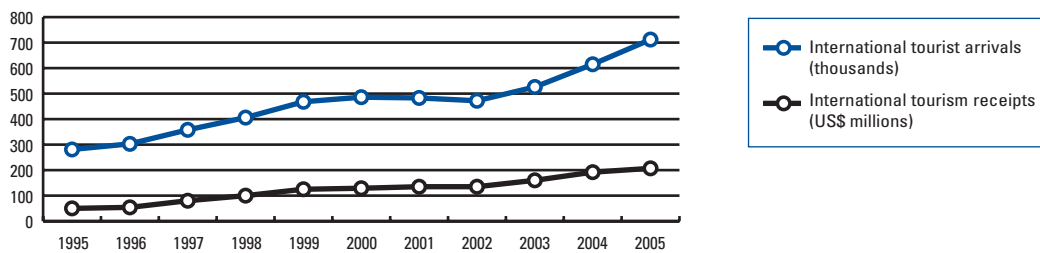
|                               |     | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-----|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 152 | 2.9                 | 4.9                                         |
| Employment (1,000 jobs) ..... | 48  | 2.3                 | 5.2                                         |

### T&T economy, 2006 estimates

|                               |     |     |     |
|-------------------------------|-----|-----|-----|
| GDP (US\$ millions) .....     | 388 | 7.4 | 4.9 |
| Employment (1,000 jobs) ..... | 124 | 5.9 | 5.1 |

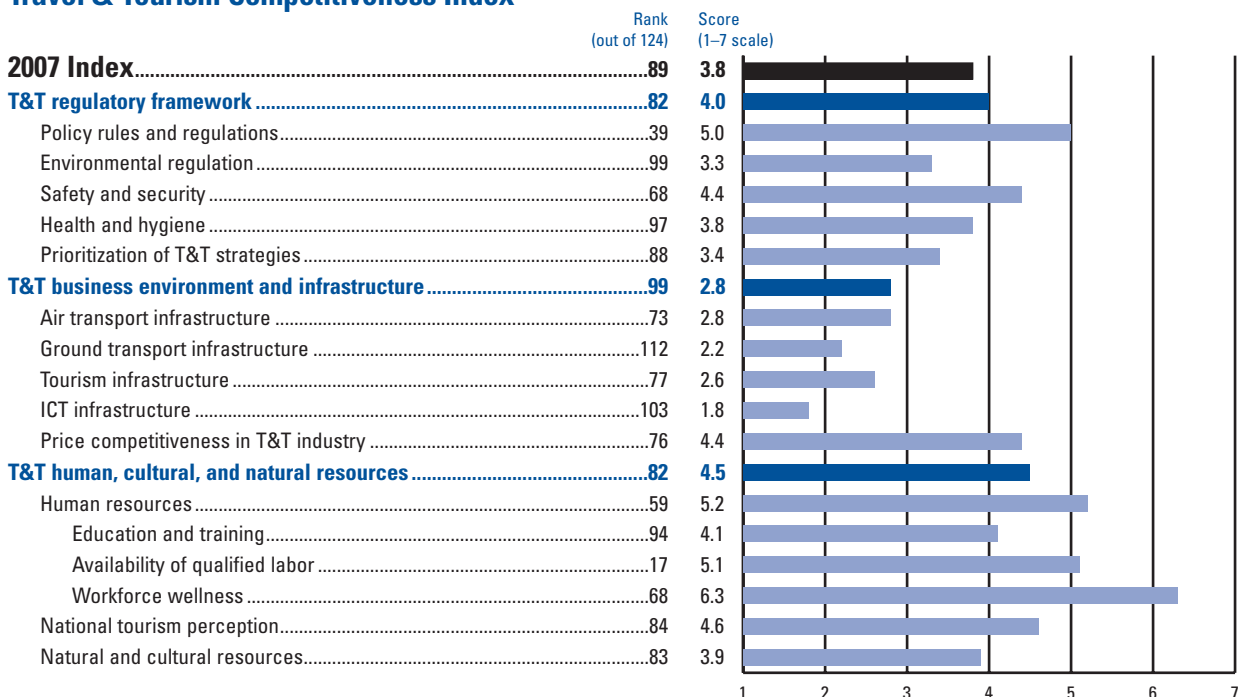
Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2005 .....         | 712 |
| International tourism receipts (US\$ millions), 2005 ..... | 207 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index



Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               |                                                    | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                            | Rank/124 |
|------------------------------------------------------|----------------------------------------------------|----------|------------------------------------------------------|------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                  |                                                    |          | <b>Policy rules and regulations</b>                  |                                                            |          |
| 1.05                                                 | Openness of bilateral Air Service Agreements ..... | 5        | 1.02                                                 | Property rights .....                                      | 109      |
| 1.04                                                 | Visa requirements .....                            | 15       | 1.01                                                 | Foreign ownership restrictions .....                       | 83       |
| <b>Air transport infrastructure</b>                  |                                                    |          | 1.03                                                 | Rules governing foreign direct investment .....            | 76       |
| 6.04                                                 | Airport density .....                              | 15       | <b>Environmental regulation</b>                      |                                                            |          |
| <b>Price competitiveness in the T&amp;T industry</b> |                                                    |          | 2.01                                                 | Stringency of environmental regulation .....               | 110      |
| 10.02                                                | Purchasing power parity .....                      | 16       | 2.02                                                 | Clarity and stability of environmental regulations .....   | 108      |
| <b>Human resources</b>                               |                                                    |          | 2.03                                                 | Government prioritization of sustainable T&T .....         | 85       |
| 11.01                                                | Primary education enrollment .....                 | 1        | <b>Safety and security</b>                           |                                                            |          |
| 11.07                                                | Ease of hiring foreign labor .....                 | 7        | 3.03                                                 | Business costs of crime and violence .....                 | 78       |
| 11.06                                                | Hiring and firing practices .....                  | 38       | 3.01                                                 | Business costs of terrorism .....                          | 72       |
| 11.08                                                | HIV prevalence .....                               | 48       | 3.02                                                 | Reliability of police services .....                       | 58       |
| <b>National tourism perception</b>                   |                                                    |          | <b>Health and hygiene</b>                            |                                                            |          |
| 12.02                                                | Attitude toward tourists .....                     | 48       | 4.01                                                 | Gov't efforts to reduce health risks from pandemics .....  | 111      |
| <b>Natural and cultural resources</b>                |                                                    |          | 4.02                                                 | Physician density .....                                    | 97       |
| 13.03                                                | Nationally protected areas .....                   | 22       | 4.04                                                 | Access to improved drinking water .....                    | 81       |
|                                                      |                                                    |          | 4.03                                                 | Access to improved sanitation .....                        | 71       |
|                                                      |                                                    |          | <b>Prioritization of Travel &amp; Tourism</b>        |                                                            |          |
|                                                      |                                                    |          | 5.04                                                 | T&T fair attendance .....                                  | 90       |
|                                                      |                                                    |          | 5.02                                                 | T&T government expenditure .....                           | 85       |
|                                                      |                                                    |          | 5.01                                                 | Government prioritization of the T&T industry .....        | 57       |
|                                                      |                                                    |          | 5.03                                                 | Effectiveness of marketing and branding .....              | 53       |
|                                                      |                                                    |          | <b>Air transport infrastructure</b>                  |                                                            |          |
|                                                      |                                                    |          | 6.03                                                 | Departures per 1,000 population .....                      | 109      |
|                                                      |                                                    |          | 6.05                                                 | Number of operating airlines .....                         | 107      |
|                                                      |                                                    |          | 6.02                                                 | Available seat kilometers .....                            | 102      |
|                                                      |                                                    |          | 6.01                                                 | Quality of air transport infrastructure .....              | 81       |
|                                                      |                                                    |          | 6.06                                                 | International air transport network .....                  | 79       |
|                                                      |                                                    |          | <b>Ground transport infrastructure</b>               |                                                            |          |
|                                                      |                                                    |          | 7.02                                                 | Railroad infrastructure .....                              | 122      |
|                                                      |                                                    |          | 7.04                                                 | Domestic transport network .....                           | 115      |
|                                                      |                                                    |          | 7.03                                                 | Port infrastructure .....                                  | 100      |
|                                                      |                                                    |          | 7.01                                                 | Road infrastructure .....                                  | 92       |
|                                                      |                                                    |          | <b>Tourism infrastructure</b>                        |                                                            |          |
|                                                      |                                                    |          | 8.01                                                 | Hotel rooms .....                                          | 90       |
|                                                      |                                                    |          | 8.03                                                 | ATMs accepting Visa cards .....                            | 82       |
|                                                      |                                                    |          | 8.02                                                 | Presence of major car rental companies .....               | 55       |
|                                                      |                                                    |          | <b>ICT infrastructure</b>                            |                                                            |          |
|                                                      |                                                    |          | 9.02                                                 | Internet users .....                                       | 101      |
|                                                      |                                                    |          | 9.03                                                 | Telephone lines .....                                      | 99       |
|                                                      |                                                    |          | 9.01                                                 | Extent of business Internet use .....                      | 96       |
|                                                      |                                                    |          | <b>Price competitiveness in the T&amp;T industry</b> |                                                            |          |
|                                                      |                                                    |          | 10.01                                                | Ticket taxes and airport charges .....                     | 110      |
|                                                      |                                                    |          | 10.03                                                | Extent and effect of taxation .....                        | 110      |
|                                                      |                                                    |          | 10.04                                                | Fuel price level .....                                     | 56       |
|                                                      |                                                    |          | <b>Human resources</b>                               |                                                            |          |
|                                                      |                                                    |          | 11.05                                                | Extent of staff training .....                             | 105      |
|                                                      |                                                    |          | 11.03                                                | Quality of the educational system .....                    | 103      |
|                                                      |                                                    |          | 11.02                                                | Secondary education enrollment .....                       | 92       |
|                                                      |                                                    |          | 11.09                                                | Malaria incidence .....                                    | 90       |
|                                                      |                                                    |          | 11.04                                                | Local availability of research and training services ..... | 81       |
|                                                      |                                                    |          | 11.11                                                | Life expectancy .....                                      | 78       |
|                                                      |                                                    |          | 11.10                                                | Tuberculosis incidence .....                               | 66       |

(Disadvantages cont'd. from bottom of right column)

<<< (Cont'd. on bottom of left column)

# Nigeria

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 131.5 |
| Surface area (1,000 square kilometers) .....              | 923.8 |
| Gross domestic product (US\$ billions), 2005 .....        | 99.1  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 1,188 |
| Real GDP growth (percent), 2005 .....                     | 6.9   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

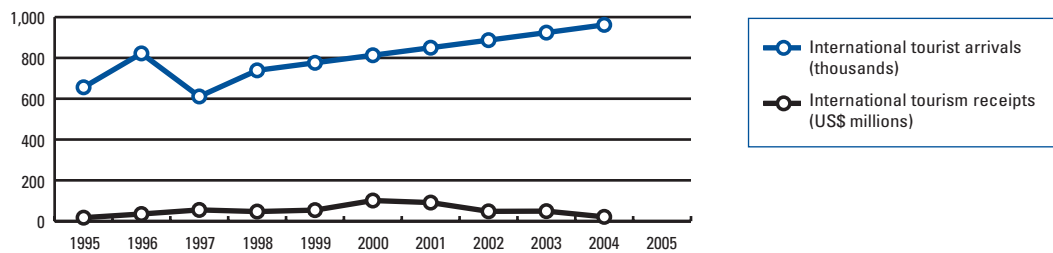
|                               |     | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-----|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 708 | 0.8                 | 5.3                                         |
| Employment (1,000 jobs) ..... | 232 | 0.7                 | 3.4                                         |

### T&T economy, 2006 estimates

|                               |       |     |     |
|-------------------------------|-------|-----|-----|
| GDP (US\$ millions) .....     | 5,816 | 6.6 | 4.2 |
| Employment (1,000 jobs) ..... | 1,855 | 5.5 | 2.4 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2004 .....         | 962 |
| International tourism receipts (US\$ millions), 2004 ..... | 21  |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>115</b>           | <b>3.3</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>118</b>           | <b>3.3</b>           |
| Policy rules and regulations .....                           | 109                  | 3.5                  |
| Environmental regulation .....                               | 78                   | 3.7                  |
| Safety and security .....                                    | 117                  | 3.1                  |
| Health and hygiene .....                                     | 108                  | 3.2                  |
| Prioritization of T&T strategies .....                       | 101                  | 3.1                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>102</b>           | <b>2.7</b>           |
| Air transport infrastructure .....                           | 104                  | 2.2                  |
| Ground transport infrastructure .....                        | 88                   | 2.8                  |
| Tourism infrastructure .....                                 | 107                  | 1.9                  |
| ICT infrastructure .....                                     | 102                  | 1.8                  |
| Price competitiveness in T&T industry .....                  | 35                   | 4.9                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>119</b>           | <b>3.9</b>           |
| Human resources .....                                        | 102                  | 4.2                  |
| Education and training .....                                 | 96                   | 4.1                  |
| Availability of qualified labor .....                        | 18                   | 5.1                  |
| Workforce wellness .....                                     | 109                  | 3.4                  |
| National tourism perception .....                            | 110                  | 4.1                  |
| Natural and cultural resources .....                         | 107                  | 3.2                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."



## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               |                                    | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                           | Rank/124 |
|------------------------------------------------------|------------------------------------|----------|------------------------------------------------------|-----------------------------------------------------------|----------|
| <b>Price competitiveness in the T&amp;T industry</b> |                                    |          | <b>Policy rules and regulations</b>                  |                                                           |          |
| 10.03                                                | Extent and effect of taxation..... | 23       | 1.04                                                 | Visa requirements .....                                   | 113      |
| 10.04                                                | Fuel price level .....             | 30       | 1.05                                                 | Openness of bilateral Air Service Agreements .....        | 91       |
| <b>Human resources</b>                               |                                    |          | 1.02                                                 | Property rights.....                                      | 88       |
| 11.06                                                | Hiring and firing practices.....   | 19       | 1.01                                                 | Foreign ownership restrictions.....                       | 65       |
| 11.07                                                | Ease of hiring foreign labor ..... | 34       | 1.03                                                 | Rules governing foreign direct investment .....           | 54       |
|                                                      |                                    |          | <b>Environmental regulation</b>                      |                                                           |          |
|                                                      |                                    |          | 2.01                                                 | Stringency of environmental regulation .....              | 94       |
|                                                      |                                    |          | 2.02                                                 | Clarity and stability of environmental regulations .....  | 84       |
|                                                      |                                    |          | 2.03                                                 | Government prioritization of sustainable T&T .....        | 53       |
|                                                      |                                    |          | <b>Safety and security</b>                           |                                                           |          |
|                                                      |                                    |          | 3.01                                                 | Business costs of terrorism .....                         | 115      |
|                                                      |                                    |          | 3.02                                                 | Reliability of police services .....                      | 115      |
|                                                      |                                    |          | 3.03                                                 | Business costs of crime and violence.....                 | 106      |
|                                                      |                                    |          | <b>Health and hygiene</b>                            |                                                           |          |
|                                                      |                                    |          | 4.02                                                 | Physician density.....                                    | 101      |
|                                                      |                                    |          | 4.04                                                 | Access to improved drinking water .....                   | 101      |
|                                                      |                                    |          | 4.03                                                 | Access to improved sanitation .....                       | 99       |
|                                                      |                                    |          | 4.01                                                 | Gov't efforts to reduce health risks from pandemics ..... | 54       |
|                                                      |                                    |          | <b>Prioritization of Travel &amp; Tourism</b>        |                                                           |          |
|                                                      |                                    |          | 5.02                                                 | T&T government expenditure .....                          | 112      |
|                                                      |                                    |          | 5.01                                                 | Government prioritization of the T&T industry .....       | 75       |
|                                                      |                                    |          | 5.04                                                 | T&T fair attendance.....                                  | 70       |
|                                                      |                                    |          | 5.03                                                 | Effectiveness of marketing and branding .....             | 63       |
|                                                      |                                    |          | <b>Air transport infrastructure</b>                  |                                                           |          |
|                                                      |                                    |          | 6.04                                                 | Airport density .....                                     | 120      |
|                                                      |                                    |          | 6.03                                                 | Departures per 1,000 population.....                      | 111      |
|                                                      |                                    |          | 6.01                                                 | Quality of air transport infrastructure .....             | 94       |
|                                                      |                                    |          | 6.06                                                 | International air transport network .....                 | 91       |
|                                                      |                                    |          | 6.05                                                 | Number of operating airlines.....                         | 64       |
|                                                      |                                    |          | 6.02                                                 | Available seat kilometers.....                            | 57       |
|                                                      |                                    |          | <b>Ground transport infrastructure</b>               |                                                           |          |
|                                                      |                                    |          | 7.01                                                 | Road infrastructure.....                                  | 94       |
|                                                      |                                    |          | 7.03                                                 | Port infrastructure .....                                 | 83       |
|                                                      |                                    |          | 7.02                                                 | Railroad infrastructure .....                             | 82       |
|                                                      |                                    |          | 7.04                                                 | Domestic transport network .....                          | 78       |
|                                                      |                                    |          | <b>Tourism infrastructure</b>                        |                                                           |          |
|                                                      |                                    |          | 8.03                                                 | ATMs accepting Visa cards .....                           | 114      |
|                                                      |                                    |          | 8.01                                                 | Hotel rooms.....                                          | 111      |
|                                                      |                                    |          | 8.02                                                 | Presence of major car rental companies.....               | 92       |
|                                                      |                                    |          | <b>ICT infrastructure</b>                            |                                                           |          |
|                                                      |                                    |          | 9.03                                                 | Telephone lines.....                                      | 110      |
|                                                      |                                    |          | 9.02                                                 | Internet users .....                                      | 104      |
|                                                      |                                    |          | 9.01                                                 | Extent of business Internet use .....                     | 81       |
|                                                      |                                    |          | <b>Price competitiveness in the T&amp;T industry</b> |                                                           |          |
|                                                      |                                    |          | 10.01                                                | Ticket taxes and airport charges.....                     | 96       |
|                                                      |                                    |          | 10.02                                                | Purchasing power parity.....                              | 71       |

(Disadvantages cont'd. from bottom of right column)

<<< (Cont'd. on bottom of left column)

# Norway

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 4.6    |
| Surface area (1,000 square kilometers) .....              | 323.8  |
| Gross domestic product (US\$ billions), 2005 .....        | 295.7  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 42,364 |
| Real GDP growth (percent), 2005 .....                     | 2.3    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

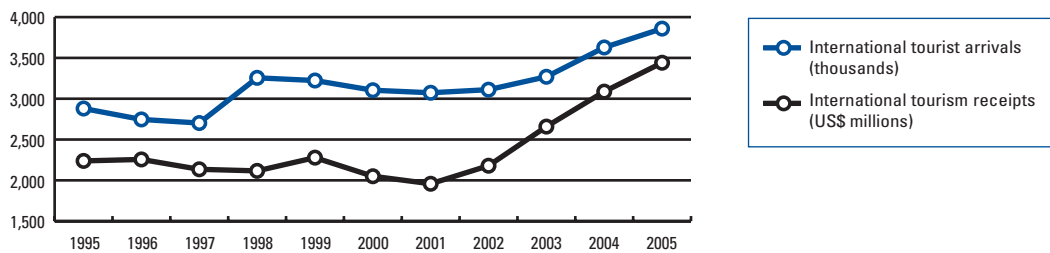
|                               | Percent of total | 2007-2016 annual growth (% forecast) |
|-------------------------------|------------------|--------------------------------------|
| GDP (US\$ millions) .....     | 6,809            | 2.4                                  |
| Employment (1,000 jobs) ..... | 64               | 2.8                                  |

### T&T economy, 2006 estimates

|                               |        |      |
|-------------------------------|--------|------|
| GDP (US\$ millions) .....     | 22,545 | 7.9  |
| Employment (1,000 jobs) ..... | 230    | 10.1 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 3,859 |
| International tourism receipts (US\$ millions), 2005 ..... | 3,441 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank (out of 124) | Score (1-7 scale) |
|--------------------------------------------------------------|-------------------|-------------------|
| <b>2007 Index</b> .....                                      | <b>23</b>         | <b>5.0</b>        |
| <b>T&amp;T regulatory framework</b> .....                    | <b>9</b>          | <b>5.5</b>        |
| Policy rules and regulations .....                           | 34                | 5.1               |
| Environmental regulation .....                               | 9                 | 5.8               |
| Safety and security .....                                    | 9                 | 6.0               |
| Health and hygiene .....                                     | 10                | 6.2               |
| Prioritization of T&T strategies .....                       | 46                | 4.1               |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>21</b>         | <b>4.6</b>        |
| Air transport infrastructure .....                           | 18                | 4.6               |
| Ground transport infrastructure .....                        | 22                | 5.1               |
| Tourism infrastructure .....                                 | 17                | 5.3               |
| ICT infrastructure .....                                     | 24                | 4.7               |
| Price competitiveness in T&T industry .....                  | 121               | 3.1               |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>40</b>         | <b>5.1</b>        |
| Human resources .....                                        | 18                | 5.6               |
| Education and training .....                                 | 15                | 5.9               |
| Availability of qualified labor .....                        | 86                | 4.0               |
| Workforce wellness .....                                     | 4                 | 6.9               |
| National tourism perception .....                            | 108               | 4.3               |
| Natural and cultural resources .....                         | 21                | 5.5               |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                            | Rank/124 | COMPETITIVE DISADVANTAGES                                 | Rank/124 |
|-------------------------------------------------------------------|----------|-----------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                               |          | <b>Policy rules and regulations</b>                       |          |
| 1.02 Property rights.....13                                       |          | 1.05 Openness of bilateral Air Service Agreements .....68 |          |
|                                                                   |          | 1.03 Rules governing foreign direct investment .....49    |          |
| <b>Environmental regulation</b>                                   |          | 1.04 Visa requirements .....43                            |          |
| 2.02 Clarity and stability of environmental regulations .....4    |          | 1.01 Foreign ownership restrictions.....32                |          |
| 2.01 Stringency of environmental regulation .....7                |          |                                                           |          |
|                                                                   |          | <b>Environmental regulation</b>                           |          |
| <b>Safety and security</b>                                        |          | 2.03 Government prioritization of sustainable T&T .....33 |          |
| 3.02 Reliability of police services .....7                        |          |                                                           |          |
| 3.03 Business costs of crime and violence.....9                   |          | <b>Safety and security</b>                                |          |
|                                                                   |          | 3.01 Business costs of terrorism .....46                  |          |
| <b>Health and hygiene</b>                                         |          |                                                           |          |
| 4.03 Access to improved sanitation .....1                         |          | <b>Health and hygiene</b>                                 |          |
| 4.04 Access to improved drinking water .....1                     |          | 4.02 Physician density .....28                            |          |
| 4.01 Gov't efforts to reduce health risks from pandemics .....6   |          |                                                           |          |
|                                                                   |          | <b>Prioritization of Travel &amp; Tourism</b>             |          |
| <b>Air transport infrastructure</b>                               |          | 5.04 T&T fair attendance .....70                          |          |
| 6.03 Departures per 1,000 population.....2                        |          | 5.01 Government prioritization of the T&T industry.....65 |          |
| 6.01 Quality of air transport infrastructure .....19              |          | 5.03 Effectiveness of marketing and branding .....38      |          |
| 6.06 International air transport network .....22                  |          | 5.02 T&T government expenditure .....24                   |          |
|                                                                   |          |                                                           |          |
| <b>Ground transport infrastructure</b>                            |          | <b>Air transport infrastructure</b>                       |          |
| 7.03 Port infrastructure .....17                                  |          | 6.02 Available seat kilometers.....39                     |          |
| 7.04 Domestic transport network .....20                           |          | 6.05 Number of operating airlines .....36                 |          |
|                                                                   |          | 6.04 Airport density .....25                              |          |
| <b>Tourism infrastructure</b>                                     |          |                                                           |          |
| 8.01 Hotel rooms.....14                                           |          | <b>Ground transport infrastructure</b>                    |          |
| 8.03 ATMs accepting Visa cards .....14                            |          | 7.01 Road infrastructure .....38                          |          |
|                                                                   |          | 7.02 Railroad infrastructure .....24                      |          |
| <b>ICT infrastructure</b>                                         |          |                                                           |          |
| 9.01 Extent of business Internet use .....11                      |          | <b>Tourism infrastructure</b>                             |          |
| 9.03 Telephone lines.....21                                       |          | 8.02 Presence of major car rental companies.....35        |          |
|                                                                   |          |                                                           |          |
| <b>Human resources</b>                                            |          | <b>ICT infrastructure</b>                                 |          |
| 11.02 Secondary education enrollment.....1                        |          | 9.02 Internet users .....31                               |          |
| 11.09 Malaria incidence.....1                                     |          |                                                           |          |
| 11.10 Tuberculosis incidence .....4                               |          | <b>Price competitiveness in the T&amp;T industry</b>      |          |
| 11.11 Life expectancy .....8                                      |          | 10.04 Fuel price level .....122                           |          |
| 11.05 Extent of staff training.....10                             |          | 10.02 Purchasing power parity.....120                     |          |
| 11.04 Local availability of research and training services.....15 |          | 10.03 Extent and effect of taxation.....52                |          |
| 11.03 Quality of the educational system .....17                   |          | 10.01 Ticket taxes and airport charges.....46             |          |
|                                                                   |          |                                                           |          |
| <b>National tourism perception</b>                                |          | <b>Human resources</b>                                    |          |
| 12.02 Attitude toward tourists .....15                            |          | 11.06 Hiring and firing practices.....112                 |          |
|                                                                   |          | 11.01 Primary education enrollment .....87                |          |
| <b>Natural and cultural resources</b>                             |          | 11.07 Ease of hiring foreign labor .....32                |          |
| 13.05 Risk of malaria and yellow fever .....1                     |          | 11.08 HIV prevalence .....25                              |          |
| 13.04 Business concern for ecosystems .....8                      |          |                                                           |          |
| 13.02 Carbon dioxide damage.....9                                 |          | <b>National tourism perception</b>                        |          |
|                                                                   |          | 12.03 Recommendation to extend business trips .....121    |          |
|                                                                   |          | 12.01 Tourism openness .....66                            |          |
|                                                                   |          |                                                           |          |
|                                                                   |          | <b>Natural and cultural resources</b>                     |          |
|                                                                   |          | 13.03 Nationally protected areas.....62                   |          |
|                                                                   |          | 13.01 Number of World Heritage sites .....30              |          |

# Pakistan

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 155.8 |
| Surface area (1,000 square kilometers) .....              | 796.1 |
| Gross domestic product (US\$ billions), 2005 .....        | 111.0 |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 2,653 |
| Real GDP growth (percent), 2005 .....                     | 8.0   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

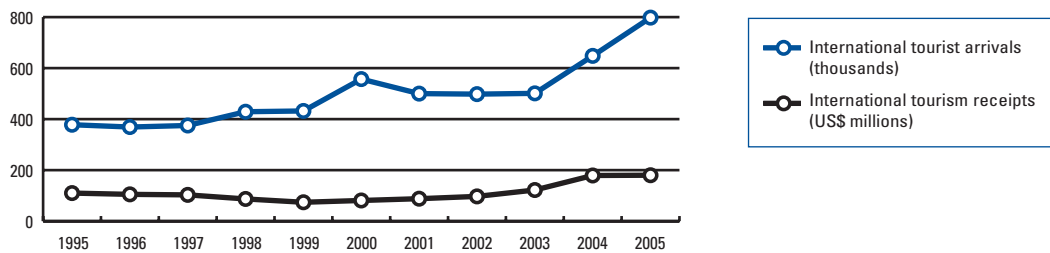
|                               |       | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 3,114 | 2.6                 | 4.6                                         |
| Employment (1,000 jobs) ..... | 1,177 | 2.1                 | 2.5                                         |

### T&T economy, 2006 estimates

|                               |       |     |     |
|-------------------------------|-------|-----|-----|
| GDP (US\$ millions) .....     | 7,549 | 6.3 | 4.4 |
| Employment (1,000 jobs) ..... | 2,904 | 5.1 | 2.3 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2005 .....         | 798 |
| International tourism receipts (US\$ millions), 2005 ..... | 180 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>103</b>           | <b>3.5</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>106</b>           | <b>3.5</b>           |
| Policy rules and regulations .....                           | 98                   | 3.7                  |
| Environmental regulation .....                               | 85                   | 3.6                  |
| Safety and security .....                                    | 106                  | 3.5                  |
| Health and hygiene .....                                     | 91                   | 4.0                  |
| Prioritization of T&T strategies .....                       | 111                  | 2.7                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>75</b>            | <b>3.2</b>           |
| Air transport infrastructure .....                           | 84                   | 2.6                  |
| Ground transport infrastructure .....                        | 52                   | 3.8                  |
| Tourism infrastructure .....                                 | 99                   | 2.2                  |
| ICT infrastructure .....                                     | 89                   | 2.1                  |
| Price competitiveness in T&T industry .....                  | 22                   | 5.2                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>118</b>           | <b>3.9</b>           |
| Human resources .....                                        | 98                   | 4.5                  |
| Education and training .....                                 | 115                  | 3.3                  |
| Availability of qualified labor .....                        | 36                   | 4.7                  |
| Workforce wellness .....                                     | 96                   | 5.4                  |
| National tourism perception .....                            | 123                  | 3.6                  |
| Natural and cultural resources .....                         | 96                   | 3.6                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               |                                       | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                           | Rank/124 |
|------------------------------------------------------|---------------------------------------|----------|------------------------------------------------------|-----------------------------------------------------------|----------|
| <b>Air transport infrastructure</b>                  |                                       |          | <b>Policy rules and regulations</b>                  |                                                           |          |
| 6.02                                                 | Available seat kilometers.....        | 40       | 1.04                                                 | Visa requirements .....                                   | 100      |
| <b>Ground transport infrastructure</b>               |                                       |          | 1.02                                                 | Property rights.....                                      | 95       |
| 7.02                                                 | Railroad infrastructure .....         | 39       | 1.01                                                 | Foreign ownership restrictions.....                       | 72       |
| <b>ICT infrastructure</b>                            |                                       |          | 1.03                                                 | Rules governing foreign direct investment .....           | 66       |
| 9.01                                                 | Extent of business Internet use ..... | 50       | 1.05                                                 | Openness of bilateral Air Service Agreements .....        | 62       |
| <b>Price competitiveness in the T&amp;T industry</b> |                                       |          | <b>Environmental regulation</b>                      |                                                           |          |
| 10.04                                                | Fuel price level .....                | 23       | 2.03                                                 | Government prioritization of sustainable T&T .....        | 98       |
| 10.02                                                | Purchasing power parity.....          | 25       | 2.01                                                 | Stringency of environmental regulation .....              | 77       |
| 10.03                                                | Extent and effect of taxation.....    | 33       | 2.02                                                 | Clarity and stability of environmental regulations .....  | 65       |
| <b>Human resources</b>                               |                                       |          | <b>Safety and security</b>                           |                                                           |          |
| 11.08                                                | HIV prevalence .....                  | 25       | 3.01                                                 | Business costs of terrorism .....                         | 121      |
| 11.06                                                | Hiring and firing practices.....      | 26       | 3.02                                                 | Reliability of police services .....                      | 85       |
| <b>Natural and cultural resources</b>                |                                       |          | 3.03                                                 | Business costs of crime and violence.....                 | 76       |
| 13.01                                                | Number of World Heritage sites .....  | 40       | <b>Health and hygiene</b>                            |                                                           |          |
|                                                      |                                       |          | 4.01                                                 | Gov't efforts to reduce health risks from pandemics ..... | 85       |
|                                                      |                                       |          | 4.02                                                 | Physician density .....                                   | 85       |
|                                                      |                                       |          | 4.03                                                 | Access to improved sanitation .....                       | 81       |
|                                                      |                                       |          | 4.04                                                 | Access to improved drinking water .....                   | 62       |
|                                                      |                                       |          | <b>Prioritization of Travel &amp; Tourism</b>        |                                                           |          |
|                                                      |                                       |          | 5.03                                                 | Effectiveness of marketing and branding .....             | 106      |
|                                                      |                                       |          | 5.01                                                 | Government prioritization of the T&T industry .....       | 105      |
|                                                      |                                       |          | 5.02                                                 | T&T government expenditure .....                          | 91       |
|                                                      |                                       |          | 5.04                                                 | T&T fair attendance .....                                 | 90       |
|                                                      |                                       |          | <b>Air transport infrastructure</b>                  |                                                           |          |
|                                                      |                                       |          | 6.04                                                 | Airport density .....                                     | 115      |
|                                                      |                                       |          | 6.03                                                 | Departures per 1,000 population.....                      | 101      |
|                                                      |                                       |          | 6.06                                                 | International air transport network .....                 | 71       |
|                                                      |                                       |          | 6.01                                                 | Quality of air transport infrastructure .....             | 59       |
|                                                      |                                       |          | 6.05                                                 | Number of operating airlines .....                        | 51       |
|                                                      |                                       |          | <b>Ground transport infrastructure</b>               |                                                           |          |
|                                                      |                                       |          | 7.04                                                 | Domestic transport network .....                          | 65       |
|                                                      |                                       |          | 7.01                                                 | Road infrastructure.....                                  | 61       |
|                                                      |                                       |          | 7.03                                                 | Port infrastructure .....                                 | 52       |
|                                                      |                                       |          | <b>Tourism infrastructure</b>                        |                                                           |          |
|                                                      |                                       |          | 8.01                                                 | Hotel rooms.....                                          | 110      |
|                                                      |                                       |          | 8.03                                                 | ATMs accepting Visa cards .....                           | 110      |
|                                                      |                                       |          | 8.02                                                 | Presence of major car rental companies.....               | 66       |
|                                                      |                                       |          | <b>ICT infrastructure</b>                            |                                                           |          |
|                                                      |                                       |          | 9.02                                                 | Internet users .....                                      | 106      |
|                                                      |                                       |          | 9.03                                                 | Telephone lines.....                                      | 101      |
|                                                      |                                       |          | <b>Price competitiveness in the T&amp;T industry</b> |                                                           |          |
|                                                      |                                       |          | 10.01                                                | Ticket taxes and airport charges.....                     | 83       |
|                                                      |                                       |          | <b>Human resources</b>                               |                                                           |          |
|                                                      |                                       |          | 11.01                                                | Primary education enrollment .....                        | 116      |
|                                                      |                                       |          | 11.02                                                | Secondary education enrollment.....                       | 111      |
|                                                      |                                       |          | 11.10                                                | Tuberculosis incidence .....                              | 101      |
|                                                      |                                       |          | 11.11                                                | Life expectancy .....                                     | 96       |
|                                                      |                                       |          | 11.05                                                | Extent of staff training.....                             | 91       |
|                                                      |                                       |          | 11.09                                                | Malaria incidence.....                                    | 87       |
|                                                      |                                       |          | 11.04                                                | Local availability of research and training services..... | 83       |
|                                                      |                                       |          | 11.03                                                | Quality of the educational system .....                   | 74       |
|                                                      |                                       |          | 11.07                                                | Ease of hiring foreign labor .....                        | 65       |

(Disadvantages cont'd. from bottom of right column)

&lt;&lt;&lt; (Cont'd. on bottom of left column)

# Panama

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 3.2   |
| Surface area (1,000 square kilometers) .....              | 75.5  |
| Gross domestic product (US\$ billions), 2005 .....        | 15.5  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 7,283 |
| Real GDP growth (percent), 2005 .....                     | 6.4   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

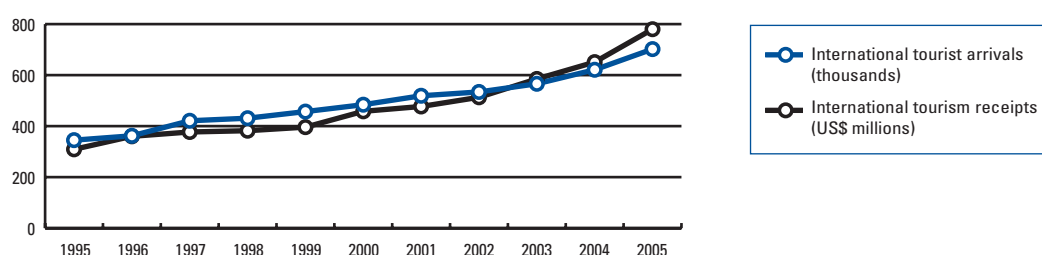
|                               |     | Percent<br>of total | 2007–2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-----|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 725 | 4.5                 | 4.7                                         |
| Employment (1,000 jobs) ..... | 53  | 4.5                 | 3.4                                         |

### T&T economy, 2006 estimates

|                               |       |      |     |
|-------------------------------|-------|------|-----|
| GDP (US\$ millions) .....     | 1,860 | 11.5 | 4.1 |
| Employment (1,000 jobs) ..... | 129   | 10.9 | 2.9 |

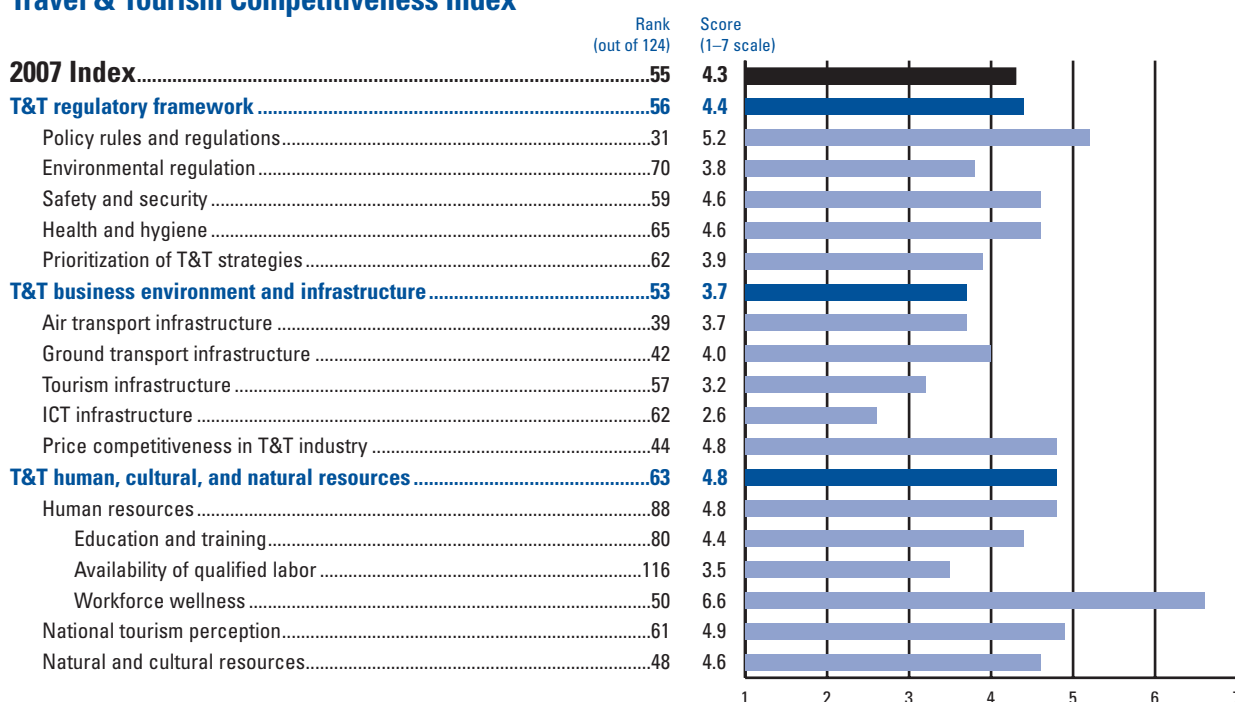
Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2005 .....         | 702 |
| International tourism receipts (US\$ millions), 2005 ..... | 780 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index



Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                    | Rank/124 | COMPETITIVE DISADVANTAGES                                         | Rank/124 |
|-----------------------------------------------------------|----------|-------------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                       |          | <b>Policy rules and regulations</b>                               |          |
| 1.05 Openness of bilateral Air Service Agreements .....11 |          | 1.03 Rules governing foreign direct investment .....61            |          |
| 1.01 Foreign ownership restrictions.....37                |          |                                                                   |          |
| 1.04 Visa requirements .....43                            |          | <b>Environmental regulation</b>                                   |          |
| 1.02 Property rights.....44                               |          | 2.02 Clarity and stability of environmental regulations .....85   |          |
|                                                           |          | 2.01 Stringency of environmental regulation .....66               |          |
| <b>Safety and security</b>                                |          | 2.03 Government prioritization of sustainable T&T .....62         |          |
| 3.02 Reliability of police services .....44               |          |                                                                   |          |
|                                                           |          | <b>Safety and security</b>                                        |          |
| <b>Prioritization of Travel &amp; Tourism</b>             |          | 3.03 Business costs of crime and violence.....68                  |          |
| 5.02 T&T government expenditure .....33                   |          | 3.01 Business costs of terrorism .....66                          |          |
| 5.03 Effectiveness of marketing and branding .....43      |          |                                                                   |          |
|                                                           |          | <b>Health and hygiene</b>                                         |          |
| <b>Air transport infrastructure</b>                       |          | 4.01 Gov't efforts to reduce health risks from pandemics .....81  |          |
| 6.04 Airport density .....13                              |          | 4.03 Access to improved sanitation .....62                        |          |
| 6.06 International air transport network .....26          |          | 4.02 Physician density .....60                                    |          |
| 6.03 Departures per 1,000 population.....33               |          | 4.04 Access to improved drinking water .....58                    |          |
| 6.01 Quality of air transport infrastructure .....42      |          |                                                                   |          |
|                                                           |          | <b>Prioritization of Travel &amp; Tourism</b>                     |          |
| <b>Ground transport infrastructure</b>                    |          | 5.04 T&T fair attendance .....90                                  |          |
| 7.03 Port infrastructure .....14                          |          | 5.01 Government prioritization of the T&T industry.....55         |          |
| 7.01 Road infrastructure .....47                          |          |                                                                   |          |
|                                                           |          | <b>Air transport infrastructure</b>                               |          |
| <b>Tourism infrastructure</b>                             |          | 6.05 Number of operating airlines .....80                         |          |
| 8.01 Hotel rooms.....50                                   |          | 6.02 Available seat kilometers.....66                             |          |
|                                                           |          |                                                                   |          |
| <b>ICT infrastructure</b>                                 |          | <b>Ground transport infrastructure</b>                            |          |
| 9.01 Extent of business Internet use .....38              |          | 7.04 Domestic transport network .....87                           |          |
|                                                           |          | 7.02 Railroad infrastructure .....62                              |          |
| <b>Price competitiveness in the T&amp;T industry</b>      |          |                                                                   |          |
| 10.01 Ticket taxes and airport charges.....18             |          | <b>Tourism infrastructure</b>                                     |          |
| 10.04 Fuel price level .....33                            |          | 8.03 ATMs accepting Visa cards .....58                            |          |
|                                                           |          | 8.02 Presence of major car rental companies.....55                |          |
| <b>Human resources</b>                                    |          |                                                                   |          |
| 11.01 Primary education enrollment .....1                 |          | <b>ICT infrastructure</b>                                         |          |
| 11.11 Life expectancy .....36                             |          | 9.03 Telephone lines.....78                                       |          |
| 11.10 Tuberculosis incidence .....48                      |          | 9.02 Internet users .....65                                       |          |
|                                                           |          |                                                                   |          |
| <b>National tourism perception</b>                        |          | <b>Price competitiveness in the T&amp;T industry</b>              |          |
| 12.03 Recommendation to extend business trips .....34     |          | 10.03 Extent and effect of taxation.....93                        |          |
| 12.01 Tourism openness .....41                            |          | 10.02 Purchasing power parity.....78                              |          |
|                                                           |          |                                                                   |          |
| <b>Natural and cultural resources</b>                     |          | <b>Human resources</b>                                            |          |
| 13.03 Nationally protected areas.....13                   |          | 11.07 Ease of hiring foreign labor .....110                       |          |
| 13.01 Number of World Heritage sites .....48              |          | 11.03 Quality of the educational system .....105                  |          |
|                                                           |          | 11.06 Hiring and firing practices.....99                          |          |
|                                                           |          | 11.09 Malaria incidence.....92                                    |          |
|                                                           |          | 11.08 HIV prevalence .....88                                      |          |
|                                                           |          | 11.02 Secondary education enrollment.....85                       |          |
|                                                           |          | 11.04 Local availability of research and training services.....73 |          |
|                                                           |          | 11.05 Extent of staff training.....58                             |          |
|                                                           |          |                                                                   |          |
|                                                           |          | <b>National tourism perception</b>                                |          |
|                                                           |          | 12.02 Attitude toward tourists .....98                            |          |
|                                                           |          |                                                                   |          |
|                                                           |          | <b>Natural and cultural resources</b>                             |          |
|                                                           |          | 13.05 Risk of malaria and yellow fever .....92                    |          |
|                                                           |          | 13.04 Business concern for ecosystems .....90                     |          |
|                                                           |          | 13.02 Carbon dioxide damage.....56                                |          |

# Paraguay

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 6.2   |
| Surface area (1,000 square kilometers) .....              | 406.8 |
| Gross domestic product (US\$ billions), 2005 .....        | 7.5   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 4,888 |
| Real GDP growth (percent), 2005 .....                     | 2.9   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

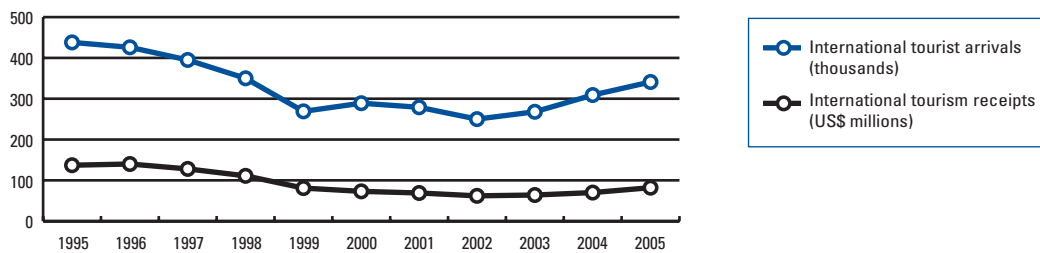
|                               |     | Percent<br>of total | 2007–2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-----|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 131 | 1.6                 | 3.0                                         |
| Employment (1,000 jobs) ..... | 32  | 1.5                 | 2.6                                         |

### T&T economy, 2006 estimates

|                               |     |     |     |
|-------------------------------|-----|-----|-----|
| GDP (US\$ millions) .....     | 454 | 5.7 | 3.4 |
| Employment (1,000 jobs) ..... | 105 | 5.0 | 2.9 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2005 .....         | 341 |
| International tourism receipts (US\$ millions), 2005 ..... | 82  |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1–7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>111</b>           | <b>3.4</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>107</b>           | <b>3.5</b>           |
| Policy rules and regulations .....                           | 95                   | 3.8                  |
| Environmental regulation .....                               | 121                  | 2.7                  |
| Safety and security .....                                    | 101                  | 3.6                  |
| Health and hygiene .....                                     | 88                   | 4.1                  |
| Prioritization of T&T strategies .....                       | 87                   | 3.4                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>92</b>            | <b>2.8</b>           |
| Air transport infrastructure .....                           | 66                   | 2.9                  |
| Ground transport infrastructure .....                        | 119                  | 2.0                  |
| Tourism infrastructure .....                                 | 90                   | 2.3                  |
| ICT infrastructure .....                                     | 109                  | 1.8                  |
| Price competitiveness in T&T industry .....                  | 21                   | 5.2                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>113</b>           | <b>4.0</b>           |
| Human resources .....                                        | 92                   | 4.8                  |
| Education and training .....                                 | 106                  | 3.8                  |
| Availability of qualified labor .....                        | 69                   | 4.2                  |
| Workforce wellness .....                                     | 69                   | 6.3                  |
| National tourism perception .....                            | 115                  | 4.0                  |
| Natural and cultural resources .....                         | 109                  | 3.2                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."



## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               |                                                    | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                            | Rank/124 |
|------------------------------------------------------|----------------------------------------------------|----------|------------------------------------------------------|------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                  |                                                    |          | <b>Policy rules and regulations</b>                  |                                                            |          |
| 1.05                                                 | Openness of bilateral Air Service Agreements ..... | 35       | 1.02                                                 | Property rights .....                                      | 117      |
| <b>Prioritization of Travel &amp; Tourism</b>        |                                                    |          | 1.01                                                 | Foreign ownership restrictions .....                       | 116      |
| 5.02                                                 | T&T government expenditure .....                   | 14       | 1.03                                                 | Rules governing foreign direct investment .....            | 107      |
| <b>Air transport infrastructure</b>                  |                                                    |          | 1.04                                                 | Visa requirements .....                                    | 89       |
| 6.04                                                 | Airport density .....                              | 2        | <b>Environmental regulation</b>                      |                                                            |          |
| <b>Price competitiveness in the T&amp;T industry</b> |                                                    |          | 2.03                                                 | Government prioritization of sustainable T&T .....         | 124      |
| 10.02                                                | Purchasing power parity .....                      | 19       | 2.02                                                 | Clarity and stability of environmental regulations .....   | 120      |
| 10.03                                                | Extent and effect of taxation .....                | 29       | 2.01                                                 | Stringency of environmental regulation .....               | 100      |
| 10.04                                                | Fuel price level .....                             | 37       | <b>Safety and security</b>                           |                                                            |          |
| <b>Human resources</b>                               |                                                    |          | 3.02                                                 | Reliability of police services .....                       | 111      |
| 11.01                                                | Primary education enrollment .....                 | 1        | 3.03                                                 | Business costs of crime and violence .....                 | 108      |
| 11.07                                                | Ease of hiring foreign labor .....                 | 16       | 3.01                                                 | Business costs of terrorism .....                          | 64       |
|                                                      |                                                    |          | <b>Health and hygiene</b>                            |                                                            |          |
|                                                      |                                                    |          | 4.01                                                 | Gov't efforts to reduce health risks from pandemics .....  | 122      |
|                                                      |                                                    |          | 4.02                                                 | Physician density .....                                    | 76       |
|                                                      |                                                    |          | 4.04                                                 | Access to improved drinking water .....                    | 74       |
|                                                      |                                                    |          | 4.03                                                 | Access to improved sanitation .....                        | 58       |
|                                                      |                                                    |          | <b>Prioritization of Travel &amp; Tourism</b>        |                                                            |          |
|                                                      |                                                    |          | 5.03                                                 | Effectiveness of marketing and branding .....              | 122      |
|                                                      |                                                    |          | 5.01                                                 | Government prioritization of the T&T industry .....        | 121      |
|                                                      |                                                    |          | 5.04                                                 | T&T fair attendance .....                                  | 70       |
|                                                      |                                                    |          | <b>Air transport infrastructure</b>                  |                                                            |          |
|                                                      |                                                    |          | 6.05                                                 | Number of operating airlines .....                         | 120      |
|                                                      |                                                    |          | 6.02                                                 | Available seat kilometers .....                            | 109      |
|                                                      |                                                    |          | 6.01                                                 | Quality of air transport infrastructure .....              | 107      |
|                                                      |                                                    |          | 6.06                                                 | International air transport network .....                  | 97       |
|                                                      |                                                    |          | 6.03                                                 | Departures per 1,000 population .....                      | 68       |
|                                                      |                                                    |          | <b>Ground transport infrastructure</b>               |                                                            |          |
|                                                      |                                                    |          | 7.02                                                 | Railroad infrastructure .....                              | 123      |
|                                                      |                                                    |          | 7.04                                                 | Domestic transport network .....                           | 120      |
|                                                      |                                                    |          | 7.01                                                 | Road infrastructure .....                                  | 116      |
|                                                      |                                                    |          | 7.03                                                 | Port infrastructure .....                                  | 94       |
|                                                      |                                                    |          | <b>Tourism infrastructure</b>                        |                                                            |          |
|                                                      |                                                    |          | 8.01                                                 | Hotel rooms .....                                          | 94       |
|                                                      |                                                    |          | 8.03                                                 | ATMs accepting Visa cards .....                            | 83       |
|                                                      |                                                    |          | 8.02                                                 | Presence of major car rental companies .....               | 66       |
|                                                      |                                                    |          | <b>ICT infrastructure</b>                            |                                                            |          |
|                                                      |                                                    |          | 9.01                                                 | Extent of business Internet use .....                      | 113      |
|                                                      |                                                    |          | 9.02                                                 | Internet users .....                                       | 98       |
|                                                      |                                                    |          | 9.03                                                 | Telephone lines .....                                      | 94       |
|                                                      |                                                    |          | <b>Price competitiveness in the T&amp;T industry</b> |                                                            |          |
|                                                      |                                                    |          | 10.01                                                | Ticket taxes and airport charges .....                     | 70       |
|                                                      |                                                    |          | <b>Human resources</b>                               |                                                            |          |
|                                                      |                                                    |          | 11.03                                                | Quality of the educational system .....                    | 124      |
|                                                      |                                                    |          | 11.05                                                | Extent of staff training .....                             | 114      |
|                                                      |                                                    |          | 11.04                                                | Local availability of research and training services ..... | 108      |
|                                                      |                                                    |          | 11.06                                                | Hiring and firing practices .....                          | 102      |
|                                                      |                                                    |          | 11.02                                                | Secondary education enrollment .....                       | 90       |
|                                                      |                                                    |          | 11.09                                                | Malaria incidence .....                                    | 75       |
|                                                      |                                                    |          | 11.08                                                | HIV prevalence .....                                       | 74       |
|                                                      |                                                    |          | 11.10                                                | Tuberculosis incidence .....                               | 74       |
|                                                      |                                                    |          | 11.11                                                | Life expectancy .....                                      | 53       |

(Disadvantages cont'd. from bottom of right column)

<<< (Cont'd. on bottom of left column)

# Peru

## Key indicators

|                                                           |         |
|-----------------------------------------------------------|---------|
| Population (millions), 2005 .....                         | 28.0    |
| Surface area (1,000 square kilometers) .....              | 1,285.2 |
| Gross domestic product (US\$ billions), 2005 .....        | 79.4    |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 5,983   |
| Real GDP growth (percent), 2005 .....                     | 6.4     |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

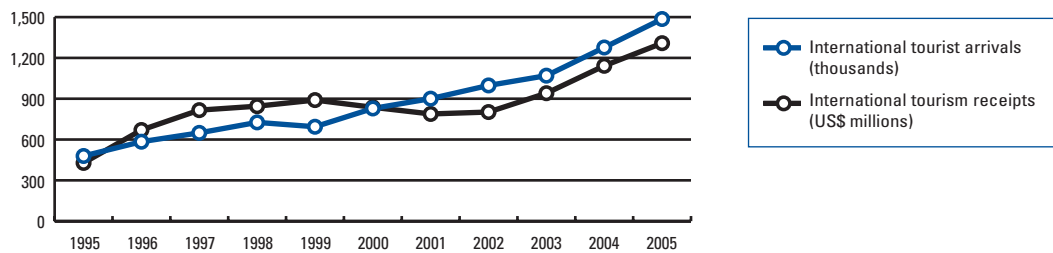
|                               |       | Percent<br>of total | 2007–2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 2,464 | 3.1                 | 4.3                                         |
| Employment (1,000 jobs) ..... | 309   | 3.0                 | 3.0                                         |

### T&T economy, 2006 estimates

|                               |       |     |     |
|-------------------------------|-------|-----|-----|
| GDP (US\$ millions) .....     | 6,127 | 7.7 | 4.2 |
| Employment (1,000 jobs) ..... | 740   | 7.1 | 2.9 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 1,486 |
| International tourism receipts (US\$ millions), 2005 ..... | 1,308 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1–7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index .....</b>                                      | <b>81</b>            | <b>3.9</b>           |
| <b>T&amp;T regulatory framework .....</b>                    | <b>74</b>            | <b>4.0</b>           |
| Policy rules and regulations .....                           | 35                   | 5.1                  |
| Environmental regulation .....                               | 71                   | 3.8                  |
| Safety and security .....                                    | 110                  | 3.4                  |
| Health and hygiene .....                                     | 93                   | 4.0                  |
| Prioritization of T&T strategies .....                       | 61                   | 3.9                  |
| <b>T&amp;T business environment and infrastructure .....</b> | <b>85</b>            | <b>2.9</b>           |
| Air transport infrastructure .....                           | 88                   | 2.6                  |
| Ground transport infrastructure .....                        | 96                   | 2.6                  |
| Tourism infrastructure .....                                 | 66                   | 3.0                  |
| ICT infrastructure .....                                     | 68                   | 2.5                  |
| Price competitiveness in T&T industry .....                  | 89                   | 4.2                  |
| <b>T&amp;T human, cultural, and natural resources .....</b>  | <b>80</b>            | <b>4.6</b>           |
| Human resources .....                                        | 77                   | 4.9                  |
| Education and training .....                                 | 71                   | 4.6                  |
| Availability of qualified labor .....                        | 59                   | 4.4                  |
| Workforce wellness .....                                     | 84                   | 5.9                  |
| National tourism perception .....                            | 105                  | 4.3                  |
| Natural and cultural resources .....                         | 53                   | 4.5                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                  | Rank/124 | COMPETITIVE DISADVANTAGES                                        | Rank/124 |
|---------------------------------------------------------|----------|------------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                     |          | <b>Policy rules and regulations</b>                              |          |
| 1.05 Openness of bilateral Air Service Agreements ..... | 7        | 1.02 Property rights .....                                       | 106      |
| 1.04 Visa requirements .....                            | 15       | <b>Environmental regulation</b>                                  |          |
| 1.01 Foreign ownership restrictions .....               | 44       | 2.03 Government prioritization of sustainable T&T .....          | 79       |
| 1.03 Rules governing foreign direct investment .....    | 48       | 2.02 Clarity and stability of environmental regulations .....    | 67       |
| <b>Prioritization of Travel &amp; Tourism</b>           |          | 2.01 Stringency of environmental regulation .....                | 57       |
| 5.04 T&T fair attendance .....                          | 35       | <b>Safety and security</b>                                       |          |
| 5.03 Effectiveness of marketing and branding .....      | 47       | 3.03 Business costs of crime and violence .....                  | 113      |
| <b>Air transport infrastructure</b>                     |          | 3.01 Business costs of terrorism .....                           | 101      |
| 6.02 Available seat kilometers .....                    | 46       | 3.02 Reliability of police services .....                        | 95       |
| <b>ICT infrastructure</b>                               |          | <b>Health and hygiene</b>                                        |          |
| 9.01 Extent of business Internet use .....              | 46       | 4.01 Gov't efforts to reduce health risks from pandemics .....   | 110      |
| <b>Human resources</b>                                  |          | 4.04 Access to improved drinking water .....                     | 81       |
| 11.01 Primary education enrollment .....                | 1        | 4.02 Physician density .....                                     | 73       |
| 11.07 Ease of hiring foreign labor .....                | 19       | 4.03 Access to improved sanitation .....                         | 73       |
| 11.02 Secondary education enrollment .....              | 47       | <b>Prioritization of Travel &amp; Tourism</b>                    |          |
| <b>Natural and cultural resources</b>                   |          | 5.01 Government prioritization of the T&T industry .....         | 76       |
| 13.01 Number of World Heritage sites .....              | 20       | 5.02 T&T government expenditure .....                            | 69       |
| 13.02 Carbon dioxide damage .....                       | 39       | <b>Air transport infrastructure</b>                              |          |
|                                                         |          | 6.01 Quality of air transport infrastructure .....               | 97       |
|                                                         |          | 6.03 Departures per 1,000 population .....                       | 72       |
|                                                         |          | 6.06 International air transport network .....                   | 65       |
|                                                         |          | 6.05 Number of operating airlines .....                          | 61       |
|                                                         |          | 6.04 Airport density .....                                       | 51       |
|                                                         |          | <b>Ground transport infrastructure</b>                           |          |
|                                                         |          | 7.03 Port infrastructure .....                                   | 105      |
|                                                         |          | 7.04 Domestic transport network .....                            | 93       |
|                                                         |          | 7.02 Railroad infrastructure .....                               | 85       |
|                                                         |          | 7.01 Road infrastructure .....                                   | 83       |
|                                                         |          | <b>Tourism infrastructure</b>                                    |          |
|                                                         |          | 8.03 ATMs accepting Visa cards .....                             | 80       |
|                                                         |          | 8.02 Presence of major car rental companies .....                | 55       |
|                                                         |          | 8.01 Hotel rooms .....                                           | 52       |
|                                                         |          | <b>ICT infrastructure</b>                                        |          |
|                                                         |          | 9.03 Telephone lines .....                                       | 87       |
|                                                         |          | 9.02 Internet users .....                                        | 60       |
|                                                         |          | <b>Price competitiveness in the T&amp;T industry</b>             |          |
|                                                         |          | 10.01 Ticket taxes and airport charges .....                     | 111      |
|                                                         |          | 10.03 Extent and effect of taxation .....                        | 82       |
|                                                         |          | 10.04 Fuel price level .....                                     | 69       |
|                                                         |          | 10.02 Purchasing power parity .....                              | 58       |
|                                                         |          | <b>Human resources</b>                                           |          |
|                                                         |          | 11.03 Quality of the educational system .....                    | 123      |
|                                                         |          | 11.09 Malaria incidence .....                                    | 100      |
|                                                         |          | 11.06 Hiring and firing practices .....                          | 92       |
|                                                         |          | 11.10 Tuberculosis incidence .....                               | 91       |
|                                                         |          | 11.08 HIV prevalence .....                                       | 74       |
|                                                         |          | 11.05 Extent of staff training .....                             | 66       |
|                                                         |          | 11.11 Life expectancy .....                                      | 66       |
|                                                         |          | 11.04 Local availability of research and training services ..... | 63       |
|                                                         |          | <b>National tourism perception</b>                               |          |
|                                                         |          | 12.02 Attitude toward tourists .....                             | 90       |
|                                                         |          | 12.01 Tourism openness .....                                     | 84       |
|                                                         |          | 12.03 Recommendation to extend business trips .....              | 81       |

(Disadvantages cont'd. from bottom of right column)

&lt;&lt;&lt; (Cont'd. on bottom of left column)

# Philippines

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 83.1  |
| Surface area (1,000 square kilometers) .....              | 300.0 |
| Gross domestic product (US\$ billions), 2005 .....        | 98.4  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 4,923 |
| Real GDP growth (percent), 2005 .....                     | 5.0   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

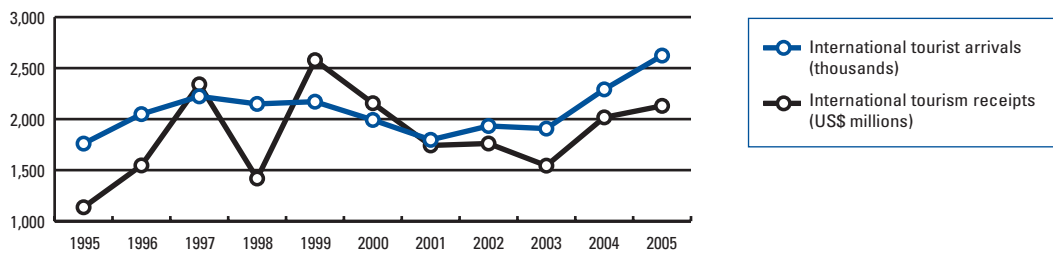
|                               |       | Percent of total | 2007–2016 annual growth (% forecast) |
|-------------------------------|-------|------------------|--------------------------------------|
| GDP (US\$ millions) .....     | 4,327 | 3.9              | 5.0                                  |
| Employment (1,000 jobs) ..... | 1,250 | 4.1              | 2.6                                  |

### T&T economy, 2006 estimates

|                               |       |      |     |
|-------------------------------|-------|------|-----|
| GDP (US\$ millions) .....     | 9,985 | 9.1  | 5.1 |
| Employment (1,000 jobs) ..... | 3,336 | 10.8 | 2.4 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 2,623 |
| International tourism receipts (US\$ millions), 2005 ..... | 2,130 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank (out of 124) | Score (1–7 scale) |
|--------------------------------------------------------------|-------------------|-------------------|
| <b>2007 Index .....</b>                                      | <b>86</b>         | <b>3.8</b>        |
| <b>T&amp;T regulatory framework .....</b>                    | <b>80</b>         | <b>4.0</b>        |
| Policy rules and regulations .....                           | 61                | 4.7               |
| Environmental regulation .....                               | 83                | 3.6               |
| Safety and security .....                                    | 96                | 3.7               |
| Health and hygiene .....                                     | 77                | 4.2               |
| Prioritization of T&T strategies .....                       | 74                | 3.6               |
| <b>T&amp;T business environment and infrastructure .....</b> | <b>79</b>         | <b>3.1</b>        |
| Air transport infrastructure .....                           | 72                | 2.8               |
| Ground transport infrastructure .....                        | 91                | 2.7               |
| Tourism infrastructure .....                                 | 93                | 2.2               |
| ICT infrastructure .....                                     | 83                | 2.2               |
| Price competitiveness in T&T industry .....                  | 7                 | 5.6               |
| <b>T&amp;T human, cultural, and natural resources .....</b>  | <b>100</b>        | <b>4.3</b>        |
| Human resources .....                                        | 93                | 4.6               |
| Education and training .....                                 | 50                | 4.9               |
| Availability of qualified labor .....                        | 93                | 3.9               |
| Workforce wellness .....                                     | 98                | 5.1               |
| National tourism perception .....                            | 83                | 4.6               |
| Natural and cultural resources .....                         | 95                | 3.7               |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                  | Rank/124 | COMPETITIVE DISADVANTAGES                                       | Rank/124 |
|---------------------------------------------------------|----------|-----------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                     |          | <b>Policy rules and regulations</b>                             |          |
| 1.04 Visa requirements .....                            | 15       | 1.01 Foreign ownership restrictions.....                        | 90       |
| 1.05 Openness of bilateral Air Service Agreements ..... | 27       | 1.03 Rules governing foreign direct investment .....            | 78       |
| <b>Air transport infrastructure</b>                     |          | 1.02 Property rights.....                                       | 70       |
| 6.02 Available seat kilometers.....                     | 29       | <b>Environmental regulation</b>                                 |          |
| 6.05 Number of operating airlines.....                  | 40       | 2.02 Clarity and stability of environmental regulations .....   | 97       |
| <b>Price competitiveness in the T&amp;T industry</b>    |          | 2.03 Government prioritization of sustainable T&T .....         | 80       |
| 10.01 Ticket taxes and airport charges.....             | 14       | 2.01 Stringency of environmental regulation .....               | 65       |
| 10.02 Purchasing power parity.....                      | 14       | <b>Safety and security</b>                                      |          |
| 10.04 Fuel price level .....                            | 16       | 3.01 Business costs of terrorism .....                          | 118      |
| 10.03 Extent and effect of taxation.....                | 40       | 3.02 Reliability of police services .....                       | 84       |
| <b>Human resources</b>                                  |          | 3.03 Business costs of crime and violence.....                  | 64       |
| 11.01 Primary education enrollment .....                | 1        | <b>Health and hygiene</b>                                       |          |
| 11.08 HIV prevalence .....                              | 1        | 4.02 Physician density .....                                    | 88       |
| 11.05 Extent of staff training.....                     | 35       | 4.01 Gov't efforts to reduce health risks from pandemics .....  | 82       |
| <b>National tourism perception</b>                      |          | 4.04 Access to improved drinking water .....                    | 70       |
| 12.02 Attitude toward tourists .....                    | 19       | 4.03 Access to improved sanitation .....                        | 61       |
| <b>Natural and cultural resources</b>                   |          | <b>Prioritization of Travel &amp; Tourism</b>                   |          |
| 13.01 Number of World Heritage sites .....              | 48       | 5.01 Government prioritization of the T&T industry.....         | 71       |
|                                                         |          | 5.03 Effectiveness of marketing and branding .....              | 70       |
|                                                         |          | 5.04 T&T fair attendance.....                                   | 70       |
|                                                         |          | 5.02 T&T government expenditure .....                           | 54       |
|                                                         |          | <b>Air transport infrastructure</b>                             |          |
|                                                         |          | 6.04 Airport density.....                                       | 94       |
|                                                         |          | 6.03 Departures per 1,000 population.....                       | 89       |
|                                                         |          | 6.01 Quality of air transport infrastructure .....              | 76       |
|                                                         |          | 6.06 International air transport network .....                  | 62       |
|                                                         |          | <b>Ground transport infrastructure</b>                          |          |
|                                                         |          | 7.04 Domestic transport network .....                           | 92       |
|                                                         |          | 7.03 Port infrastructure .....                                  | 87       |
|                                                         |          | 7.01 Road infrastructure.....                                   | 86       |
|                                                         |          | 7.02 Railroad infrastructure .....                              | 86       |
|                                                         |          | <b>Tourism infrastructure</b>                                   |          |
|                                                         |          | 8.01 Hotel rooms.....                                           | 106      |
|                                                         |          | 8.03 ATMs accepting Visa cards .....                            | 98       |
|                                                         |          | 8.02 Presence of major car rental companies.....                | 66       |
|                                                         |          | <b>ICT infrastructure</b>                                       |          |
|                                                         |          | 9.03 Telephone lines.....                                       | 97       |
|                                                         |          | 9.02 Internet users .....                                       | 83       |
|                                                         |          | 9.01 Extent of business Internet use .....                      | 51       |
|                                                         |          | <b>Human resources</b>                                          |          |
|                                                         |          | 11.10 Tuberculosis incidence .....                              | 106      |
|                                                         |          | 11.07 Ease of hiring foreign labor .....                        | 104      |
|                                                         |          | 11.09 Malaria incidence.....                                    | 84       |
|                                                         |          | 11.06 Hiring and firing practices.....                          | 82       |
|                                                         |          | 11.11 Life expectancy .....                                     | 79       |
|                                                         |          | 11.04 Local availability of research and training services..... | 75       |
|                                                         |          | 11.02 Secondary education enrollment.....                       | 61       |
|                                                         |          | 11.03 Quality of the educational system .....                   | 61       |
|                                                         |          | <b>National tourism perception</b>                              |          |
|                                                         |          | 12.01 Tourism openness .....                                    | 93       |
|                                                         |          | 12.03 Recommendation to extend business trips .....             | 55       |
|                                                         |          | <b>Natural and cultural resources</b>                           |          |
|                                                         |          | 13.05 Risk of malaria and yellow fever .....                    | 103      |
|                                                         |          | 13.02 Carbon dioxide damage.....                                | 76       |
|                                                         |          | 13.04 Business concern for ecosystems .....                     | 75       |
|                                                         |          | 13.03 Nationally protected areas.....                           | 73       |

# Poland

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 38.2   |
| Surface area (1,000 square kilometers) .....              | 312.7  |
| Gross domestic product (US\$ billions), 2005 .....        | 303.2  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 12,994 |
| Real GDP growth (percent), 2005 .....                     | 3.4    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

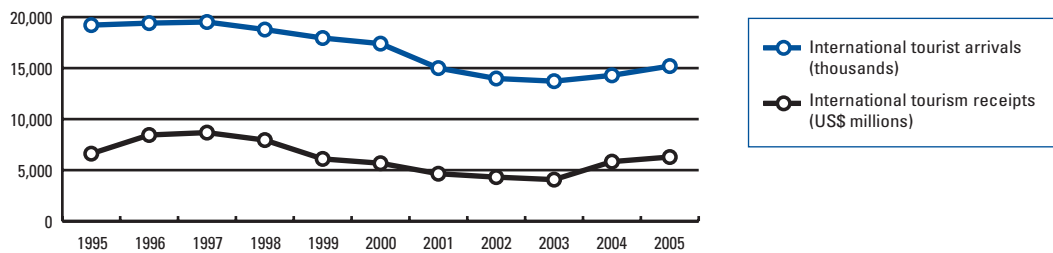
|                               |       | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 6,242 | 2.0                 | 4.5                                         |
| Employment (1,000 jobs) ..... | 259   | 2.0                 | 0.6                                         |

### T&T economy, 2006 estimates

|                               |        |     |     |
|-------------------------------|--------|-----|-----|
| GDP (US\$ millions) .....     | 28,923 | 9.1 | 4.3 |
| Employment (1,000 jobs) ..... | 1,108  | 8.5 | 0.5 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |        |
|------------------------------------------------------------|--------|
| International tourist arrivals (1,000), 2005 .....         | 15,200 |
| International tourism receipts (US\$ millions), 2005 ..... | 6,284  |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>63</b>            | <b>4.2</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>63</b>            | <b>4.2</b>           |
| Policy rules and regulations .....                           | 66                   | 4.7                  |
| Environmental regulation .....                               | 65                   | 4.0                  |
| Safety and security .....                                    | 71                   | 4.3                  |
| Health and hygiene .....                                     | 89                   | 4.1                  |
| Prioritization of T&T strategies .....                       | 42                   | 4.2                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>62</b>            | <b>3.5</b>           |
| Air transport infrastructure .....                           | 86                   | 2.6                  |
| Ground transport infrastructure .....                        | 61                   | 3.6                  |
| Tourism infrastructure .....                                 | 46                   | 3.6                  |
| ICT infrastructure .....                                     | 43                   | 3.5                  |
| Price competitiveness in T&T industry .....                  | 83                   | 4.2                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>60</b>            | <b>4.8</b>           |
| Human resources .....                                        | 44                   | 5.3                  |
| Education and training .....                                 | 32                   | 5.2                  |
| Availability of qualified labor .....                        | 85                   | 4.0                  |
| Workforce wellness .....                                     | 35                   | 6.7                  |
| National tourism perception .....                            | 122                  | 3.6                  |
| Natural and cultural resources .....                         | 19                   | 5.5                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                            | Rank/124 | COMPETITIVE DISADVANTAGES                                        | Rank/124 |
|-------------------------------------------------------------------|----------|------------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                               |          | <b>Policy rules and regulations</b>                              |          |
| 1.05 Openness of bilateral Air Service Agreements .....12         |          | 1.03 Rules governing foreign direct investment .....102          |          |
| 1.04 Visa requirements .....15                                    |          | 1.01 Foreign ownership restrictions.....99                       |          |
|                                                                   |          | 1.02 Property rights.....92                                      |          |
| <b>Environmental regulation</b>                                   |          | <b>Environmental regulation</b>                                  |          |
| 2.02 Clarity and stability of environmental regulations .....48   |          | 2.03 Government prioritization of sustainable T&T .....97        |          |
|                                                                   |          | 2.01 Stringency of environmental regulation .....51              |          |
| <b>Health and hygiene</b>                                         |          | <b>Safety and security</b>                                       |          |
| 4.02 Physician density.....39                                     |          | 3.01 Business costs of terrorism .....93                         |          |
|                                                                   |          | 3.02 Reliability of police services .....69                      |          |
| <b>Prioritization of Travel &amp; Tourism</b>                     |          | 3.03 Business costs of crime and violence.....62                 |          |
| 5.04 T&T fair attendance .....1                                   |          |                                                                  |          |
| <b>Air transport infrastructure</b>                               |          | <b>Health and hygiene</b>                                        |          |
| 6.05 Number of operating airlines.....39                          |          | 4.01 Gov't efforts to reduce health risks from pandemics .....87 |          |
| 6.02 Available seat kilometers.....50                             |          |                                                                  |          |
| <b>Ground transport infrastructure</b>                            |          | <b>Prioritization of Travel &amp; Tourism</b>                    |          |
| 7.02 Railroad infrastructure .....38                              |          | 5.01 Government prioritization of the T&T industry .....104      |          |
|                                                                   |          | 5.03 Effectiveness of marketing and branding .....86             |          |
| <b>Tourism infrastructure</b>                                     |          | 5.02 T&T government expenditure .....69                          |          |
| 8.02 Presence of major car rental companies.....1                 |          |                                                                  |          |
| 8.03 ATMs accepting Visa cards .....45                            |          | <b>Air transport infrastructure</b>                              |          |
|                                                                   |          | 6.04 Airport density .....89                                     |          |
| <b>ICT infrastructure</b>                                         |          | 6.01 Quality of air transport infrastructure .....86             |          |
| 9.03 Telephone lines.....39                                       |          | 6.06 International air transport network .....78                 |          |
| 9.01 Extent of business Internet use .....41                      |          | 6.03 Departures per 1,000 population.....63                      |          |
| 9.02 Internet users .....45                                       |          |                                                                  |          |
| <b>Price competitiveness in the T&amp;T industry</b>              |          | <b>Ground transport infrastructure</b>                           |          |
| 10.01 Ticket taxes and airport charges.....49                     |          | 7.04 Domestic transport network .....82                          |          |
|                                                                   |          | 7.01 Road infrastructure.....67                                  |          |
| <b>Human resources</b>                                            |          | 7.03 Port infrastructure .....60                                 |          |
| 11.09 Malaria incidence.....1                                     |          |                                                                  |          |
| 11.08 HIV prevalence .....25                                      |          | <b>Tourism infrastructure</b>                                    |          |
| 11.02 Secondary education enrollment.....34                       |          | 8.01 Hotel rooms.....68                                          |          |
| 11.03 Quality of the educational system .....34                   |          |                                                                  |          |
| 11.04 Local availability of research and training services.....39 |          | <b>Price competitiveness in the T&amp;T industry</b>             |          |
| 11.10 Tuberculosis incidence .....39                              |          | 10.04 Fuel price level .....104                                  |          |
| 11.11 Life expectancy .....39                                     |          | 10.02 Purchasing power parity.....75                             |          |
| 11.05 Extent of staff training.....48                             |          | 10.03 Extent and effect of taxation.....64                       |          |
|                                                                   |          |                                                                  |          |
| <b>Natural and cultural resources</b>                             |          | <b>Human resources</b>                                           |          |
| 13.05 Risk of malaria and yellow fever .....1                     |          | 11.07 Ease of hiring foreign labor .....103                      |          |
| 13.01 Number of World Heritage sites .....15                      |          | 11.01 Primary education enrollment .....88                       |          |
| 13.03 Nationally protected areas.....35                           |          | 11.06 Hiring and firing practices.....64                         |          |
| 13.04 Business concern for ecosystems .....40                     |          |                                                                  |          |
|                                                                   |          | <b>National tourism perception</b>                               |          |
|                                                                   |          | 12.02 Attitude toward tourists .....124                          |          |
|                                                                   |          | 12.03 Recommendation to extend business trips .....115           |          |
|                                                                   |          | 12.01 Tourism openness .....89                                   |          |
|                                                                   |          |                                                                  |          |
|                                                                   |          | <b>Natural and cultural resources</b>                            |          |
|                                                                   |          | 13.02 Carbon dioxide damage.....92                               |          |

# Portugal

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 10.6   |
| Surface area (1,000 square kilometers) .....              | 92.0   |
| Gross domestic product (US\$ billions), 2005 .....        | 183.6  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 19,335 |
| Real GDP growth (percent), 2005 .....                     | 0.4    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

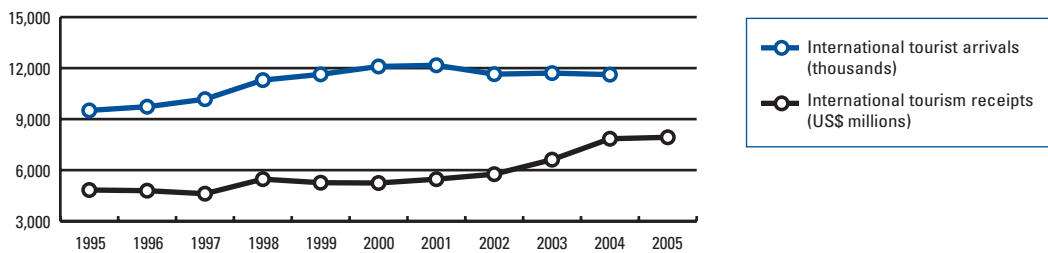
|                               |        | Percent<br>of total | 2007–2016<br>annual growth<br>(%, forecast) |
|-------------------------------|--------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 11,970 | 6.4                 | 3.9                                         |
| Employment (1,000 jobs) ..... | 373    | 7.3                 | 1.6                                         |

### T&T economy, 2006 estimates

|                               |        |      |     |
|-------------------------------|--------|------|-----|
| GDP (US\$ millions) .....     | 28,782 | 15.5 | 3.8 |
| Employment (1,000 jobs) ..... | 907    | 17.7 | 1.5 |

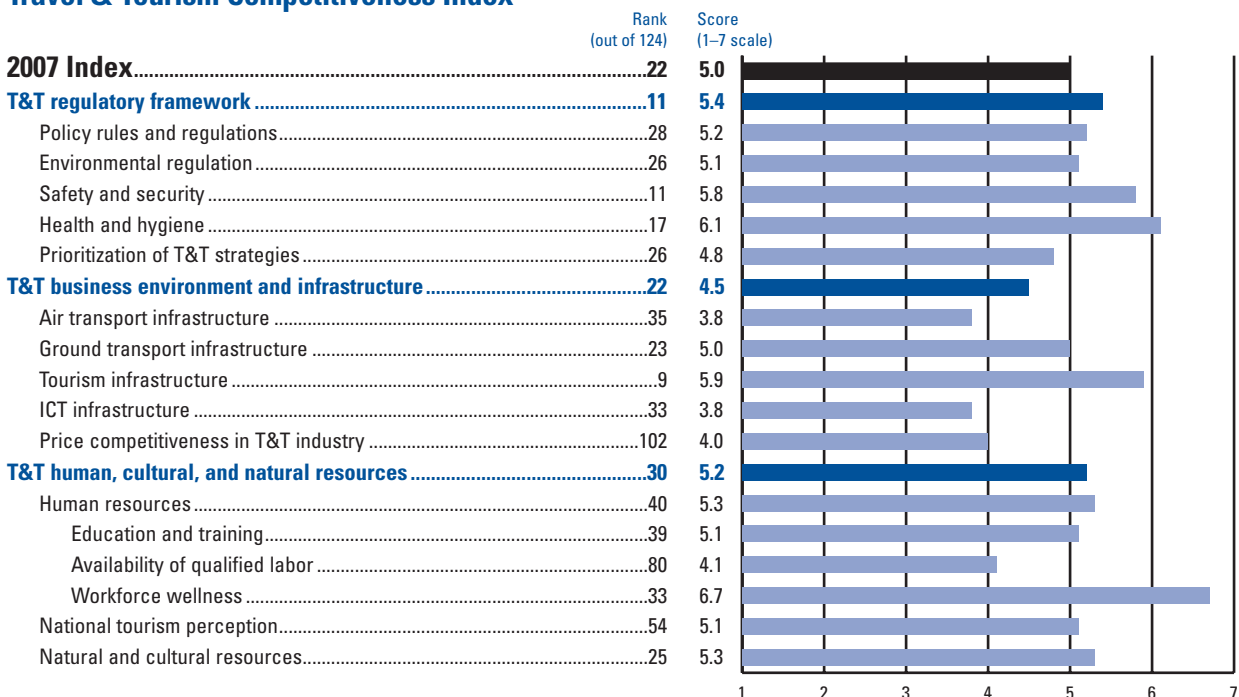
Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |        |
|------------------------------------------------------------|--------|
| International tourist arrivals (1,000), 2004 .....         | 11,617 |
| International tourism receipts (US\$ millions), 2005 ..... | 7,931  |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index



Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."



## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                  | Rank/124 | COMPETITIVE DISADVANTAGES                                       | Rank/124 |
|---------------------------------------------------------|----------|-----------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                     |          | <b>Policy rules and regulations</b>                             |          |
| 1.03 Rules governing foreign direct investment .....    | 13       | 1.01 Foreign ownership restrictions.....                        | 46       |
| 1.05 Openness of bilateral Air Service Agreements ..... | 18       | 1.04 Visa requirements .....                                    | 43       |
| <b>Safety and security</b>                              |          | 1.02 Property rights.....                                       | 33       |
| 3.01 Business costs of terrorism .....                  | 9        | <b>Environmental regulation</b>                                 |          |
| 3.03 Business costs of crime and violence.....          | 15       | 2.02 Clarity and stability of environmental regulations .....   | 32       |
| <b>Health and hygiene</b>                               |          | 2.03 Government prioritization of sustainable T&T .....         | 28       |
| 4.03 Access to improved sanitation .....                | 1        | 2.01 Stringency of environmental regulation .....               | 22       |
| 4.04 Access to improved drinking water .....            | 1        | <b>Safety and security</b>                                      |          |
| 4.02 Physician density.....                             | 17       | 3.02 Reliability of police services .....                       | 25       |
| <b>Prioritization of Travel &amp; Tourism</b>           |          | <b>Health and hygiene</b>                                       |          |
| 5.03 Effectiveness of marketing and branding .....      | 17       | 4.01 Gov't efforts to reduce health risks from pandemics .....  | 36       |
| 5.01 Government prioritization of the T&T industry..... | 19       | <b>Prioritization of Travel &amp; Tourism</b>                   |          |
| 5.02 T&T government expenditure .....                   | 20       | 5.04 T&T fair attendance.....                                   | 48       |
| <b>Air transport infrastructure</b>                     |          | <b>Air transport infrastructure</b>                             |          |
| 6.05 Number of operating airlines .....                 | 19       | 6.04 Airport density .....                                      | 68       |
| <b>Ground transport infrastructure</b>                  |          | 6.06 International air transport network .....                  | 35       |
| 7.01 Road infrastructure.....                           | 20       | 6.02 Available seat kilometers.....                             | 30       |
| <b>Tourism infrastructure</b>                           |          | 6.03 Departures per 1,000 population.....                       | 29       |
| 8.02 Presence of major car rental companies.....        | 1        | 6.01 Quality of air transport infrastructure .....              | 24       |
| 8.03 ATMs accepting Visa cards .....                    | 4        | <b>Ground transport infrastructure</b>                          |          |
| <b>Human resources</b>                                  |          | 7.03 Port infrastructure .....                                  | 36       |
| 11.01 Primary education enrollment .....                | 1        | 7.02 Railroad infrastructure .....                              | 26       |
| 11.09 Malaria incidence.....                            | 1        | 7.04 Domestic transport network .....                           | 25       |
| 11.07 Ease of hiring foreign labor .....                | 18       | <b>Tourism infrastructure</b>                                   |          |
| <b>Natural and cultural resources</b>                   |          | 8.01 Hotel rooms.....                                           | 27       |
| 13.01 Number of World Heritage sites .....              | 15       | <b>ICT infrastructure</b>                                       |          |
|                                                         |          | 9.02 Internet users .....                                       | 40       |
|                                                         |          | 9.01 Extent of business Internet use .....                      | 37       |
|                                                         |          | 9.03 Telephone lines.....                                       | 33       |
|                                                         |          | <b>Price competitiveness in the T&amp;T industry</b>            |          |
|                                                         |          | 10.04 Fuel price level .....                                    | 102      |
|                                                         |          | 10.02 Purchasing power parity.....                              | 96       |
|                                                         |          | 10.03 Extent and effect of taxation.....                        | 56       |
|                                                         |          | 10.01 Ticket taxes and airport charges.....                     | 54       |
|                                                         |          | <b>Human resources</b>                                          |          |
|                                                         |          | 11.06 Hiring and firing practices.....                          | 110      |
|                                                         |          | 11.08 HIV prevalence .....                                      | 69       |
|                                                         |          | 11.03 Quality of the educational system .....                   | 58       |
|                                                         |          | 11.05 Extent of staff training.....                             | 55       |
|                                                         |          | 11.10 Tuberculosis incidence .....                              | 42       |
|                                                         |          | 11.04 Local availability of research and training services..... | 38       |
|                                                         |          | 11.02 Secondary education enrollment.....                       | 35       |
|                                                         |          | 11.11 Life expectancy .....                                     | 24       |
|                                                         |          | <b>National tourism perception</b>                              |          |
|                                                         |          | 12.02 Attitude toward tourists .....                            | 55       |
|                                                         |          | 12.01 Tourism openness .....                                    | 42       |
|                                                         |          | 12.03 Recommendation to extend business trips .....             | 22       |
|                                                         |          | <b>Natural and cultural resources</b>                           |          |
|                                                         |          | 13.03 Nationally protected areas.....                           | 65       |
|                                                         |          | 13.02 Carbon dioxide damage.....                                | 29       |
|                                                         |          | 13.04 Business concern for ecosystems .....                     | 24       |

# Qatar

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 0.8    |
| Surface area (1,000 square kilometers) .....              | 11.0   |
| Gross domestic product (US\$ billions), 2005 .....        | 34.3   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 31,397 |
| Real GDP growth (percent), 2005 .....                     | 6.5    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

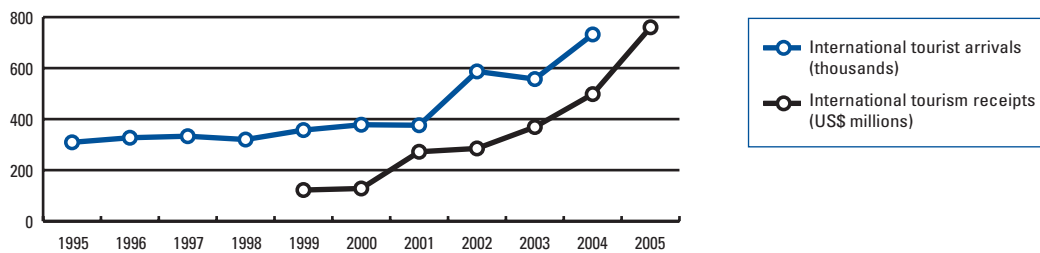
|                               |     | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-----|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 524 | 1.4                 | 5.2                                         |
| Employment (1,000 jobs) ..... | 7   | 2.0                 | 2.8                                         |

### T&T economy, 2006 estimates

|                               |       |      |     |
|-------------------------------|-------|------|-----|
| GDP (US\$ millions) .....     | 4,154 | 11.4 | 3.4 |
| Employment (1,000 jobs) ..... | 39    | 11.6 | 1.4 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2004 .....         | 732 |
| International tourism receipts (US\$ millions), 2005 ..... | 760 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>36</b>            | <b>4.7</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>34</b>            | <b>5.0</b>           |
| Policy rules and regulations .....                           | 65                   | 4.7                  |
| Environmental regulation .....                               | 29                   | 4.9                  |
| Safety and security .....                                    | 17                   | 5.6                  |
| Health and hygiene .....                                     | 24                   | 5.9                  |
| Prioritization of T&T strategies .....                       | 40                   | 4.2                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>39</b>            | <b>4.1</b>           |
| Air transport infrastructure .....                           | 29                   | 3.9                  |
| Ground transport infrastructure .....                        | 48                   | 3.9                  |
| Tourism infrastructure .....                                 | 26                   | 4.4                  |
| ICT infrastructure .....                                     | 49                   | 3.1                  |
| Price competitiveness in T&T industry .....                  | 25                   | 5.1                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>49</b>            | <b>5.0</b>           |
| Human resources .....                                        | 19                   | 5.6                  |
| Education and training .....                                 | 31                   | 5.3                  |
| Availability of qualified labor .....                        | 22                   | 5.0                  |
| Workforce wellness .....                                     | 46                   | 6.6                  |
| National tourism perception .....                            | 41                   | 5.3                  |
| Natural and cultural resources .....                         | 75                   | 4.1                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                           | Rank/124 | COMPETITIVE DISADVANTAGES                                         | Rank/124 |
|------------------------------------------------------------------|----------|-------------------------------------------------------------------|----------|
| <b>Environmental regulation</b>                                  |          | <b>Policy rules and regulations</b>                               |          |
| 2.03 Government prioritization of sustainable T&T .....10        |          | 1.01 Foreign ownership restrictions.....91                        |          |
| 2.02 Clarity and stability of environmental regulations .....26  |          | 1.04 Visa requirements .....85                                    |          |
|                                                                  |          | 1.03 Rules governing foreign direct investment .....52            |          |
| <b>Safety and security</b>                                       |          | 1.05 Openness of bilateral Air Service Agreements .....51         |          |
| 3.03 Business costs of crime and violence.....13                 |          | 1.02 Property rights.....38                                       |          |
| 3.02 Reliability of police services .....21                      |          |                                                                   |          |
|                                                                  |          | <b>Environmental regulation</b>                                   |          |
| <b>Health and hygiene</b>                                        |          | 2.01 Stringency of environmental regulation .....42               |          |
| 4.03 Access to improved sanitation .....1                        |          |                                                                   |          |
| 4.04 Access to improved drinking water .....1                    |          | <b>Safety and security</b>                                        |          |
| 4.01 Gov't efforts to reduce health risks from pandemics .....13 |          | 3.01 Business costs of terrorism .....46                          |          |
|                                                                  |          |                                                                   |          |
| <b>Prioritization of Travel &amp; Tourism</b>                    |          | <b>Health and hygiene</b>                                         |          |
| 5.01 Government prioritization of the T&T industry.....24        |          | 4.02 Physician density.....46                                     |          |
| 5.02 T&T government expenditure .....26                          |          |                                                                   |          |
|                                                                  |          | <b>Prioritization of Travel &amp; Tourism</b>                     |          |
| <b>Air transport infrastructure</b>                              |          | 5.04 T&T fair attendance.....70                                   |          |
| 6.03 Departures per 1,000 population.....8                       |          | 5.03 Effectiveness of marketing and branding .....60              |          |
| 6.01 Quality of air transport infrastructure .....35             |          |                                                                   |          |
|                                                                  |          | <b>Air transport infrastructure</b>                               |          |
| <b>Tourism infrastructure</b>                                    |          | 6.04 Airport density .....77                                      |          |
| 8.02 Presence of major car rental companies.....1                |          | 6.05 Number of operating airlines.....57                          |          |
| 8.03 ATMs accepting Visa cards .....23                           |          | 6.02 Available seat kilometers.....44                             |          |
|                                                                  |          | 6.06 International air transport network .....43                  |          |
| <b>Price competitiveness in the T&amp;T industry</b>             |          |                                                                   |          |
| 10.01 Ticket taxes and airport charges.....4                     |          | <b>Ground transport infrastructure</b>                            |          |
| 10.04 Fuel price level .....4                                    |          | 7.02 Railroad infrastructure .....60                              |          |
| 10.03 Extent and effect of taxation.....5                        |          | 7.04 Domestic transport network .....49                           |          |
|                                                                  |          | 7.01 Road infrastructure.....48                                   |          |
| <b>Human resources</b>                                           |          | 7.03 Port infrastructure .....42                                  |          |
| 11.01 Primary education enrollment .....1                        |          |                                                                   |          |
| 11.08 HIV prevalence .....1                                      |          | <b>Tourism infrastructure</b>                                     |          |
| 11.09 Malaria incidence.....1                                    |          | 8.01 Hotel rooms.....48                                           |          |
| 11.03 Quality of the educational system .....20                  |          |                                                                   |          |
| 11.07 Ease of hiring foreign labor .....23                       |          | <b>ICT infrastructure</b>                                         |          |
| 11.06 Hiring and firing practices.....31                         |          | 9.01 Extent of business Internet use .....66                      |          |
| 11.02 Secondary education enrollment.....33                      |          | 9.03 Telephone lines.....48                                       |          |
|                                                                  |          | 9.02 Internet users .....46                                       |          |
| <b>Natural and cultural resources</b>                            |          |                                                                   |          |
| 13.05 Risk of malaria and yellow fever .....1                    |          | <b>Price competitiveness in the T&amp;T industry</b>              |          |
|                                                                  |          | 10.02 Purchasing power parity.....119                             |          |
|                                                                  |          |                                                                   |          |
|                                                                  |          | <b>Human resources</b>                                            |          |
|                                                                  |          | 11.10 Tuberculosis incidence .....63                              |          |
|                                                                  |          | 11.04 Local availability of research and training services.....57 |          |
|                                                                  |          | 11.05 Extent of staff training.....57                             |          |
|                                                                  |          | 11.11 Life expectancy .....36                                     |          |
|                                                                  |          |                                                                   |          |
|                                                                  |          | <b>National tourism perception</b>                                |          |
|                                                                  |          | 12.03 Recommendation to extend business trips .....108            |          |
|                                                                  |          | 12.02 Attitude toward tourists .....94                            |          |
|                                                                  |          |                                                                   |          |
|                                                                  |          | <b>Natural and cultural resources</b>                             |          |
|                                                                  |          | 13.01 Number of World Heritage sites .....107                     |          |
|                                                                  |          | 13.04 Business concern for ecosystems .....41                     |          |

# Romania

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 21.6  |
| Surface area (1,000 square kilometers) .....              | 238.4 |
| Gross domestic product (US\$ billions), 2005 .....        | 98.6  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 8,785 |
| Real GDP growth (percent), 2005 .....                     | 4.1   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

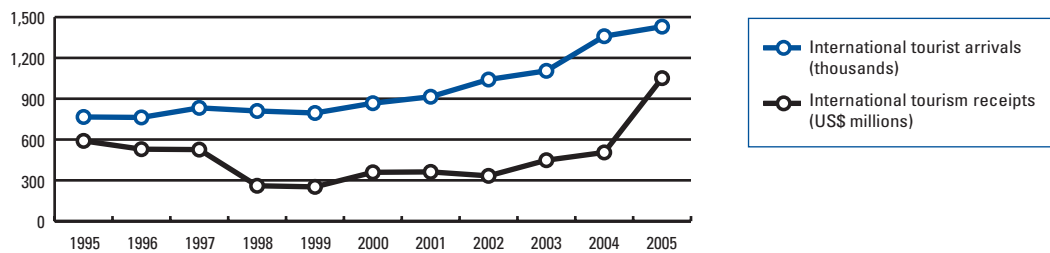
|                               |       | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 1,783 | 1.9                 | 7.4                                         |
| Employment (1,000 jobs) ..... | 265   | 3.1                 | 1.7                                         |

### T&T economy, 2006 estimates

|                               |       |     |     |
|-------------------------------|-------|-----|-----|
| GDP (US\$ millions) .....     | 4,455 | 4.8 | 6.7 |
| Employment (1,000 jobs) ..... | 485   | 5.8 | 1.6 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 1,430 |
| International tourism receipts (US\$ millions), 2005 ..... | 1,051 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index .....</b>                                      | <b>76</b>            | <b>3.9</b>           |
| <b>T&amp;T regulatory framework .....</b>                    | <b>87</b>            | <b>3.9</b>           |
| Policy rules and regulations .....                           | 67                   | 4.6                  |
| Environmental regulation .....                               | 101                  | 3.3                  |
| Safety and security .....                                    | 72                   | 4.3                  |
| Health and hygiene .....                                     | 99                   | 3.7                  |
| Prioritization of T&T strategies .....                       | 82                   | 3.4                  |
| <b>T&amp;T business environment and infrastructure .....</b> | <b>74</b>            | <b>3.2</b>           |
| Air transport infrastructure .....                           | 93                   | 2.4                  |
| Ground transport infrastructure .....                        | 77                   | 3.0                  |
| Tourism infrastructure .....                                 | 50                   | 3.5                  |
| ICT infrastructure .....                                     | 56                   | 2.8                  |
| Price competitiveness in T&T industry .....                  | 87                   | 4.2                  |
| <b>T&amp;T human, cultural, and natural resources .....</b>  | <b>71</b>            | <b>4.7</b>           |
| Human resources .....                                        | 76                   | 5.0                  |
| Education and training .....                                 | 52                   | 4.9                  |
| Availability of qualified labor .....                        | 91                   | 3.9                  |
| Workforce wellness .....                                     | 76                   | 6.1                  |
| National tourism perception .....                            | 95                   | 4.4                  |
| Natural and cultural resources .....                         | 46                   | 4.6                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                          | Rank/124 | COMPETITIVE DISADVANTAGES                                      | Rank/124 |
|-----------------------------------------------------------------|----------|----------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                             |          | <b>Policy rules and regulations</b>                            |          |
| 1.04 Visa requirements .....                                    | 1        | 1.03 Rules governing foreign direct investment .....           | 88       |
| <b>Prioritization of Travel &amp; Tourism</b>                   |          | 1.01 Foreign ownership restrictions.....                       | 81       |
| 5.04 T&T fair attendance .....                                  | 23       | 1.05 Openness of bilateral Air Service Agreements .....        | 79       |
| <b>Tourism infrastructure</b>                                   |          | 1.02 Property rights .....                                     | 76       |
| 8.02 Presence of major car rental companies.....                | 35       | <b>Environmental regulation</b>                                |          |
| 8.03 ATMs accepting Visa cards .....                            | 50       | 2.03 Government prioritization of sustainable T&T .....        | 115      |
| <b>ICT infrastructure</b>                                       |          | 2.02 Clarity and stability of environmental regulations .....  | 83       |
| 9.02 Internet users .....                                       | 49       | 2.01 Stringency of environmental regulation .....              | 74       |
| <b>Human resources</b>                                          |          | <b>Safety and security</b>                                     |          |
| 11.01 Primary education enrollment .....                        | 1        | 3.02 Reliability of police services .....                      | 79       |
| 11.08 HIV prevalence .....                                      | 1        | 3.03 Business costs of crime and violence.....                 | 72       |
| 11.09 Malaria incidence.....                                    | 1        | 3.01 Business costs of terrorism .....                         | 60       |
| 11.04 Local availability of research and training services..... | 44       | <b>Health and hygiene</b>                                      |          |
| <b>Natural and cultural resources</b>                           |          | 4.04 Access to improved drinking water .....                   | 103      |
| 13.05 Risk of malaria and yellow fever .....                    | 1        | 4.01 Gov't efforts to reduce health risks from pandemics ..... | 97       |
| 13.01 Number of World Heritage sites .....                      | 30       | 4.03 Access to improved sanitation .....                       | 85       |
|                                                                 |          | 4.02 Physician density .....                                   | 56       |
|                                                                 |          | <b>Prioritization of Travel &amp; Tourism</b>                  |          |
|                                                                 |          | 5.03 Effectiveness of marketing and branding .....             | 111      |
|                                                                 |          | 5.01 Government prioritization of the T&T industry.....        | 107      |
|                                                                 |          | 5.02 T&T government expenditure .....                          | 58       |
|                                                                 |          | <b>Air transport infrastructure</b>                            |          |
|                                                                 |          | 6.04 Airport density .....                                     | 97       |
|                                                                 |          | 6.01 Quality of air transport infrastructure .....             | 90       |
|                                                                 |          | 6.06 International air transport network .....                 | 82       |
|                                                                 |          | 6.03 Departures per 1,000 population.....                      | 77       |
|                                                                 |          | 6.02 Available seat kilometers.....                            | 68       |
|                                                                 |          | 6.05 Number of operating airlines .....                        | 54       |
|                                                                 |          | <b>Ground transport infrastructure</b>                         |          |
|                                                                 |          | 7.01 Road infrastructure .....                                 | 111      |
|                                                                 |          | 7.04 Domestic transport network .....                          | 83       |
|                                                                 |          | 7.03 Port infrastructure .....                                 | 75       |
|                                                                 |          | 7.02 Railroad infrastructure .....                             | 54       |
|                                                                 |          | <b>Tourism infrastructure</b>                                  |          |
|                                                                 |          | 8.01 Hotel rooms.....                                          | 51       |
|                                                                 |          | <b>ICT infrastructure</b>                                      |          |
|                                                                 |          | 9.01 Extent of business Internet use .....                     | 80       |
|                                                                 |          | 9.03 Telephone lines.....                                      | 59       |
|                                                                 |          | <b>Price competitiveness in the T&amp;T industry</b>           |          |
|                                                                 |          | 10.03 Extent and effect of taxation.....                       | 108      |
|                                                                 |          | 10.04 Fuel price level .....                                   | 84       |
|                                                                 |          | 10.01 Ticket taxes and airport charges.....                    | 73       |
|                                                                 |          | 10.02 Purchasing power parity.....                             | 64       |
|                                                                 |          | <b>Human resources</b>                                         |          |
|                                                                 |          | 11.07 Ease of hiring foreign labor .....                       | 96       |
|                                                                 |          | 11.10 Tuberculosis incidence .....                             | 86       |
|                                                                 |          | 11.06 Hiring and firing practices.....                         | 85       |
|                                                                 |          | 11.05 Extent of staff training.....                            | 81       |
|                                                                 |          | 11.02 Secondary education enrollment.....                      | 63       |
|                                                                 |          | 11.11 Life expectancy .....                                    | 53       |
|                                                                 |          | 11.03 Quality of the educational system .....                  | 51       |

(Disadvantages cont'd. from bottom of right column)

| COMPETITIVE DISADVANTAGES                           | Rank/124 |
|-----------------------------------------------------|----------|
| <b>National tourism perception</b>                  |          |
| 12.01 Tourism openness .....                        | 85       |
| 12.02 Attitude toward tourists .....                | 76       |
| 12.03 Recommendation to extend business trips ..... | 69       |
| <b>Natural and cultural resources</b>               |          |
| 13.02 Carbon dioxide damage.....                    | 95       |
| 13.04 Business concern for ecosystems .....         | 87       |
| 13.03 Nationally protected areas.....               | 80       |

&lt;&lt;&lt; (Cont'd. on bottom of left column)

# Russian Federation

## Key indicators

|                                                           |          |
|-----------------------------------------------------------|----------|
| Population (millions), 2005 .....                         | 143.2    |
| Surface area (1,000 square kilometers) .....              | 17,098.2 |
| Gross domestic product (US\$ billions), 2005 .....        | 763.3    |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 11,041   |
| Real GDP growth (percent), 2005 .....                     | 6.4      |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

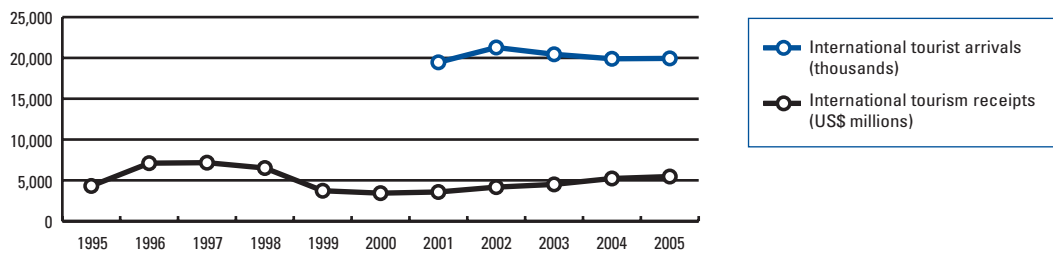
|                               |        | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|--------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 12,397 | 1.5                 | 5.1                                         |
| Employment (1,000 jobs) ..... | 863    | 1.3                 | 0.3                                         |

### T&T economy, 2006 estimates

|                               |        |     |     |
|-------------------------------|--------|-----|-----|
| GDP (US\$ millions) .....     | 66,339 | 7.8 | 6.4 |
| Employment (1,000 jobs) ..... | 4,515  | 6.6 | 1.5 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |        |
|------------------------------------------------------------|--------|
| International tourist arrivals (1,000), 2005 .....         | 19,940 |
| International tourism receipts (US\$ millions), 2005 ..... | 5,466  |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index .....</b>                                      | <b>68</b>            | <b>4.0</b>           |
| <b>T&amp;T regulatory framework .....</b>                    | <b>100</b>           | <b>3.6</b>           |
| Policy rules and regulations .....                           | 124                  | 2.7                  |
| Environmental regulation .....                               | 113                  | 3.0                  |
| Safety and security .....                                    | 99                   | 3.7                  |
| Health and hygiene .....                                     | 31                   | 5.7                  |
| Prioritization of T&T strategies .....                       | 99                   | 3.1                  |
| <b>T&amp;T business environment and infrastructure .....</b> | <b>49</b>            | <b>3.8</b>           |
| Air transport infrastructure .....                           | 21                   | 4.2                  |
| Ground transport infrastructure .....                        | 65                   | 3.5                  |
| Tourism infrastructure .....                                 | 58                   | 3.2                  |
| ICT infrastructure .....                                     | 51                   | 3.0                  |
| Price competitiveness in T&T industry .....                  | 39                   | 4.8                  |
| <b>T&amp;T human, cultural, and natural resources .....</b>  | <b>65</b>            | <b>4.7</b>           |
| Human resources .....                                        | 70                   | 5.0                  |
| Education and training .....                                 | 59                   | 4.8                  |
| Availability of qualified labor .....                        | 49                   | 4.5                  |
| Workforce wellness .....                                     | 87                   | 5.8                  |
| National tourism perception .....                            | 104                  | 4.3                  |
| Natural and cultural resources .....                         | 41                   | 4.7                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

# Russian Federation

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               |                                              | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                            | Rank/124 |
|------------------------------------------------------|----------------------------------------------|----------|------------------------------------------------------|------------------------------------------------------------|----------|
| <b>Health and hygiene</b>                            |                                              |          | <b>Policy rules and regulations</b>                  |                                                            |          |
| 4.02                                                 | Physician density .....                      | 4        | 1.01                                                 | Foreign ownership restrictions .....                       | 123      |
| 4.04                                                 | Access to improved drinking water .....      | 44       | 1.03                                                 | Rules governing foreign direct investment .....            | 121      |
| 4.03                                                 | Access to improved sanitation .....          | 50       | 1.02                                                 | Property rights .....                                      | 114      |
| <b>Prioritization of Travel &amp; Tourism</b>        |                                              |          | 1.05                                                 | Openness of bilateral Air Service Agreements .....         | 114      |
| 5.04                                                 | T&T fair attendance .....                    | 23       | 1.04                                                 | Visa requirements .....                                    | 106      |
| <b>Air transport infrastructure</b>                  |                                              |          | <b>Environmental regulation</b>                      |                                                            |          |
| 6.05                                                 | Number of operating airlines .....           | 6        | 2.03                                                 | Government prioritization of sustainable T&T .....         | 120      |
| 6.02                                                 | Available seat kilometers .....              | 16       | 2.02                                                 | Clarity and stability of environmental regulations .....   | 109      |
| 6.04                                                 | Airport density .....                        | 32       | 2.01                                                 | Stringency of environmental regulation .....               | 103      |
| <b>Ground transport infrastructure</b>               |                                              |          | <b>Safety and security</b>                           |                                                            |          |
| 7.02                                                 | Railroad infrastructure .....                | 30       | 3.02                                                 | Reliability of police services .....                       | 105      |
| <b>Tourism infrastructure</b>                        |                                              |          | 3.01                                                 | Business costs of terrorism .....                          | 103      |
| 8.02                                                 | Presence of major car rental companies ..... | 35       | 3.03                                                 | Business costs of crime and violence .....                 | 82       |
| <b>ICT infrastructure</b>                            |                                              |          | <b>Health and hygiene</b>                            |                                                            |          |
| 9.01                                                 | Extent of business Internet use .....        | 42       | 4.01                                                 | Gov't efforts to reduce health risks from pandemics .....  | 108      |
| 9.03                                                 | Telephone lines .....                        | 44       | <b>Prioritization of Travel &amp; Tourism</b>        |                                                            |          |
| <b>Price competitiveness in the T&amp;T industry</b> |                                              |          | 5.01                                                 | Government prioritization of the T&T industry .....        | 120      |
| 10.04                                                | Fuel price level .....                       | 30       | 5.03                                                 | Effectiveness of marketing and branding .....              | 113      |
| <b>Human resources</b>                               |                                              |          | 5.02                                                 | T&T government expenditure .....                           | 69       |
| 11.01                                                | Primary education enrollment .....           | 1        | <b>Air transport infrastructure</b>                  |                                                            |          |
| 11.09                                                | Malaria incidence .....                      | 1        | 6.06                                                 | International air transport network .....                  | 74       |
| 11.06                                                | Hiring and firing practices .....            | 17       | 6.01                                                 | Quality of air transport infrastructure .....              | 69       |
| 11.02                                                | Secondary education enrollment .....         | 44       | 6.03                                                 | Departures per 1,000 population .....                      | 60       |
| <b>Natural and cultural resources</b>                |                                              |          | <b>Ground transport infrastructure</b>               |                                                            |          |
| 13.05                                                | Risk of malaria and yellow fever .....       | 1        | 7.01                                                 | Road infrastructure .....                                  | 103      |
| 13.01                                                | Number of World Heritage sites .....         | 9        | 7.03                                                 | Port infrastructure .....                                  | 65       |
|                                                      |                                              |          | 7.04                                                 | Domestic transport network .....                           | 54       |
|                                                      |                                              |          | <b>Tourism infrastructure</b>                        |                                                            |          |
|                                                      |                                              |          | 8.01                                                 | Hotel rooms .....                                          | 81       |
|                                                      |                                              |          | 8.03                                                 | ATMs accepting Visa cards .....                            | 55       |
|                                                      |                                              |          | <b>ICT infrastructure</b>                            |                                                            |          |
|                                                      |                                              |          | 9.02                                                 | Internet users .....                                       | 62       |
|                                                      |                                              |          | <b>Price competitiveness in the T&amp;T industry</b> |                                                            |          |
|                                                      |                                              |          | 10.03                                                | Extent and effect of taxation .....                        | 94       |
|                                                      |                                              |          | 10.02                                                | Purchasing power parity .....                              | 60       |
|                                                      |                                              |          | 10.01                                                | Ticket taxes and airport charges .....                     | 51       |
|                                                      |                                              |          | <b>Human resources</b>                               |                                                            |          |
|                                                      |                                              |          | 11.07                                                | Ease of hiring foreign labor .....                         | 109      |
|                                                      |                                              |          | 11.05                                                | Extent of staff training .....                             | 99       |
|                                                      |                                              |          | 11.08                                                | HIV prevalence .....                                       | 90       |
|                                                      |                                              |          | 11.11                                                | Life expectancy .....                                      | 89       |
|                                                      |                                              |          | 11.10                                                | Tuberculosis incidence .....                               | 84       |
|                                                      |                                              |          | 11.04                                                | Local availability of research and training services ..... | 69       |
|                                                      |                                              |          | 11.03                                                | Quality of the educational system .....                    | 54       |
|                                                      |                                              |          | <b>National tourism perception</b>                   |                                                            |          |
|                                                      |                                              |          | 12.02                                                | Attitude toward tourists .....                             | 119      |
|                                                      |                                              |          | 12.01                                                | Tourism openness .....                                     | 63       |
|                                                      |                                              |          | 12.03                                                | Recommendation to extend business trips .....              | 54       |
|                                                      |                                              |          | <b>Natural and cultural resources</b>                |                                                            |          |
|                                                      |                                              |          | 13.02                                                | Carbon dioxide damage .....                                | 115      |
|                                                      |                                              |          | 13.04                                                | Business concern for ecosystems .....                      | 113      |
|                                                      |                                              |          | 13.03                                                | Nationally protected areas .....                           | 53       |

# Serbia and Montenegro

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 8.2   |
| Surface area (1,000 square kilometers) .....              | 102.2 |
| Gross domestic product (US\$ billions), 2005 .....        | 26.2  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 5,348 |
| Real GDP growth (percent), 2005 .....                     | 4.7   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

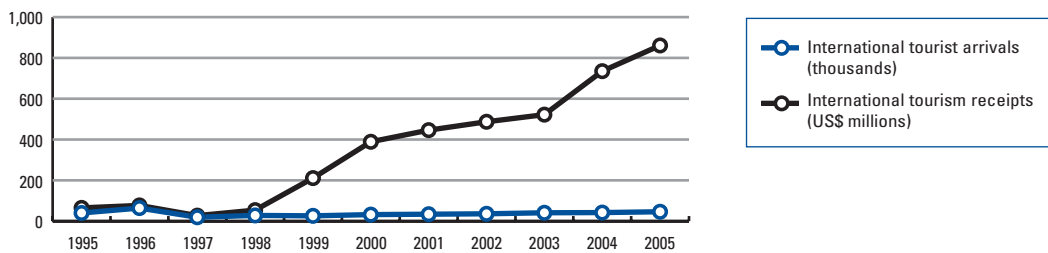
|                               |     | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-----|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 319 | 1.3                 | 4.9                                         |
| Employment (1,000 jobs) ..... | 43  | 1.2                 | 0.7                                         |

### T&T economy, 2006 estimates

|                               |       |     |     |
|-------------------------------|-------|-----|-----|
| GDP (US\$ millions) .....     | 1,216 | 5.0 | 5.3 |
| Employment (1,000 jobs) ..... | 160   | 4.5 | 1.0 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2005 .....         | 725 |
| International tourism receipts (US\$ millions), 2003 ..... | 201 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>61</b>            | <b>4.2</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>79</b>            | <b>4.0</b>           |
| Policy rules and regulations .....                           | 76                   | 4.3                  |
| Environmental regulation .....                               | 120                  | 2.7                  |
| Safety and security .....                                    | 62                   | 4.5                  |
| Health and hygiene .....                                     | 48                   | 5.1                  |
| Prioritization of T&T strategies .....                       | 92                   | 3.2                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>80</b>            | <b>3.1</b>           |
| Air transport infrastructure .....                           | 99                   | 2.3                  |
| Ground transport infrastructure .....                        | 107                  | 2.4                  |
| Tourism infrastructure .....                                 | 54                   | 3.3                  |
| ICT infrastructure .....                                     | 46                   | 3.3                  |
| Price competitiveness in T&T industry .....                  | 88                   | 4.2                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>13</b>            | <b>5.5</b>           |
| Human resources .....                                        | 47                   | 5.3                  |
| Education and training .....                                 | 65                   | 4.7                  |
| Availability of qualified labor .....                        | 50                   | 4.5                  |
| Workforce wellness .....                                     | 52                   | 6.6                  |
| National tourism perception .....                            | 19                   | 5.9                  |
| Natural and cultural resources .....                         | 26                   | 5.3                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."



# Serbia and Montenegro

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               |                                             | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                           | Rank/124 |
|------------------------------------------------------|---------------------------------------------|----------|------------------------------------------------------|-----------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                  |                                             |          | <b>Policy rules and regulations</b>                  |                                                           |          |
| 1.04                                                 | Visa requirements .....                     | 1        | 1.01                                                 | Foreign ownership restrictions.....                       | 109      |
| <b>Safety and security</b>                           |                                             |          | 1.03                                                 | Rules governing foreign direct investment .....           | 104      |
| 3.01                                                 | Business costs of terrorism .....           | 41       | 1.02                                                 | Property rights.....                                      | 89       |
| <b>Health and hygiene</b>                            |                                             |          | 1.05                                                 | Openness of bilateral Air Service Agreements .....        | 82       |
| 4.02                                                 | Physician density .....                     | 49       | <b>Environmental regulation</b>                      |                                                           |          |
| 4.04                                                 | Access to improved drinking water .....     | 49       | 2.02                                                 | Clarity and stability of environmental regulations .....  | 121      |
| 4.03                                                 | Access to improved sanitation .....         | 50       | 2.03                                                 | Government prioritization of sustainable T&T .....        | 117      |
| <b>Tourism infrastructure</b>                        |                                             |          | 2.01                                                 | Stringency of environmental regulation .....              | 115      |
| 8.02                                                 | Presence of major car rental companies..... | 35       | <b>Safety and security</b>                           |                                                           |          |
| 8.01                                                 | Hotel rooms.....                            | 49       | 3.02                                                 | Reliability of police services .....                      | 78       |
| <b>ICT infrastructure</b>                            |                                             |          | 3.03                                                 | Business costs of crime and violence.....                 | 57       |
| 9.03                                                 | Telephone lines.....                        | 38       | <b>Health and hygiene</b>                            |                                                           |          |
| <b>Price competitiveness in the T&amp;T industry</b> |                                             |          | 4.01                                                 | Gov't efforts to reduce health risks from pandemics ..... | 78       |
| 10.01                                                | Ticket taxes and airport charges.....       | 48       | <b>Prioritization of Travel &amp; Tourism</b>        |                                                           |          |
| <b>Human resources</b>                               |                                             |          | 5.01                                                 | Government prioritization of the T&T industry .....       | 101      |
| 11.09                                                | Malaria incidence.....                      | 1        | 5.03                                                 | Effectiveness of marketing and branding .....             | 98       |
| 11.03                                                | Quality of the educational system .....     | 46       | 5.04                                                 | T&T fair attendance .....                                 | 70       |
| 11.07                                                | Ease of hiring foreign labor .....          | 48       | <b>Air transport infrastructure</b>                  |                                                           |          |
| 11.08                                                | HIV prevalence .....                        | 48       | 6.06                                                 | International air transport network .....                 | 112      |
| 11.11                                                | Life expectancy .....                       | 49       | 6.01                                                 | Quality of air transport infrastructure .....             | 102      |
| <b>National tourism perception</b>                   |                                             |          | 6.02                                                 | Available seat kilometers.....                            | 81       |
| 12.02                                                | Attitude toward tourists .....              | 29       | 6.04                                                 | Airport density .....                                     | 81       |
| <b>Natural and cultural resources</b>                |                                             |          | 6.05                                                 | Number of operating airlines .....                        | 64       |
| 13.05                                                | Risk of malaria and yellow fever .....      | 1        | <b>Ground transport infrastructure</b>               |                                                           |          |
| 13.01                                                | Number of World Heritage sites .....        | 40       | 7.01                                                 | Road infrastructure .....                                 | 113      |
| 13.02                                                | Carbon dioxide damage.....                  | 42       | 7.03                                                 | Port infrastructure .....                                 | 104      |
|                                                      |                                             |          | 7.04                                                 | Domestic transport network .....                          | 95       |
|                                                      |                                             |          | 7.02                                                 | Railroad infrastructure .....                             | 91       |
|                                                      |                                             |          | <b>Tourism infrastructure</b>                        |                                                           |          |
|                                                      |                                             |          | 8.03                                                 | ATMs accepting Visa cards .....                           | 68       |
|                                                      |                                             |          | <b>ICT infrastructure</b>                            |                                                           |          |
|                                                      |                                             |          | 9.01                                                 | Extent of business Internet use .....                     | 95       |
|                                                      |                                             |          | <b>Price competitiveness in the T&amp;T industry</b> |                                                           |          |
|                                                      |                                             |          | 10.03                                                | Extent and effect of taxation.....                        | 99       |
|                                                      |                                             |          | 10.04                                                | Fuel price level .....                                    | 91       |
|                                                      |                                             |          | 10.02                                                | Purchasing power parity.....                              | 82       |
|                                                      |                                             |          | <b>Human resources</b>                               |                                                           |          |
|                                                      |                                             |          | 11.05                                                | Extent of staff training.....                             | 121      |
|                                                      |                                             |          | 11.01                                                | Primary education enrollment .....                        | 81       |
|                                                      |                                             |          | 11.06                                                | Hiring and firing practices.....                          | 61       |
|                                                      |                                             |          | 11.02                                                | Secondary education enrollment.....                       | 55       |
|                                                      |                                             |          | 11.04                                                | Local availability of research and training services..... | 52       |
|                                                      |                                             |          | 11.10                                                | Tuberculosis incidence .....                              | 52       |
|                                                      |                                             |          | <b>National tourism perception</b>                   |                                                           |          |
|                                                      |                                             |          | 12.03                                                | Recommendation to extend business trips .....             | 82       |
|                                                      |                                             |          | <b>Natural and cultural resources</b>                |                                                           |          |
|                                                      |                                             |          | 13.04                                                | Business concern for ecosystems .....                     | 111      |

# Singapore

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 4.4    |
| Surface area (1,000 square kilometers) .....              | 0.7    |
| Gross domestic product (US\$ billions), 2005 .....        | 116.8  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 28,368 |
| Real GDP growth (percent), 2005 .....                     | 6.4    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

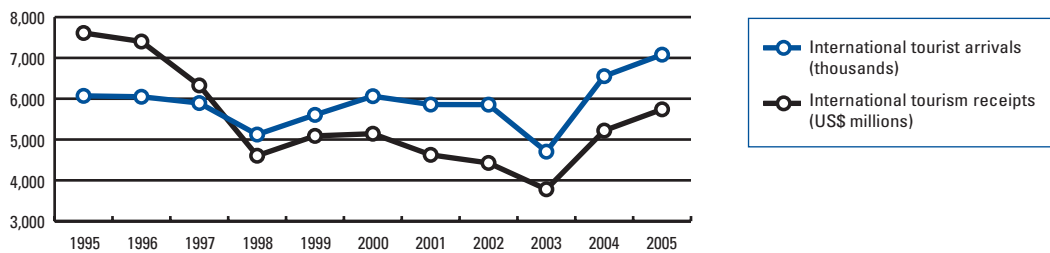
|                               |       | Percent of total | 2007-2016 annual growth (% forecast) |
|-------------------------------|-------|------------------|--------------------------------------|
| GDP (US\$ millions) .....     | 3,365 | 2.7              | 4.9                                  |
| Employment (1,000 jobs) ..... | 61    | 2.7              | 3.0                                  |

### T&T economy, 2006 estimates

|                               |        |      |     |
|-------------------------------|--------|------|-----|
| GDP (US\$ millions) .....     | 13,126 | 10.3 | 5.5 |
| Employment (1,000 jobs) ..... | 191    | 8.3  | 3.4 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 7,080 |
| International tourism receipts (US\$ millions), 2005 ..... | 5,740 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank (out of 124) | Score (1-7 scale) |
|--------------------------------------------------------------|-------------------|-------------------|
| <b>2007 Index .....</b>                                      | <b>8</b>          | <b>5.3</b>        |
| <b>T&amp;T regulatory framework .....</b>                    | <b>1</b>          | <b>5.8</b>        |
| Policy rules and regulations .....                           | 1                 | 5.8               |
| Environmental regulation .....                               | 6                 | 5.9               |
| Safety and security .....                                    | 7                 | 6.0               |
| Health and hygiene .....                                     | 29                | 5.8               |
| Prioritization of T&T strategies .....                       | 2                 | 5.6               |
| <b>T&amp;T business environment and infrastructure .....</b> | <b>11</b>         | <b>5.0</b>        |
| Air transport infrastructure .....                           | 10                | 4.9               |
| Ground transport infrastructure .....                        | 3                 | 6.5               |
| Tourism infrastructure .....                                 | 44                | 3.7               |
| ICT infrastructure .....                                     | 18                | 4.9               |
| Price competitiveness in T&T industry .....                  | 26                | 5.1               |
| <b>T&amp;T human, cultural, and natural resources .....</b>  | <b>42</b>         | <b>5.1</b>        |
| Human resources .....                                        | 2                 | 6.2               |
| Education and training .....                                 | 14                | 5.9               |
| Availability of qualified labor .....                        | 1                 | 5.9               |
| Workforce wellness .....                                     | 25                | 6.8               |
| National tourism perception .....                            | 47                | 5.2               |
| Natural and cultural resources .....                         | 79                | 3.9               |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                         | Rank/124 | COMPETITIVE DISADVANTAGES                                       | Rank/124 |
|----------------------------------------------------------------|----------|-----------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                            |          | <b>Policy rules and regulations</b>                             |          |
| 1.03 Rules governing foreign direct investment .....           | 1        | 1.05 Openness of bilateral Air Service Agreements .....         | 28       |
| 1.01 Foreign ownership restrictions.....                       | 3        | 1.04 Visa requirements .....                                    | 15       |
| <b>Environmental regulation</b>                                |          | 1.02 Property rights.....                                       | 11       |
| 2.03 Government prioritization of sustainable T&T .....        | 1        | <b>Environmental regulation</b>                                 |          |
| 2.02 Clarity and stability of environmental regulations .....  | 7        | 2.01 Stringency of environmental regulation .....               | 18       |
| <b>Safety and security</b>                                     |          | <b>Safety and security</b>                                      |          |
| 3.02 Reliability of police services .....                      | 3        | 3.01 Business costs of terrorism .....                          | 77       |
| 3.03 Business costs of crime and violence.....                 | 4        | <b>Health and hygiene</b>                                       |          |
| <b>Health and hygiene</b>                                      |          | 4.02 Physician density.....                                     | 63       |
| 4.01 Gov't efforts to reduce health risks from pandemics ..... | 1        | <b>Prioritization of Travel &amp; Tourism</b>                   |          |
| 4.03 Access to improved sanitation .....                       | 1        | 5.04 T&T fair attendance.....                                   | 48       |
| 4.04 Access to improved drinking water .....                   | 1        | <b>Air transport infrastructure</b>                             |          |
| <b>Prioritization of Travel &amp; Tourism</b>                  |          | 6.04 Airport density .....                                      | 101      |
| 5.03 Effectiveness of marketing and branding .....             | 3        | 6.05 Number of operating airlines.....                          | 22       |
| 5.01 Government prioritization of the T&T industry.....        | 6        | 6.03 Departures per 1,000 population.....                       | 18       |
| 5.02 T&T government expenditure .....                          | 8        | <b>Tourism infrastructure</b>                                   |          |
| <b>Air transport infrastructure</b>                            |          | 8.02 Presence of major car rental companies.....                | 66       |
| 6.01 Quality of air transport infrastructure .....             | 1        | 8.01 Hotel rooms.....                                           | 30       |
| 6.06 International air transport network .....                 | 2        | 8.03 ATMs accepting Visa cards .....                            | 26       |
| 6.02 Available seat kilometers.....                            | 10       | <b>ICT infrastructure</b>                                       |          |
| <b>Ground transport infrastructure</b>                         |          | 9.03 Telephone lines.....                                       | 29       |
| 7.01 Road infrastructure.....                                  | 1        | 9.01 Extent of business Internet use .....                      | 21       |
| 7.03 Port infrastructure .....                                 | 1        | 9.02 Internet users .....                                       | 12       |
| 7.04 Domestic transport network .....                          | 5        | <b>Price competitiveness in the T&amp;T industry</b>            |          |
| 7.02 Railroad infrastructure .....                             | 9        | 10.02 Purchasing power parity.....                              | 97       |
| <b>Price competitiveness in the T&amp;T industry</b>           |          | 10.04 Fuel price level .....                                    | 38       |
| 10.03 Extent and effect of taxation.....                       | 7        | 10.01 Ticket taxes and airport charges.....                     | 34       |
| <b>Human resources</b>                                         |          | <b>Human resources</b>                                          |          |
| 11.09 Malaria incidence.....                                   | 1        | 11.01 Primary education enrollment .....                        | 109      |
| 11.03 Quality of the educational system .....                  | 2        | 11.08 HIV prevalence .....                                      | 48       |
| 11.06 Hiring and firing practices.....                         | 2        | 11.10 Tuberculosis incidence .....                              | 46       |
| 11.07 Ease of hiring foreign labor .....                       | 6        | 11.02 Secondary education enrollment.....                       | 31       |
| 11.11 Life expectancy .....                                    | 8        | 11.04 Local availability of research and training services..... | 17       |
|                                                                |          | 11.05 Extent of staff training.....                             | 12       |
|                                                                |          | <b>National tourism perception</b>                              |          |
|                                                                |          | 12.03 Recommendation to extend business trips .....             | 100      |
|                                                                |          | 12.01 Tourism openness .....                                    | 23       |
|                                                                |          | 12.02 Attitude toward tourists .....                            | 12       |
|                                                                |          | <b>Natural and cultural resources</b>                           |          |
|                                                                |          | 13.01 Number of World Heritage sites .....                      | 107      |
|                                                                |          | 13.03 Nationally protected areas.....                           | 81       |
|                                                                |          | 13.02 Carbon dioxide damage.....                                | 61       |
|                                                                |          | 13.04 Business concern for ecosystems .....                     | 26       |

# Slovak Republic

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 5.4    |
| Surface area (1,000 square kilometers) .....              | 49.0   |
| Gross domestic product (US\$ billions), 2005 .....        | 47.5   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 16,041 |
| Real GDP growth (percent), 2005 .....                     | 6.1    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

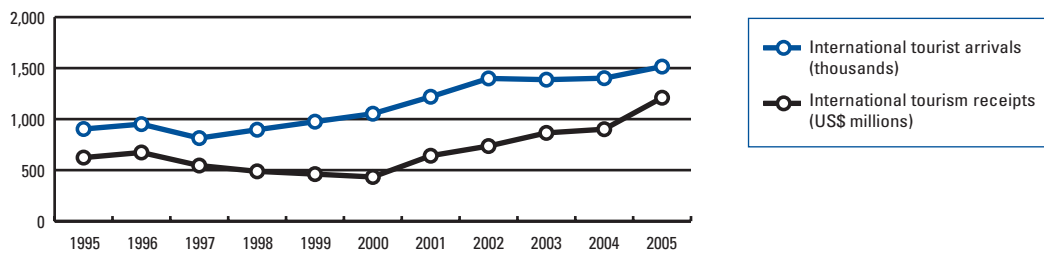
|                               |       | Percent<br>of total | 2007–2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 1,109 | 2.2                 | 4.3                                         |
| Employment (1,000 jobs) ..... | 48    | 2.1                 | 0.9                                         |

### T&T economy, 2006 estimates

|                               |       |      |     |
|-------------------------------|-------|------|-----|
| GDP (US\$ millions) .....     | 7,768 | 15.4 | 5.0 |
| Employment (1,000 jobs) ..... | 306   | 13.6 | 1.6 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 1,515 |
| International tourism receipts (US\$ millions), 2005 ..... | 1,210 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1–7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index .....</b>                                      | <b>37</b>            | <b>4.7</b>           |
| <b>T&amp;T regulatory framework .....</b>                    | <b>37</b>            | <b>4.9</b>           |
| Policy rules and regulations .....                           | 24                   | 5.3                  |
| Environmental regulation .....                               | 38                   | 4.6                  |
| Safety and security .....                                    | 24                   | 5.4                  |
| Health and hygiene .....                                     | 18                   | 6.0                  |
| Prioritization of T&T strategies .....                       | 104                  | 3.1                  |
| <b>T&amp;T business environment and infrastructure .....</b> | <b>45</b>            | <b>3.8</b>           |
| Air transport infrastructure .....                           | 97                   | 2.3                  |
| Ground transport infrastructure .....                        | 44                   | 4.0                  |
| Tourism infrastructure .....                                 | 30                   | 4.3                  |
| ICT infrastructure .....                                     | 35                   | 3.8                  |
| Price competitiveness in T&T industry .....                  | 57                   | 4.7                  |
| <b>T&amp;T human, cultural, and natural resources .....</b>  | <b>18</b>            | <b>5.4</b>           |
| Human resources .....                                        | 10                   | 5.8                  |
| Education and training .....                                 | 40                   | 5.1                  |
| Availability of qualified labor .....                        | 5                    | 5.5                  |
| Workforce wellness .....                                     | 36                   | 6.7                  |
| National tourism perception .....                            | 71                   | 4.7                  |
| Natural and cultural resources .....                         | 16                   | 5.6                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                        | Rank/124 | COMPETITIVE DISADVANTAGES                                       | Rank/124 |
|---------------------------------------------------------------|----------|-----------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                           |          | <b>Policy rules and regulations</b>                             |          |
| 1.01 Foreign ownership restrictions.....                      | 2        | 1.05 Openness of bilateral Air Service Agreements .....         | 75       |
| 1.03 Rules governing foreign direct investment .....          | 5        | 1.02 Property rights.....                                       | 45       |
| 1.04 Visa requirements .....                                  | 15       |                                                                 |          |
| <b>Environmental regulation</b>                               |          | <b>Environmental regulation</b>                                 |          |
| 2.01 Stringency of environmental regulation .....             | 30       | 2.03 Government prioritization of sustainable T&T .....         | 82       |
| 2.02 Clarity and stability of environmental regulations ..... | 33       |                                                                 |          |
| <b>Safety and security</b>                                    |          | <b>Safety and security</b>                                      |          |
| 3.01 Business costs of terrorism .....                        | 7        | 3.02 Reliability of police services .....                       | 49       |
| 3.03 Business costs of crime and violence.....                | 23       |                                                                 |          |
| <b>Health and hygiene</b>                                     |          | <b>Health and hygiene</b>                                       |          |
| 4.03 Access to improved sanitation .....                      | 1        | 4.01 Gov't efforts to reduce health risks from pandemics .....  | 47       |
| 4.04 Access to improved drinking water .....                  | 1        |                                                                 |          |
| 4.02 Physician density .....                                  | 24       | <b>Prioritization of Travel &amp; Tourism</b>                   |          |
| <b>Ground transport infrastructure</b>                        |          | 5.03 Effectiveness of marketing and branding .....              | 108      |
| 7.02 Railroad infrastructure .....                            | 23       | 5.01 Government prioritization of the T&T industry.....         | 99       |
| <b>Tourism infrastructure</b>                                 |          | 5.02 T&T government expenditure .....                           | 85       |
| 8.02 Presence of major car rental companies.....              | 1        | 5.04 T&T fair attendance .....                                  | 48       |
| 8.03 ATMs accepting Visa cards .....                          | 28       |                                                                 |          |
| <b>ICT infrastructure</b>                                     |          | <b>Air transport infrastructure</b>                             |          |
| 9.02 Internet users .....                                     | 27       | 6.05 Number of operating airlines.....                          | 104      |
| 9.01 Extent of business Internet use .....                    | 35       | 6.03 Departures per 1,000 population.....                       | 100      |
| <b>Price competitiveness in the T&amp;T industry</b>          |          | 6.02 Available seat kilometers.....                             | 97       |
| 10.03 Extent and effect of taxation.....                      | 8        | 6.01 Quality of air transport infrastructure .....              | 83       |
| <b>Human resources</b>                                        |          | 6.06 International air transport network .....                  | 77       |
| 11.08 HIV prevalence .....                                    | 1        | 6.04 Airport density .....                                      | 66       |
| 11.09 Malaria incidence.....                                  | 1        |                                                                 |          |
| 11.07 Ease of hiring foreign labor .....                      | 4        | <b>Ground transport infrastructure</b>                          |          |
| 11.06 Hiring and firing practices.....                        | 15       | 7.03 Port infrastructure .....                                  | 73       |
| 11.10 Tuberculosis incidence .....                            | 33       | 7.01 Road infrastructure.....                                   | 57       |
| <b>National tourism perception</b>                            |          | 7.04 Domestic transport network .....                           | 57       |
| 12.03 Recommendation to extend business trips .....           | 29       |                                                                 |          |
| <b>Natural and cultural resources</b>                         |          | <b>Tourism infrastructure</b>                                   |          |
| 13.05 Risk of malaria and yellow fever .....                  | 1        | 8.01 Hotel rooms.....                                           | 38       |
| 13.04 Business concern for ecosystems .....                   | 28       |                                                                 |          |
|                                                               |          | <b>ICT infrastructure</b>                                       |          |
|                                                               |          | 9.03 Telephone lines.....                                       | 56       |
|                                                               |          | <b>Price competitiveness in the T&amp;T industry</b>            |          |
|                                                               |          | 10.04 Fuel price level .....                                    | 109      |
|                                                               |          | 10.01 Ticket taxes and airport charges.....                     | 77       |
|                                                               |          | 10.02 Purchasing power parity.....                              | 67       |
|                                                               |          |                                                                 |          |
|                                                               |          | <b>Human resources</b>                                          |          |
|                                                               |          | 11.01 Primary education enrollment .....                        | 85       |
|                                                               |          | 11.03 Quality of the educational system .....                   | 49       |
|                                                               |          | 11.04 Local availability of research and training services..... | 45       |
|                                                               |          | 11.05 Extent of staff training.....                             | 45       |
|                                                               |          | 11.11 Life expectancy .....                                     | 45       |
|                                                               |          | 11.02 Secondary education enrollment.....                       | 42       |
|                                                               |          |                                                                 |          |
|                                                               |          | <b>National tourism perception</b>                              |          |
|                                                               |          | 12.02 Attitude toward tourists .....                            | 104      |
|                                                               |          | 12.01 Tourism openness .....                                    | 54       |
|                                                               |          |                                                                 |          |
|                                                               |          | <b>Natural and cultural resources</b>                           |          |
|                                                               |          | 13.02 Carbon dioxide damage.....                                | 81       |
|                                                               |          | 13.01 Number of World Heritage sites .....                      | 40       |

# Slovenia

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 2.0    |
| Surface area (1,000 square kilometers) .....              | 20.3   |
| Gross domestic product (US\$ billions), 2005 .....        | 34.0   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 21,808 |
| Real GDP growth (percent), 2005 .....                     | 3.9    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

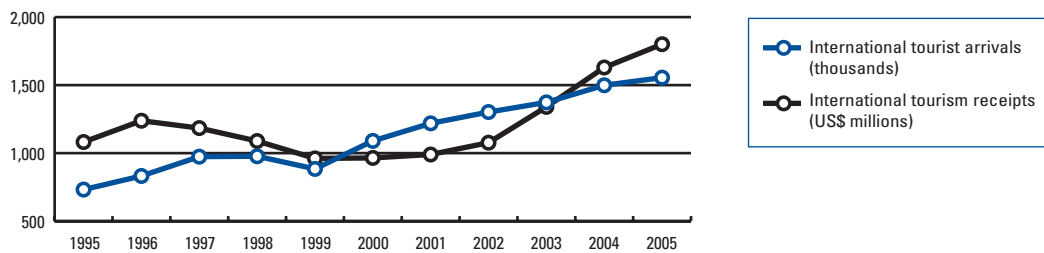
|                               |       | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 1,207 | 3.4                 | 3.4                                         |
| Employment (1,000 jobs) ..... | 38    | 4.6                 | 0.1                                         |

### T&T economy, 2006 estimates

|                               |       |      |     |
|-------------------------------|-------|------|-----|
| GDP (US\$ millions) .....     | 5,209 | 14.6 | 4.1 |
| Employment (1,000 jobs) ..... | 140   | 16.9 | 0.5 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 1,555 |
| International tourism receipts (US\$ millions), 2005 ..... | 1,801 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>44</b>            | <b>4.6</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>44</b>            | <b>4.7</b>           |
| Policy rules and regulations .....                           | 81                   | 4.3                  |
| Environmental regulation .....                               | 27                   | 5.0                  |
| Safety and security .....                                    | 33                   | 5.2                  |
| Health and hygiene .....                                     | 34                   | 5.7                  |
| Prioritization of T&T strategies .....                       | 77                   | 3.5                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>38</b>            | <b>4.1</b>           |
| Air transport infrastructure .....                           | 79                   | 2.7                  |
| Ground transport infrastructure .....                        | 37                   | 4.3                  |
| Tourism infrastructure .....                                 | 20                   | 5.2                  |
| ICT infrastructure .....                                     | 28                   | 4.5                  |
| Price competitiveness in T&T industry .....                  | 106                  | 3.9                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>53</b>            | <b>4.9</b>           |
| Human resources .....                                        | 52                   | 5.2                  |
| Education and training .....                                 | 28                   | 5.3                  |
| Availability of qualified labor .....                        | 111                  | 3.6                  |
| Workforce wellness .....                                     | 27                   | 6.8                  |
| National tourism perception .....                            | 60                   | 5.0                  |
| Natural and cultural resources .....                         | 57                   | 4.4                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                             | Rank/124 | COMPETITIVE DISADVANTAGES                                  | Rank/124 |
|--------------------------------------------------------------------|----------|------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                                |          | <b>Policy rules and regulations</b>                        |          |
| 1.04 Visa requirements .....15                                     |          | 1.05 Openness of bilateral Air Service Agreements .....115 |          |
|                                                                    |          | 1.03 Rules governing foreign direct investment .....109    |          |
| <b>Environmental regulation</b>                                    |          | 1.01 Foreign ownership restrictions .....105               |          |
| 2.02 Clarity and stability of environmental regulations .....22    |          | 1.02 Property rights .....50                               |          |
| 2.01 Stringency of environmental regulation .....23                |          |                                                            |          |
|                                                                    |          | <b>Environmental regulation</b>                            |          |
| <b>Safety and security</b>                                         |          | 2.03 Government prioritization of sustainable T&T .....57  |          |
| 3.01 Business costs of terrorism .....22                           |          |                                                            |          |
| 3.03 Business costs of crime and violence .....27                  |          | <b>Safety and security</b>                                 |          |
|                                                                    |          | 3.02 Reliability of police services .....51                |          |
| <b>Health and hygiene</b>                                          |          |                                                            |          |
| 4.03 Access to improved sanitation .....1                          |          | <b>Health and hygiene</b>                                  |          |
| 4.04 Access to improved drinking water .....1                      |          | 4.02 Physician density .....45                             |          |
| 4.01 Gov't efforts to reduce health risks from pandemics .....43   |          |                                                            |          |
|                                                                    |          | <b>Prioritization of Travel &amp; Tourism</b>              |          |
| <b>Prioritization of Travel &amp; Tourism</b>                      |          | 5.03 Effectiveness of marketing and branding .....87       |          |
| 5.02 T&T government expenditure .....38                            |          | 5.01 Government prioritization of the T&T industry .....77 |          |
|                                                                    |          | 5.04 T&T fair attendance .....70                           |          |
| <b>Air transport infrastructure</b>                                |          |                                                            |          |
| 6.03 Departures per 1,000 population .....39                       |          | <b>Air transport infrastructure</b>                        |          |
|                                                                    |          | 6.02 Available seat kilometers .....108                    |          |
| <b>Ground transport infrastructure</b>                             |          | 6.05 Number of operating airlines .....103                 |          |
| 7.01 Road infrastructure .....40                                   |          | 6.06 International air transport network .....61           |          |
| 7.02 Railroad infrastructure .....41                               |          | 6.01 Quality of air transport infrastructure .....60       |          |
|                                                                    |          | 6.04 Airport density .....60                               |          |
| <b>Tourism infrastructure</b>                                      |          |                                                            |          |
| 8.02 Presence of major car rental companies .....1                 |          | <b>Ground transport infrastructure</b>                     |          |
| 8.03 ATMs accepting Visa cards .....7                              |          | 7.04 Domestic transport network .....47                    |          |
| 8.01 Hotel rooms .....35                                           |          | 7.03 Port infrastructure .....44                           |          |
|                                                                    |          |                                                            |          |
| <b>ICT infrastructure</b>                                          |          | <b>Price competitiveness in the T&amp;T industry</b>       |          |
| 9.02 Internet users .....22                                        |          | 10.04 Fuel price level .....106                            |          |
| 9.01 Extent of business Internet use .....30                       |          | 10.03 Extent and effect of taxation .....102               |          |
| 9.03 Telephone lines .....32                                       |          | 10.02 Purchasing power parity .....88                      |          |
|                                                                    |          | 10.01 Ticket taxes and airport charges .....55             |          |
| <b>Human resources</b>                                             |          |                                                            |          |
| 11.01 Primary education enrollment .....1                          |          | <b>Human resources</b>                                     |          |
| 11.08 HIV prevalence .....1                                        |          | 11.06 Hiring and firing practices .....109                 |          |
| 11.09 Malaria incidence .....1                                     |          | 11.07 Ease of hiring foreign labor .....86                 |          |
| 11.02 Secondary education enrollment .....23                       |          | 11.03 Quality of the educational system .....52            |          |
| 11.11 Life expectancy .....29                                      |          |                                                            |          |
| 11.10 Tuberculosis incidence .....30                               |          | <b>National tourism perception</b>                         |          |
| 11.05 Extent of staff training .....32                             |          | 12.02 Attitude toward tourists .....81                     |          |
| 11.04 Local availability of research and training services .....37 |          |                                                            |          |
|                                                                    |          | <b>Natural and cultural resources</b>                      |          |
| <b>National tourism perception</b>                                 |          | 13.01 Number of World Heritage sites .....87               |          |
| 12.01 Tourism openness .....38                                     |          | 13.03 Nationally protected areas .....71                   |          |
| 12.03 Recommendation to extend business trips .....39              |          | 13.02 Carbon dioxide damage .....44                        |          |
|                                                                    |          |                                                            |          |
| <b>Natural and cultural resources</b>                              |          |                                                            |          |
| 13.05 Risk of malaria and yellow fever .....1                      |          |                                                            |          |
| 13.04 Business concern for ecosystems .....29                      |          |                                                            |          |

# South Africa

## Key indicators

|                                                           |         |
|-----------------------------------------------------------|---------|
| Population (millions), 2005 .....                         | 45.2    |
| Surface area (1,000 square kilometers) .....              | 1,219.1 |
| Gross domestic product (US\$ billions), 2005 .....        | 239.4   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 12,161  |
| Real GDP growth (percent), 2005 .....                     | 4.9     |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

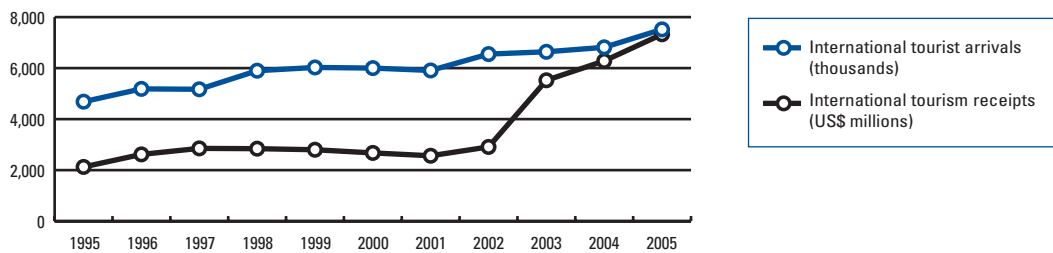
|                               |       | Percent<br>of total | 2007–2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 8,020 | 3.3                 | 4.6                                         |
| Employment (1,000 jobs) ..... | 485   | 3.4                 | 3.2                                         |

### T&T economy, 2006 estimates

|                               |        |     |     |
|-------------------------------|--------|-----|-----|
| GDP (US\$ millions) .....     | 19,851 | 8.2 | 4.7 |
| Employment (1,000 jobs) ..... | 1,083  | 7.5 | 3.3 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 7,518 |
| International tourism receipts (US\$ millions), 2005 ..... | 7,327 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1–7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>62</b>            | <b>4.2</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>59</b>            | <b>4.4</b>           |
| Policy rules and regulations .....                           | 46                   | 4.9                  |
| Environmental regulation .....                               | 28                   | 5.0                  |
| Safety and security .....                                    | 95                   | 3.8                  |
| Health and hygiene .....                                     | 82                   | 4.1                  |
| Prioritization of T&T strategies .....                       | 51                   | 4.0                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>44</b>            | <b>3.8</b>           |
| Air transport infrastructure .....                           | 30                   | 3.9                  |
| Ground transport infrastructure .....                        | 35                   | 4.3                  |
| Tourism infrastructure .....                                 | 48                   | 3.6                  |
| ICT infrastructure .....                                     | 70                   | 2.5                  |
| Price competitiveness in T&T industry .....                  | 48                   | 4.7                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>96</b>            | <b>4.4</b>           |
| Human resources .....                                        | 111                  | 3.6                  |
| Education and training .....                                 | 35                   | 5.2                  |
| Availability of qualified labor .....                        | 123                  | 2.9                  |
| Workforce wellness .....                                     | 113                  | 2.9                  |
| National tourism perception .....                            | 56                   | 5.1                  |
| Natural and cultural resources .....                         | 59                   | 4.4                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."



## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                            | Rank/124 | COMPETITIVE DISADVANTAGES                                         | Rank/124 |
|-------------------------------------------------------------------|----------|-------------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                               |          | <b>Policy rules and regulations</b>                               |          |
| 1.02 Property rights.....22                                       |          | 1.03 Rules governing foreign direct investment .....72            |          |
| 1.01 Foreign ownership restrictions.....41                        |          | 1.05 Openness of bilateral Air Service Agreements .....59         |          |
| 1.04 Visa requirements .....43                                    |          |                                                                   |          |
| <b>Environmental regulation</b>                                   |          | <b>Safety and security</b>                                        |          |
| 2.03 Government prioritization of sustainable T&T .....14         |          | 3.03 Business costs of crime and violence.....112                 |          |
| 2.02 Clarity and stability of environmental regulations .....31   |          | 3.02 Reliability of police services .....88                       |          |
| 2.01 Stringency of environmental regulation .....33               |          |                                                                   |          |
| <b>Safety and security</b>                                        |          | <b>Health and hygiene</b>                                         |          |
| 3.01 Business costs of terrorism .....43                          |          | 4.01 Gov't efforts to reduce health risks from pandemics .....101 |          |
|                                                                   |          | 4.02 Physician density .....84                                    |          |
| <b>Prioritization of Travel &amp; Tourism</b>                     |          | 4.03 Access to improved sanitation .....70                        |          |
| 5.03 Effectiveness of marketing and branding .....16              |          | 4.04 Access to improved drinking water .....65                    |          |
| 5.01 Government prioritization of the T&T industry.....20         |          |                                                                   |          |
| 5.04 T&T fair attendance.....35                                   |          | <b>Prioritization of Travel &amp; Tourism</b>                     |          |
|                                                                   |          | 5.02 T&T government expenditure .....111                          |          |
| <b>Air transport infrastructure</b>                               |          |                                                                   |          |
| 6.06 International air transport network .....17                  |          | <b>Air transport infrastructure</b>                               |          |
| 6.01 Quality of air transport infrastructure .....22              |          | 6.03 Departures per 1,000 population.....56                       |          |
| 6.02 Available seat kilometers.....22                             |          |                                                                   |          |
| 6.05 Number of operating airlines .....28                         |          | <b>Ground transport infrastructure</b>                            |          |
| 6.04 Airport density .....36                                      |          | 7.04 Domestic transport network .....56                           |          |
|                                                                   |          |                                                                   |          |
| <b>Ground transport infrastructure</b>                            |          | <b>Tourism infrastructure</b>                                     |          |
| 7.01 Road infrastructure.....34                                   |          | 8.01 Hotel rooms.....84                                           |          |
| 7.02 Railroad infrastructure .....43                              |          |                                                                   |          |
| 7.03 Port infrastructure .....43                                  |          | <b>ICT infrastructure</b>                                         |          |
|                                                                   |          | 9.03 Telephone lines.....82                                       |          |
| <b>Tourism infrastructure</b>                                     |          | 9.02 Internet users .....71                                       |          |
| 8.02 Presence of major car rental companies.....1                 |          |                                                                   |          |
| 8.03 ATMs accepting Visa cards .....41                            |          | <b>Price competitiveness in the T&amp;T industry</b>              |          |
|                                                                   |          | 10.01 Ticket taxes and airport charges.....89                     |          |
| <b>ICT infrastructure</b>                                         |          | 10.04 Fuel price level .....73                                    |          |
| 9.01 Extent of business Internet use .....49                      |          |                                                                   |          |
|                                                                   |          | <b>Human resources</b>                                            |          |
| <b>Price competitiveness in the T&amp;T industry</b>              |          | 11.07 Ease of hiring foreign labor .....121                       |          |
| 10.03 Extent and effect of taxation.....27                        |          | 11.08 HIV prevalence .....121                                     |          |
| 10.02 Purchasing power parity .....50                             |          | 11.06 Hiring and firing practices.....120                         |          |
|                                                                   |          | 11.10 Tuberculosis incidence .....120                             |          |
| <b>Human resources</b>                                            |          | 11.11 Life expectancy .....111                                    |          |
| 11.01 Primary education enrollment .....1                         |          | 11.03 Quality of the educational system .....98                   |          |
| 11.05 Extent of staff training.....26                             |          | 11.09 Malaria incidence.....79                                    |          |
| 11.04 Local availability of research and training services.....30 |          |                                                                   |          |
| 11.02 Secondary education enrollment.....50                       |          | <b>National tourism perception</b>                                |          |
|                                                                   |          | 12.01 Tourism openness .....55                                    |          |
| <b>National tourism perception</b>                                |          |                                                                   |          |
| 12.03 Recommendation to extend business trips .....2              |          | <b>Natural and cultural resources</b>                             |          |
| 12.02 Attitude toward tourists .....38                            |          | 13.02 Carbon dioxide damage.....99                                |          |
|                                                                   |          | 13.05 Risk of malaria and yellow fever .....82                    |          |
| <b>Natural and cultural resources</b>                             |          | 13.03 Nationally protected areas.....76                           |          |
| 13.04 Business concern for ecosystems .....21                     |          |                                                                   |          |
| 13.01 Number of World Heritage sites .....30                      |          |                                                                   |          |

# Spain

## Key indicators

|                                                           |         |
|-----------------------------------------------------------|---------|
| Population (millions), 2005 .....                         | 43.4    |
| Surface area (1,000 square kilometers) .....              | 505.4   |
| Gross domestic product (US\$ billions), 2005 .....        | 1,126.6 |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 26,320  |
| Real GDP growth (percent), 2005 .....                     | 3.4     |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

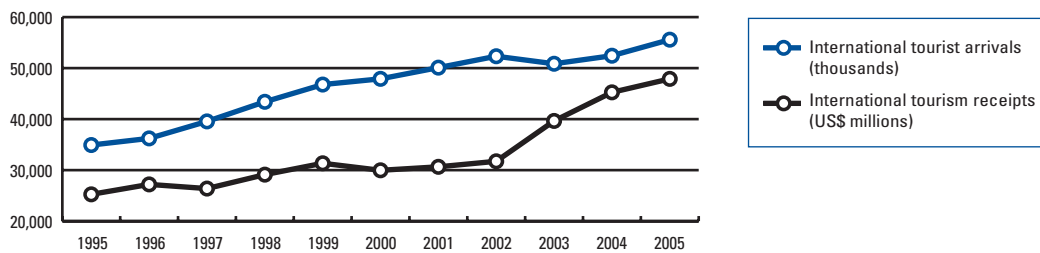
|                               |        | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|--------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 81,639 | 6.9                 | 2.8                                         |
| Employment (1,000 jobs) ..... | 1,473  | 7.5                 | 1.6                                         |

### T&T economy, 2006 estimates

|                               |         |      |     |
|-------------------------------|---------|------|-----|
| GDP (US\$ millions) .....     | 212,308 | 17.8 | 4.7 |
| Employment (1,000 jobs) ..... | 3,743   | 19.1 | 3.2 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |        |
|------------------------------------------------------------|--------|
| International tourist arrivals (1,000), 2005 .....         | 55,577 |
| International tourism receipts (US\$ millions), 2005 ..... | 47,891 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>15</b>            | <b>5.2</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>25</b>            | <b>5.2</b>           |
| Policy rules and regulations .....                           | 45                   | 4.9                  |
| Environmental regulation .....                               | 40                   | 4.5                  |
| Safety and security .....                                    | 46                   | 4.8                  |
| Health and hygiene .....                                     | 21                   | 5.9                  |
| Prioritization of T&T strategies .....                       | 3                    | 5.5                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>7</b>             | <b>5.0</b>           |
| Air transport infrastructure .....                           | 7                    | 5.2                  |
| Ground transport infrastructure .....                        | 18                   | 5.4                  |
| Tourism infrastructure .....                                 | 2                    | 6.8                  |
| ICT infrastructure .....                                     | 32                   | 3.9                  |
| Price competitiveness in T&T industry .....                  | 105                  | 3.9                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>19</b>            | <b>5.3</b>           |
| Human resources .....                                        | 45                   | 5.3                  |
| Education and training .....                                 | 34                   | 5.2                  |
| Availability of qualified labor .....                        | 89                   | 3.9                  |
| Workforce wellness .....                                     | 24                   | 6.8                  |
| National tourism perception .....                            | 55                   | 5.1                  |
| Natural and cultural resources .....                         | 17                   | 5.6                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                        |                                               | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                            | Rank/124 |
|-----------------------------------------------|-----------------------------------------------|----------|------------------------------------------------------|------------------------------------------------------------|----------|
| <b>Health and hygiene</b>                     |                                               |          | <b>Policy rules and regulations</b>                  |                                                            |          |
| 4.03                                          | Access to improved sanitation .....           | 1        | 1.05                                                 | Openness of bilateral Air Service Agreements .....         | 80       |
| 4.04                                          | Access to improved drinking water .....       | 1        | 1.03                                                 | Rules governing foreign direct investment .....            | 46       |
| <b>Prioritization of Travel &amp; Tourism</b> |                                               |          | 1.04                                                 | Visa requirements .....                                    | 43       |
| 5.04                                          | T&T fair attendance .....                     | 2        | 1.01                                                 | Foreign ownership restrictions .....                       | 33       |
| 5.03                                          | Effectiveness of marketing and branding ..... | 12       | 1.02                                                 | Property rights .....                                      | 26       |
| <b>Air transport infrastructure</b>           |                                               |          | <b>Environmental regulation</b>                      |                                                            |          |
| 6.05                                          | Number of operating airlines .....            | 7        | 2.03                                                 | Government prioritization of sustainable T&T .....         | 63       |
| 6.02                                          | Available seat kilometers .....               | 8        | 2.01                                                 | Stringency of environmental regulation .....               | 39       |
| <b>Tourism infrastructure</b>                 |                                               |          | 2.02                                                 | Clarity and stability of environmental regulations .....   | 39       |
| 8.02                                          | Presence of major car rental companies .....  | 1        | <b>Safety and security</b>                           |                                                            |          |
| 8.03                                          | ATMs accepting Visa cards .....               | 2        | 3.01                                                 | Business costs of terrorism .....                          | 98       |
| 8.01                                          | Hotel rooms .....                             | 8        | 3.03                                                 | Business costs of crime and violence .....                 | 52       |
| <b>Human resources</b>                        |                                               |          | 3.02                                                 | Reliability of police services .....                       | 22       |
| 11.01                                         | Primary education enrollment .....            | 1        | <b>Health and hygiene</b>                            |                                                            |          |
| 11.02                                         | Secondary education enrollment .....          | 1        | 4.01                                                 | Gov't efforts to reduce health risks from pandemics .....  | 64       |
| 11.09                                         | Malaria incidence .....                       | 1        | 4.02                                                 | Physician density .....                                    | 22       |
| 11.11                                         | Life expectancy .....                         | 8        | <b>Prioritization of Travel &amp; Tourism</b>        |                                                            |          |
| <b>Natural and cultural resources</b>         |                                               |          | 5.02                                                 | T&T government expenditure .....                           | 21       |
| 13.05                                         | Risk of malaria and yellow fever .....        | 1        | 5.01                                                 | Government prioritization of the T&T industry .....        | 17       |
| 13.01                                         | Number of World Heritage sites .....          | 2        | <b>Air transport infrastructure</b>                  |                                                            |          |
|                                               |                                               |          | 6.04                                                 | Airport density .....                                      | 83       |
|                                               |                                               |          | 6.03                                                 | Departures per 1,000 population .....                      | 24       |
|                                               |                                               |          | 6.01                                                 | Quality of air transport infrastructure .....              | 23       |
|                                               |                                               |          | 6.06                                                 | International air transport network .....                  | 20       |
|                                               |                                               |          | <b>Ground transport infrastructure</b>               |                                                            |          |
|                                               |                                               |          | 7.03                                                 | Port infrastructure .....                                  | 23       |
|                                               |                                               |          | 7.01                                                 | Road infrastructure .....                                  | 21       |
|                                               |                                               |          | 7.02                                                 | Railroad infrastructure .....                              | 18       |
|                                               |                                               |          | 7.04                                                 | Domestic transport network .....                           | 17       |
|                                               |                                               |          | <b>ICT infrastructure</b>                            |                                                            |          |
|                                               |                                               |          | 9.01                                                 | Extent of business Internet use .....                      | 44       |
|                                               |                                               |          | 9.02                                                 | Internet users .....                                       | 35       |
|                                               |                                               |          | 9.03                                                 | Telephone lines .....                                      | 31       |
|                                               |                                               |          | <b>Price competitiveness in the T&amp;T industry</b> |                                                            |          |
|                                               |                                               |          | 10.04                                                | Fuel price level .....                                     | 105      |
|                                               |                                               |          | 10.02                                                | Purchasing power parity .....                              | 102      |
|                                               |                                               |          | 10.03                                                | Extent and effect of taxation .....                        | 65       |
|                                               |                                               |          | 10.01                                                | Ticket taxes and airport charges .....                     | 19       |
|                                               |                                               |          | <b>Human resources</b>                               |                                                            |          |
|                                               |                                               |          | 11.06                                                | Hiring and firing practices .....                          | 113      |
|                                               |                                               |          | 11.08                                                | HIV prevalence .....                                       | 82       |
|                                               |                                               |          | 11.03                                                | Quality of the educational system .....                    | 67       |
|                                               |                                               |          | 11.07                                                | Ease of hiring foreign labor .....                         | 42       |
|                                               |                                               |          | 11.05                                                | Extent of staff training .....                             | 41       |
|                                               |                                               |          | 11.04                                                | Local availability of research and training services ..... | 35       |
|                                               |                                               |          | 11.10                                                | Tuberculosis incidence .....                               | 32       |
|                                               |                                               |          | <b>National tourism perception</b>                   |                                                            |          |
|                                               |                                               |          | 12.01                                                | Tourism openness .....                                     | 43       |
|                                               |                                               |          | 12.02                                                | Attitude toward tourists .....                             | 38       |
|                                               |                                               |          | 12.03                                                | Recommendation to extend business trips .....              | 23       |
|                                               |                                               |          | <b>Natural and cultural resources</b>                |                                                            |          |
|                                               |                                               |          | 13.03                                                | Nationally protected areas .....                           | 51       |
|                                               |                                               |          | 13.04                                                | Business concern for ecosystems .....                      | 31       |
|                                               |                                               |          | 13.02                                                | Carbon dioxide damage .....                                | 20       |

# Sri Lanka

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 19.6  |
| Surface area (1,000 square kilometers) .....              | 65.6  |
| Gross domestic product (US\$ billions), 2005 .....        | 23.5  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 4,384 |
| Real GDP growth (percent), 2005 .....                     | 6.0   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

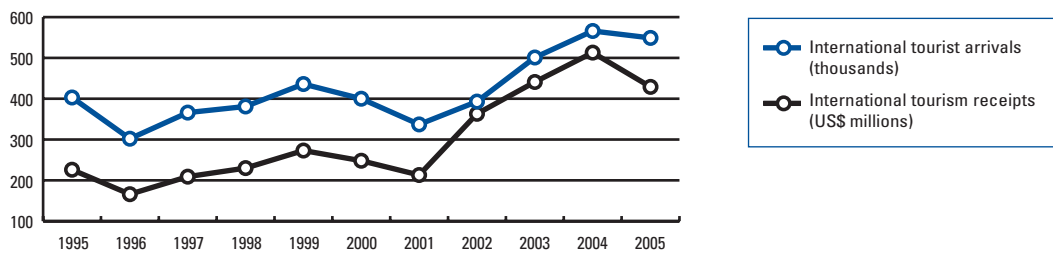
|                               |       | Percent of total | 2007–2016 annual growth (% forecast) |
|-------------------------------|-------|------------------|--------------------------------------|
| GDP (US\$ millions) .....     | 1,024 | 4.0              | 5.9                                  |
| Employment (1,000 jobs) ..... | 271   | 3.2              | 2.8                                  |

### T&T economy, 2006 estimates

|                               |       |     |     |
|-------------------------------|-------|-----|-----|
| GDP (US\$ millions) .....     | 2,477 | 9.6 | 5.5 |
| Employment (1,000 jobs) ..... | 662   | 7.9 | 2.4 |

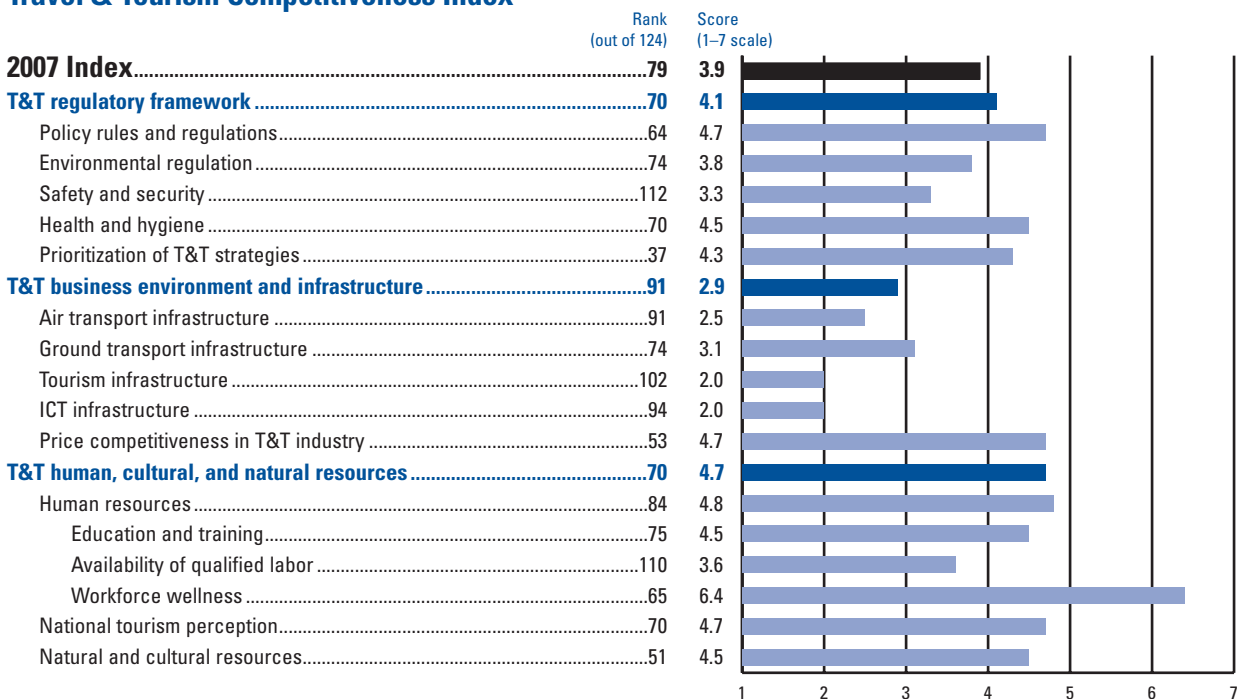
Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2005 .....         | 549 |
| International tourism receipts (US\$ millions), 2005 ..... | 429 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index



Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                     | Rank/124 | COMPETITIVE DISADVANTAGES                                          | Rank/124 |
|------------------------------------------------------------|----------|--------------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                        |          | <b>Policy rules and regulations</b>                                |          |
| 1.04 Visa requirements .....43                             |          | 1.05 Openness of bilateral Air Service Agreements .....78          |          |
| 1.03 Rules governing foreign direct investment .....46     |          | 1.01 Foreign ownership restrictions .....69                        |          |
|                                                            |          | 1.02 Property rights .....63                                       |          |
| <b>Health and hygiene</b>                                  |          | <b>Environmental regulation</b>                                    |          |
| 4.03 Access to improved sanitation .....48                 |          | 2.02 Clarity and stability of environmental regulations .....81    |          |
|                                                            |          | 2.01 Stringency of environmental regulation .....80                |          |
| <b>Prioritization of Travel &amp; Tourism</b>              |          | 2.03 Government prioritization of sustainable T&T .....54          |          |
| 5.01 Government prioritization of the T&T industry .....27 |          |                                                                    |          |
| 5.04 T&T fair attendance .....35                           |          | <b>Safety and security</b>                                         |          |
| 5.02 T&T government expenditure .....37                    |          | 3.01 Business costs of terrorism .....123                          |          |
|                                                            |          | 3.02 Reliability of police services .....93                        |          |
| <b>Price competitiveness in the T&amp;T industry</b>       |          | 3.03 Business costs of crime and violence .....74                  |          |
| 10.02 Purchasing power parity .....23                      |          |                                                                    |          |
| 10.04 Fuel price level .....23                             |          | <b>Health and hygiene</b>                                          |          |
|                                                            |          | 4.02 Physician density .....90                                     |          |
| <b>Human resources</b>                                     |          | 4.04 Access to improved drinking water .....87                     |          |
| 11.08 HIV prevalence .....1                                |          | 4.01 Gov't efforts to reduce health risks from pandemics .....55   |          |
|                                                            |          |                                                                    |          |
| <b>National tourism perception</b>                         |          | <b>Prioritization of Travel &amp; Tourism</b>                      |          |
| 12.03 Recommendation to extend business trips .....36      |          | 5.03 Effectiveness of marketing and branding .....51               |          |
| 12.02 Attitude toward tourists .....43                     |          |                                                                    |          |
|                                                            |          | <b>Air transport infrastructure</b>                                |          |
| <b>Natural and cultural resources</b>                      |          | 6.04 Airport density .....116                                      |          |
| 13.01 Number of World Heritage sites .....30               |          | 6.03 Departures per 1,000 population .....86                       |          |
| 13.03 Nationally protected areas .....30                   |          | 6.01 Quality of air transport infrastructure .....75               |          |
|                                                            |          | 6.06 International air transport network .....67                   |          |
|                                                            |          | 6.05 Number of operating airlines .....61                          |          |
|                                                            |          | 6.02 Available seat kilometers .....52                             |          |
|                                                            |          |                                                                    |          |
|                                                            |          | <b>Ground transport infrastructure</b>                             |          |
|                                                            |          | 7.04 Domestic transport network .....105                           |          |
|                                                            |          | 7.01 Road infrastructure .....81                                   |          |
|                                                            |          | 7.02 Railroad infrastructure .....61                               |          |
|                                                            |          | 7.03 Port infrastructure .....56                                   |          |
|                                                            |          |                                                                    |          |
|                                                            |          | <b>Tourism infrastructure</b>                                      |          |
|                                                            |          | 8.02 Presence of major car rental companies .....92                |          |
|                                                            |          | 8.01 Hotel rooms .....89                                           |          |
|                                                            |          | 8.03 ATMs accepting Visa cards .....81                             |          |
|                                                            |          |                                                                    |          |
|                                                            |          | <b>ICT infrastructure</b>                                          |          |
|                                                            |          | 9.02 Internet users .....103                                       |          |
|                                                            |          | 9.03 Telephone lines .....93                                       |          |
|                                                            |          | 9.01 Extent of business Internet use .....77                       |          |
|                                                            |          |                                                                    |          |
|                                                            |          | <b>Price competitiveness in the T&amp;T industry</b>               |          |
|                                                            |          | 10.01 Ticket taxes and airport charges .....115                    |          |
|                                                            |          | 10.03 Extent and effect of taxation .....73                        |          |
|                                                            |          |                                                                    |          |
|                                                            |          | <b>Human resources</b>                                             |          |
|                                                            |          | 11.07 Ease of hiring foreign labor .....102                        |          |
|                                                            |          | 11.06 Hiring and firing practices .....98                          |          |
|                                                            |          | 11.01 Primary education enrollment .....97                         |          |
|                                                            |          | 11.09 Malaria incidence .....85                                    |          |
|                                                            |          | 11.04 Local availability of research and training services .....82 |          |
|                                                            |          | 11.05 Extent of staff training .....75                             |          |
|                                                            |          | 11.03 Quality of the educational system .....70                    |          |
|                                                            |          | 11.02 Secondary education enrollment .....69                       |          |
|                                                            |          | 11.10 Tuberculosis incidence .....69                               |          |
|                                                            |          | 11.11 Life expectancy .....66                                      |          |

(Disadvantages cont'd. from bottom of right column)

&lt;&lt;&lt; (Cont'd. on bottom of left column)

# Suriname

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 0.4   |
| Surface area (1,000 square kilometers) .....              | 163.3 |
| Gross domestic product (US\$ billions), 2005 .....        | 1.3   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 5,683 |
| Real GDP growth (percent), 2005 .....                     | 5.1   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

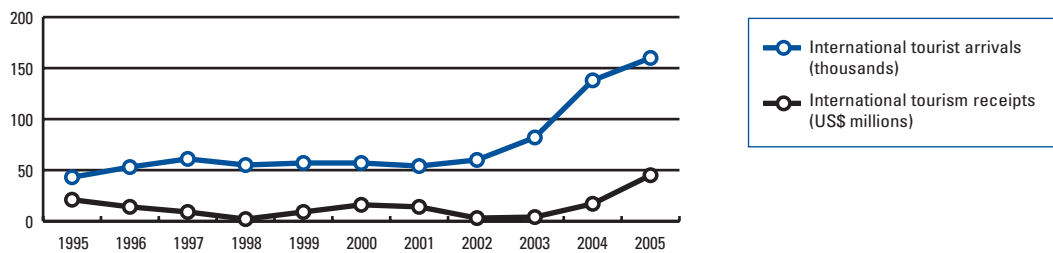
|                               |    | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|----|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 37 | 2.8                 | 3.8                                         |
| Employment (1,000 jobs) ..... | 4  | 2.7                 | 2.4                                         |

### T&T economy, 2006 estimates

|                               |    |     |     |
|-------------------------------|----|-----|-----|
| GDP (US\$ millions) .....     | 95 | 7.2 | 3.7 |
| Employment (1,000 jobs) ..... | 11 | 6.6 | 2.3 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2005 .....         | 160 |
| International tourism receipts (US\$ millions), 2005 ..... | 45  |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index .....</b>                                      | <b>108</b>           | <b>3.5</b>           |
| <b>T&amp;T regulatory framework .....</b>                    | <b>110</b>           | <b>3.4</b>           |
| Policy rules and regulations .....                           | 107                  | 3.5                  |
| Environmental regulation .....                               | 122                  | 2.7                  |
| Safety and security .....                                    | 84                   | 4.1                  |
| Health and hygiene .....                                     | 71                   | 4.5                  |
| Prioritization of T&T strategies .....                       | 116                  | 2.4                  |
| <b>T&amp;T business environment and infrastructure .....</b> | <b>87</b>            | <b>2.9</b>           |
| Air transport infrastructure .....                           | 81                   | 2.7                  |
| Ground transport infrastructure .....                        | 102                  | 2.5                  |
| Tourism infrastructure .....                                 | 59                   | 3.1                  |
| ICT infrastructure .....                                     | 82                   | 2.3                  |
| Price competitiveness in T&T industry .....                  | 93                   | 4.1                  |
| <b>T&amp;T human, cultural, and natural resources .....</b>  | <b>112</b>           | <b>4.0</b>           |
| Human resources .....                                        | 97                   | 4.5                  |
| Education and training .....                                 | 100                  | 4.0                  |
| Availability of qualified labor .....                        | 100                  | 3.7                  |
| Workforce wellness .....                                     | 91                   | 5.7                  |
| National tourism perception .....                            | 97                   | 4.4                  |
| Natural and cultural resources .....                         | 115                  | 3.2                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               |                                                    | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                            | Rank/124 |
|------------------------------------------------------|----------------------------------------------------|----------|------------------------------------------------------|------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                  |                                                    |          | <b>Policy rules and regulations</b>                  |                                                            |          |
| 1.05                                                 | Openness of bilateral Air Service Agreements ..... | 23       | 1.03                                                 | Rules governing foreign direct investment .....            | 112      |
| <b>Health and hygiene</b>                            |                                                    |          | 1.04                                                 | Visa requirements .....                                    | 100      |
| 4.03                                                 | Access to improved sanitation .....                | 42       | 1.01                                                 | Foreign ownership restrictions .....                       | 97       |
| <b>Air transport infrastructure</b>                  |                                                    |          | 1.02                                                 | Property rights .....                                      | 94       |
| 6.04                                                 | Airport density .....                              | 4        | <b>Environmental regulation</b>                      |                                                            |          |
| 6.03                                                 | Departures per 1,000 population .....              | 46       | 2.01                                                 | Stringency of environmental regulation .....               | 123      |
| <b>Price competitiveness in the T&amp;T industry</b> |                                                    |          | 2.02                                                 | Clarity and stability of environmental regulations .....   | 119      |
| 10.04                                                | Fuel price level .....                             | 36       | 2.03                                                 | Government prioritization of sustainable T&T .....         | 113      |
| <b>Human resources</b>                               |                                                    |          | <b>Safety and security</b>                           |                                                            |          |
| 11.01                                                | Primary education enrollment .....                 | 1        | 3.03                                                 | Business costs of crime and violence .....                 | 94       |
| 11.07                                                | Ease of hiring foreign labor .....                 | 46       | 3.01                                                 | Business costs of terrorism .....                          | 82       |
|                                                      |                                                    |          | 3.02                                                 | Reliability of police services .....                       | 63       |
|                                                      |                                                    |          | <b>Health and hygiene</b>                            |                                                            |          |
|                                                      |                                                    |          | 4.01                                                 | Gov't efforts to reduce health risks from pandemics .....  | 107      |
|                                                      |                                                    |          | 4.02                                                 | Physician density .....                                    | 95       |
|                                                      |                                                    |          | 4.04                                                 | Access to improved drinking water .....                    | 53       |
|                                                      |                                                    |          | <b>Prioritization of Travel &amp; Tourism</b>        |                                                            |          |
|                                                      |                                                    |          | 5.04                                                 | T&T fair attendance .....                                  | 117      |
|                                                      |                                                    |          | 5.01                                                 | Government prioritization of the T&T industry .....        | 103      |
|                                                      |                                                    |          | 5.03                                                 | Effectiveness of marketing and branding .....              | 97       |
|                                                      |                                                    |          | 5.02                                                 | T&T government expenditure .....                           | 94       |
|                                                      |                                                    |          | <b>Air transport infrastructure</b>                  |                                                            |          |
|                                                      |                                                    |          | 6.05                                                 | Number of operating airlines .....                         | 122      |
|                                                      |                                                    |          | 6.06                                                 | International air transport network .....                  | 122      |
|                                                      |                                                    |          | 6.01                                                 | Quality of air transport infrastructure .....              | 119      |
|                                                      |                                                    |          | 6.02                                                 | Available seat kilometers .....                            | 104      |
|                                                      |                                                    |          | <b>Ground transport infrastructure</b>               |                                                            |          |
|                                                      |                                                    |          | 7.04                                                 | Domestic transport network .....                           | 110      |
|                                                      |                                                    |          | 7.02                                                 | Railroad infrastructure .....                              | 100      |
|                                                      |                                                    |          | 7.03                                                 | Port infrastructure .....                                  | 93       |
|                                                      |                                                    |          | 7.01                                                 | Road infrastructure .....                                  | 88       |
|                                                      |                                                    |          | <b>Tourism infrastructure</b>                        |                                                            |          |
|                                                      |                                                    |          | 8.02                                                 | Presence of major car rental companies .....               | 66       |
|                                                      |                                                    |          | 8.01                                                 | Hotel rooms .....                                          | 62       |
|                                                      |                                                    |          | <b>ICT infrastructure</b>                            |                                                            |          |
|                                                      |                                                    |          | 9.01                                                 | Extent of business Internet use .....                      | 108      |
|                                                      |                                                    |          | 9.02                                                 | Internet users .....                                       | 78       |
|                                                      |                                                    |          | 9.03                                                 | Telephone lines .....                                      | 62       |
|                                                      |                                                    |          | <b>Price competitiveness in the T&amp;T industry</b> |                                                            |          |
|                                                      |                                                    |          | 10.03                                                | Extent and effect of taxation .....                        | 112      |
|                                                      |                                                    |          | 10.01                                                | Ticket taxes and airport charges .....                     | 97       |
|                                                      |                                                    |          | <b>Human resources</b>                               |                                                            |          |
|                                                      |                                                    |          | 11.06                                                | Hiring and firing practices .....                          | 121      |
|                                                      |                                                    |          | 11.03                                                | Quality of the educational system .....                    | 116      |
|                                                      |                                                    |          | 11.04                                                | Local availability of research and training services ..... | 115      |
|                                                      |                                                    |          | 11.05                                                | Extent of staff training .....                             | 109      |
|                                                      |                                                    |          | 11.09                                                | Malaria incidence .....                                    | 105      |
|                                                      |                                                    |          | 11.08                                                | HIV prevalence .....                                       | 98       |
|                                                      |                                                    |          | 11.11                                                | Life expectancy .....                                      | 83       |
|                                                      |                                                    |          | 11.02                                                | Secondary education enrollment .....                       | 82       |
|                                                      |                                                    |          | 11.10                                                | Tuberculosis incidence .....                               | 71       |

(Disadvantages cont'd. from bottom of right column)

| COMPETITIVE DISADVANTAGES             |                                               | Rank/124 |
|---------------------------------------|-----------------------------------------------|----------|
| <b>National tourism perception</b>    |                                               |          |
| 12.03                                 | Recommendation to extend business trips ..... | 93       |
| 12.02                                 | Attitude toward tourists .....                | 84       |
| 12.01                                 | Tourism openness .....                        | 59       |
| <b>Natural and cultural resources</b> |                                               |          |
| 13.04                                 | Business concern for ecosystems .....         | 116      |
| 13.02                                 | Carbon dioxide damage .....                   | 112      |
| 13.05                                 | Risk of malaria and yellow fever .....        | 96       |
| 13.01                                 | Number of World Heritage sites .....          | 73       |

<<< (Cont'd. on bottom of left column)

# Sweden

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 9.0    |
| Surface area (1,000 square kilometers) .....              | 450.3  |
| Gross domestic product (US\$ billions), 2005 .....        | 358.8  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 29,926 |
| Real GDP growth (percent), 2005 .....                     | 2.7    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

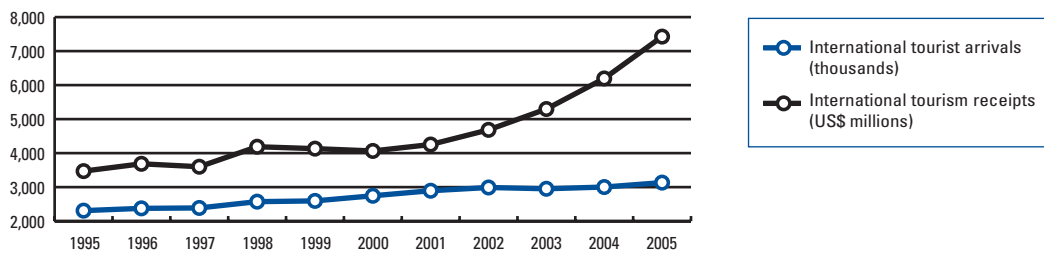
|                               |       | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 9,790 | 2.7                 | 3.1                                         |
| Employment (1,000 jobs) ..... | 118   | 2.8                 | 1.0                                         |

### T&T economy, 2006 estimates

|                               |        |     |     |
|-------------------------------|--------|-----|-----|
| GDP (US\$ millions) .....     | 28,938 | 7.9 | 3.1 |
| Employment (1,000 jobs) ..... | 344    | 8.0 | 1.0 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 3,133 |
| International tourism receipts (US\$ millions), 2005 ..... | 7,427 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>17</b>            | <b>5.1</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>19</b>            | <b>5.2</b>           |
| Policy rules and regulations .....                           | 23                   | 5.3                  |
| Environmental regulation .....                               | 7                    | 5.9                  |
| Safety and security .....                                    | 15                   | 5.6                  |
| Health and hygiene .....                                     | 13                   | 6.2                  |
| Prioritization of T&T strategies .....                       | 93                   | 3.2                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>13</b>            | <b>4.9</b>           |
| Air transport infrastructure .....                           | 11                   | 4.9                  |
| Ground transport infrastructure .....                        | 12                   | 5.7                  |
| Tourism infrastructure .....                                 | 27                   | 4.4                  |
| ICT infrastructure .....                                     | 1                    | 6.3                  |
| Price competitiveness in T&T industry .....                  | 122                  | 3.1                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>27</b>            | <b>5.3</b>           |
| Human resources .....                                        | 31                   | 5.4                  |
| Education and training .....                                 | 8                    | 6.1                  |
| Availability of qualified labor .....                        | 118                  | 3.3                  |
| Workforce wellness .....                                     | 1                    | 7.0                  |
| National tourism perception .....                            | 99                   | 4.4                  |
| Natural and cultural resources .....                         | 8                    | 6.0                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."



## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                          | Rank/124 | COMPETITIVE DISADVANTAGES                                      | Rank/124 |
|-----------------------------------------------------------------|----------|----------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                             |          | <b>Policy rules and regulations</b>                            |          |
| 1.01 Foreign ownership restrictions.....                        | 9        | 1.05 Openness of bilateral Air Service Agreements .....        | 72       |
| 1.03 Rules governing foreign direct investment .....            | 15       | 1.04 Visa requirements .....                                   | 43       |
| 1.02 Property rights.....                                       | 16       |                                                                |          |
| <b>Environmental regulation</b>                                 |          | <b>Environmental regulation</b>                                |          |
| 2.01 Stringency of environmental regulation .....               | 4        | 2.03 Government prioritization of sustainable T&T .....        | 35       |
| 2.02 Clarity and stability of environmental regulations .....   | 6        |                                                                |          |
| <b>Health and hygiene</b>                                       |          | <b>Safety and security</b>                                     |          |
| 4.03 Access to improved sanitation .....                        | 1        | 3.02 Reliability of police services .....                      | 27       |
| 4.04 Access to improved drinking water .....                    | 1        | 3.01 Business costs of terrorism .....                         | 26       |
|                                                                 |          | 3.03 Business costs of crime and violence.....                 | 18       |
| <b>Air transport infrastructure</b>                             |          | <b>Health and hygiene</b>                                      |          |
| 6.03 Departures per 1,000 population.....                       | 12       | 4.02 Physician density.....                                    | 23       |
|                                                                 |          | 4.01 Gov't efforts to reduce health risks from pandemics ..... | 19       |
| <b>Ground transport infrastructure</b>                          |          | <b>Prioritization of Travel &amp; Tourism</b>                  |          |
| 7.02 Railroad infrastructure .....                              | 11       | 5.02 T&T government expenditure .....                          | 82       |
| 7.03 Port infrastructure .....                                  | 12       | 5.01 Government prioritization of the T&T industry.....        | 80       |
| 7.04 Domestic transport network .....                           | 12       | 5.03 Effectiveness of marketing and branding .....             | 78       |
|                                                                 |          | 5.04 T&T fair attendance .....                                 | 70       |
| <b>ICT infrastructure</b>                                       |          | <b>Air transport infrastructure</b>                            |          |
| 9.02 Internet users .....                                       | 2        | 6.02 Available seat kilometers.....                            | 34       |
| 9.03 Telephone lines.....                                       | 2        | 6.06 International air transport network .....                 | 23       |
| 9.01 Extent of business Internet use .....                      | 4        | 6.01 Quality of air transport infrastructure .....             | 21       |
|                                                                 |          | 6.04 Airport density .....                                     | 20       |
| <b>Human resources</b>                                          |          | 6.05 Number of operating airlines.....                         | 18       |
| 11.02 Secondary education enrollment.....                       | 1        |                                                                |          |
| 11.09 Malaria incidence.....                                    | 1        | <b>Ground transport infrastructure</b>                         |          |
| 11.10 Tuberculosis incidence .....                              | 2        | 7.01 Road infrastructure.....                                  | 18       |
| 11.05 Extent of staff training.....                             | 3        |                                                                |          |
| 11.11 Life expectancy .....                                     | 3        | <b>Tourism infrastructure</b>                                  |          |
| 11.04 Local availability of research and training services..... | 8        | 8.02 Presence of major car rental companies.....               | 35       |
|                                                                 |          | 8.03 ATMs accepting Visa cards .....                           | 34       |
| <b>Natural and cultural resources</b>                           |          | 8.01 Hotel rooms.....                                          | 21       |
| 13.05 Risk of malaria and yellow fever .....                    | 1        |                                                                |          |
| 13.04 Business concern for ecosystems .....                     | 3        | <b>Price competitiveness in the T&amp;T industry</b>           |          |
| 13.02 Carbon dioxide damage.....                                | 5        | 10.04 Fuel price level .....                                   | 120      |
| 13.01 Number of World Heritage sites .....                      | 14       | 10.03 Extent and effect of taxation.....                       | 117      |
|                                                                 |          | 10.02 Purchasing power parity.....                             | 116      |
|                                                                 |          | 10.01 Ticket taxes and airport charges.....                    | 33       |
|                                                                 |          | <b>Human resources</b>                                         |          |
|                                                                 |          | 11.06 Hiring and firing practices.....                         | 123      |
|                                                                 |          | 11.07 Ease of hiring foreign labor .....                       | 87       |
|                                                                 |          | 11.01 Primary education enrollment .....                       | 84       |
|                                                                 |          | 11.08 HIV prevalence .....                                     | 25       |
|                                                                 |          | 11.03 Quality of the educational system .....                  | 24       |
|                                                                 |          | <b>National tourism perception</b>                             |          |
|                                                                 |          | 12.03 Recommendation to extend business trips .....            | 109      |
|                                                                 |          | 12.02 Attitude toward tourists .....                           | 57       |
|                                                                 |          | 12.01 Tourism openness .....                                   | 51       |
|                                                                 |          | <b>Natural and cultural resources</b>                          |          |
|                                                                 |          | 13.03 Nationally protected areas.....                          | 48       |

# Switzerland

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 7.4    |
| Surface area (1,000 square kilometers) .....              | 41.3   |
| Gross domestic product (US\$ billions), 2005 .....        | 367.6  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 32,571 |
| Real GDP growth (percent), 2005 .....                     | 1.9    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

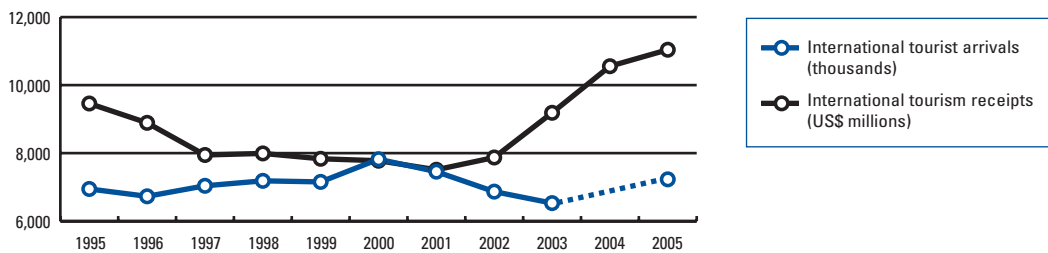
|                               |        | Percent of total | 2007–2016 annual growth (% forecast) |
|-------------------------------|--------|------------------|--------------------------------------|
| GDP (US\$ millions) .....     | 23,185 | 6.2              | 2.1                                  |
| Employment (1,000 jobs) ..... | 342    | 8.1              | 1.6                                  |

### T&T economy, 2006 estimates

|                               |        |      |     |
|-------------------------------|--------|------|-----|
| GDP (US\$ millions) .....     | 53,850 | 14.3 | 2.1 |
| Employment (1,000 jobs) ..... | 759    | 18.0 | 1.5 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |        |
|------------------------------------------------------------|--------|
| International tourist arrivals (1,000), 2005 .....         | 7,229  |
| International tourism receipts (US\$ millions), 2005 ..... | 11,040 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank (out of 124) | Score (1–7 scale) |
|--------------------------------------------------------------|-------------------|-------------------|
| <b>2007 Index</b> .....                                      | <b>1</b>          | <b>5.7</b>        |
| <b>T&amp;T regulatory framework</b> .....                    | <b>2</b>          | <b>5.8</b>        |
| Policy rules and regulations .....                           | 21                | 5.3               |
| Environmental regulation .....                               | 4                 | 6.0               |
| Safety and security .....                                    | 5                 | 6.1               |
| Health and hygiene .....                                     | 8                 | 6.3               |
| Prioritization of T&T strategies .....                       | 8                 | 5.3               |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>2</b>          | <b>5.4</b>        |
| Air transport infrastructure .....                           | 9                 | 5.0               |
| Ground transport infrastructure .....                        | 5                 | 6.4               |
| Tourism infrastructure .....                                 | 4                 | 6.5               |
| ICT infrastructure .....                                     | 9                 | 5.5               |
| Price competitiveness in T&T industry .....                  | 115               | 3.5               |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>2</b>          | <b>5.8</b>        |
| Human resources .....                                        | 1                 | 6.3               |
| Education and training .....                                 | 1                 | 6.3               |
| Availability of qualified labor .....                        | 7                 | 5.5               |
| Workforce wellness .....                                     | 6                 | 6.9               |
| National tourism perception .....                            | 62                | 4.9               |
| Natural and cultural resources .....                         | 6                 | 6.3               |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                 |                                                           | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                           | Rank/124 |
|----------------------------------------|-----------------------------------------------------------|----------|------------------------------------------------------|-----------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>    |                                                           |          | <b>Policy rules and regulations</b>                  |                                                           |          |
| 1.02                                   | Property rights.....                                      | 4        | 1.05                                                 | Openness of bilateral Air Service Agreements .....        | 61       |
| <b>Environmental regulation</b>        |                                                           |          | 1.04                                                 | Visa requirements .....                                   | 43       |
| 2.02                                   | Clarity and stability of environmental regulations .....  | 2        | 1.01                                                 | Foreign ownership restrictions.....                       | 23       |
| 2.01                                   | Stringency of environmental regulation .....              | 5        | 1.03                                                 | Rules governing foreign direct investment .....           | 16       |
| <b>Safety and security</b>             |                                                           |          | <b>Environmental regulation</b>                      |                                                           |          |
| 3.02                                   | Reliability of police services .....                      | 5        | 2.03                                                 | Government prioritization of sustainable T&T .....        | 12       |
| 3.03                                   | Business costs of crime and violence.....                 | 7        | <b>Safety and security</b>                           |                                                           |          |
| <b>Health and hygiene</b>              |                                                           |          | 3.01                                                 | Business costs of terrorism .....                         | 40       |
| 4.03                                   | Access to improved sanitation .....                       | 1        | <b>Health and hygiene</b>                            |                                                           |          |
| 4.04                                   | Access to improved drinking water .....                   | 1        | 4.01                                                 | Gov't efforts to reduce health risks from pandemics ..... | 20       |
| <b>Air transport infrastructure</b>    |                                                           |          | 4.02                                                 | Physician density.....                                    | 11       |
| 6.03                                   | Departures per 1,000 population.....                      | 6        | <b>Prioritization of Travel &amp; Tourism</b>        |                                                           |          |
| 6.05                                   | Number of operating airlines.....                         | 10       | 5.01                                                 | Government prioritization of the T&T industry.....        | 31       |
| <b>Ground transport infrastructure</b> |                                                           |          | 5.03                                                 | Effectiveness of marketing and branding .....             | 24       |
| 7.02                                   | Railroad infrastructure .....                             | 1        | 5.02                                                 | T&T government expenditure .....                          | 15       |
| 7.04                                   | Domestic transport network .....                          | 2        | 5.04                                                 | T&T fair attendance.....                                  | 15       |
| 7.01                                   | Road infrastructure.....                                  | 3        | <b>Air transport infrastructure</b>                  |                                                           |          |
| <b>Tourism infrastructure</b>          |                                                           |          | 6.04                                                 | Airport density .....                                     | 50       |
| 8.02                                   | Presence of major car rental companies.....               | 1        | 6.02                                                 | Available seat kilometers.....                            | 26       |
| 8.03                                   | ATMs accepting Visa cards .....                           | 6        | 6.06                                                 | International air transport network .....                 | 15       |
| 8.01                                   | Hotel rooms.....                                          | 7        | 6.01                                                 | Quality of air transport infrastructure .....             | 14       |
| <b>ICT infrastructure</b>              |                                                           |          | <b>Ground transport infrastructure</b>               |                                                           |          |
| 9.03                                   | Telephone lines.....                                      | 3        | 7.03                                                 | Port infrastructure .....                                 | 21       |
| 9.01                                   | Extent of business Internet use .....                     | 7        | <b>ICT infrastructure</b>                            |                                                           |          |
| <b>Human resources</b>                 |                                                           |          | 9.02                                                 | Internet users .....                                      | 24       |
| 11.01                                  | Primary education enrollment .....                        | 1        | <b>Price competitiveness in the T&amp;T industry</b> |                                                           |          |
| 11.05                                  | Extent of staff training.....                             | 1        | 10.02                                                | Purchasing power parity.....                              | 121      |
| 11.09                                  | Malaria incidence.....                                    | 1        | 10.04                                                | Fuel price level .....                                    | 120      |
| 11.11                                  | Life expectancy .....                                     | 3        | 10.01                                                | Ticket taxes and airport charges.....                     | 59       |
| 11.03                                  | Quality of the educational system .....                   | 4        | 10.03                                                | Extent and effect of taxation.....                        | 15       |
| 11.04                                  | Local availability of research and training services..... | 4        | <b>Human resources</b>                               |                                                           |          |
| 11.06                                  | Hiring and firing practices.....                          | 4        | 11.08                                                | HIV prevalence .....                                      | 69       |
| 11.10                                  | Tuberculosis incidence .....                              | 10       | 11.02                                                | Secondary education enrollment.....                       | 43       |
| <b>Natural and cultural resources</b>  |                                                           |          | 11.07                                                | Ease of hiring foreign labor .....                        | 26       |
| 13.05                                  | Risk of malaria and yellow fever .....                    | 1        | <b>National tourism perception</b>                   |                                                           |          |
| 13.02                                  | Carbon dioxide damage.....                                | 2        | 12.02                                                | Attitude toward tourists .....                            | 59       |
| 13.04                                  | Business concern for ecosystems .....                     | 6        | 12.01                                                | Tourism openness .....                                    | 52       |
| 13.03                                  | Nationally protected areas.....                           | 8        | 12.03                                                | Recommendation to extend business trips .....             | 33       |
|                                        |                                                           |          | <b>Natural and cultural resources</b>                |                                                           |          |
|                                        |                                                           |          | 13.01                                                | Number of World Heritage sites .....                      | 40       |

# Taiwan, China

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 22.9   |
| Surface area (1,000 square kilometers) .....              | 36.2   |
| Gross domestic product (US\$ billions), 2005 .....        | 346.2  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 27,721 |
| Real GDP growth (percent), 2005 .....                     | 4.1    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

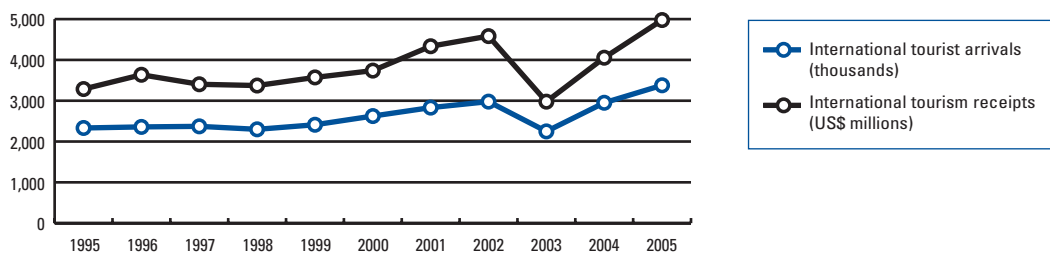
|                               |       | Percent of total | 2007-2016 annual growth (% forecast) |
|-------------------------------|-------|------------------|--------------------------------------|
| GDP (US\$ millions) .....     | 4,681 | 1.2              | 3.4                                  |
| Employment (1,000 jobs) ..... | 170   | 1.7              | 0.6                                  |

### T&T economy, 2006 estimates

|                               |        |     |     |
|-------------------------------|--------|-----|-----|
| GDP (US\$ millions) .....     | 17,718 | 4.6 | 4.3 |
| Employment (1,000 jobs) ..... | 529    | 5.2 | 1.3 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 3,378 |
| International tourism receipts (US\$ millions), 2005 ..... | 4,977 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank (out of 124) | Score (1-7 scale) |
|--------------------------------------------------------------|-------------------|-------------------|
| <b>2007 Index</b> .....                                      | <b>30</b>         | <b>4.8</b>        |
| <b>T&amp;T regulatory framework</b> .....                    | <b>45</b>         | <b>4.7</b>        |
| Policy rules and regulations .....                           | 8                 | 5.7               |
| Environmental regulation .....                               | 21                | 5.2               |
| Safety and security .....                                    | 32                | 5.2               |
| Health and hygiene .....                                     | 85                | 4.1               |
| Prioritization of T&T strategies .....                       | 78                | 3.5               |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>28</b>         | <b>4.4</b>        |
| Air transport infrastructure .....                           | 52                | 3.2               |
| Ground transport infrastructure .....                        | 14                | 5.7               |
| Tourism infrastructure .....                                 | 74                | 2.7               |
| ICT infrastructure .....                                     | 14                | 5.3               |
| Price competitiveness in T&T industry .....                  | 15                | 5.3               |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>23</b>         | <b>5.3</b>        |
| Human resources .....                                        | 15                | 5.7               |
| Education and training .....                                 | 17                | 5.9               |
| Availability of qualified labor .....                        | 47                | 4.6               |
| Workforce wellness .....                                     | 41                | 6.6               |
| National tourism perception .....                            | 17                | 6.0               |
| Natural and cultural resources .....                         | 63                | 4.3               |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               |                                                            | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                     | Rank/124 |
|------------------------------------------------------|------------------------------------------------------------|----------|------------------------------------------------------|-----------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                  |                                                            |          | <b>Policy rules and regulations</b>                  |                                                     |          |
| 1.04                                                 | Visa requirements .....                                    | 15       | 1.02                                                 | Property rights .....                               | 39       |
| <b>Environmental regulation</b>                      |                                                            |          | 1.01                                                 | Foreign ownership restrictions .....                | 36       |
| 2.01                                                 | Stringency of environmental regulation .....               | 20       | 1.03                                                 | Rules governing foreign direct investment .....     | 35       |
| 2.02                                                 | Clarity and stability of environmental regulations .....   | 20       | <b>Environmental regulation</b>                      |                                                     |          |
| <b>Health and hygiene</b>                            |                                                            |          | 2.03                                                 | Government prioritization of sustainable T&T .....  | 42       |
| 4.01                                                 | Gov't efforts to reduce health risks from pandemics .....  | 27       | <b>Safety and security</b>                           |                                                     |          |
| <b>Air transport infrastructure</b>                  |                                                            |          | 3.01                                                 | Business costs of terrorism .....                   | 52       |
| 6.01                                                 | Quality of air transport infrastructure .....              | 20       | 3.02                                                 | Reliability of police services .....                | 36       |
| 6.02                                                 | Available seat kilometers .....                            | 23       | 3.03                                                 | Business costs of crime and violence .....          | 30       |
| <b>Ground transport infrastructure</b>               |                                                            |          | <b>Health and hygiene</b>                            |                                                     |          |
| 7.02                                                 | Railroad infrastructure .....                              | 12       | 4.02                                                 | Physician density .....                             | 61       |
| 7.01                                                 | Road infrastructure .....                                  | 13       | <b>Prioritization of Travel &amp; Tourism</b>        |                                                     |          |
| 7.04                                                 | Domestic transport network .....                           | 18       | 5.02                                                 | T&T government expenditure .....                    | 94       |
| 7.03                                                 | Port infrastructure .....                                  | 20       | 5.01                                                 | Government prioritization of the T&T industry ..... | 74       |
| <b>Tourism infrastructure</b>                        |                                                            |          | 5.03                                                 | Effectiveness of marketing and branding .....       | 60       |
| 8.03                                                 | ATMs accepting Visa cards .....                            | 10       | 5.04                                                 | T&T fair attendance .....                           | 48       |
| <b>ICT infrastructure</b>                            |                                                            |          | <b>Air transport infrastructure</b>                  |                                                     |          |
| 9.03                                                 | Telephone lines .....                                      | 9        | 6.04                                                 | Airport density .....                               | 104      |
| 9.02                                                 | Internet users .....                                       | 14       | 6.03                                                 | Departures per 1,000 population .....               | 99       |
| 9.01                                                 | Extent of business Internet use .....                      | 18       | 6.05                                                 | Number of operating airlines .....                  | 51       |
| <b>Price competitiveness in the T&amp;T industry</b> |                                                            |          | 6.06                                                 | International air transport network .....           | 43       |
| 10.01                                                | Ticket taxes and airport charges .....                     | 13       | <b>Tourism infrastructure</b>                        |                                                     |          |
| 10.03                                                | Extent and effect of taxation .....                        | 20       | 8.02                                                 | Presence of major car rental companies .....        | 113      |
| <b>Human resources</b>                               |                                                            |          | 8.01                                                 | Hotel rooms .....                                   | 86       |
| 11.01                                                | Primary education enrollment .....                         | 1        | <b>Price competitiveness in the T&amp;T industry</b> |                                                     |          |
| 11.08                                                | HIV prevalence .....                                       | 1        | 10.02                                                | Purchasing power parity .....                       | 70       |
| 11.03                                                | Quality of the educational system .....                    | 9        | 10.04                                                | Fuel price level .....                              | 38       |
| 11.05                                                | Extent of staff training .....                             | 19       | <b>Human resources</b>                               |                                                     |          |
| 11.04                                                | Local availability of research and training services ..... | 21       | 11.07                                                | Ease of hiring foreign labor .....                  | 75       |
| 11.02                                                | Secondary education enrollment .....                       | 27       | 11.10                                                | Tuberculosis incidence .....                        | 60       |
| 11.06                                                | Hiring and firing practices .....                          | 27       | 11.11                                                | Life expectancy .....                               | 35       |
| <b>Natural and cultural resources</b>                |                                                            |          | <b>National tourism perception</b>                   |                                                     |          |
| 13.05                                                | Risk of malaria and yellow fever .....                     | 1        | 12.03                                                | Recommendation to extend business trips .....       | 65       |
| 13.03                                                | Nationally protected areas .....                           | 17       | 12.02                                                | Attitude toward tourists .....                      | 56       |
|                                                      |                                                            |          | <b>Natural and cultural resources</b>                |                                                     |          |
|                                                      |                                                            |          | 13.01                                                | Number of World Heritage sites .....                | 107      |
|                                                      |                                                            |          | 13.04                                                | Business concern for ecosystems .....               | 37       |

# Tajikistan

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 6.5   |
| Surface area (1,000 square kilometers) .....              | 142.6 |
| Gross domestic product (US\$ billions), 2005 .....        | 2.3   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 1,388 |
| Real GDP growth (percent), 2005 .....                     | 6.7   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

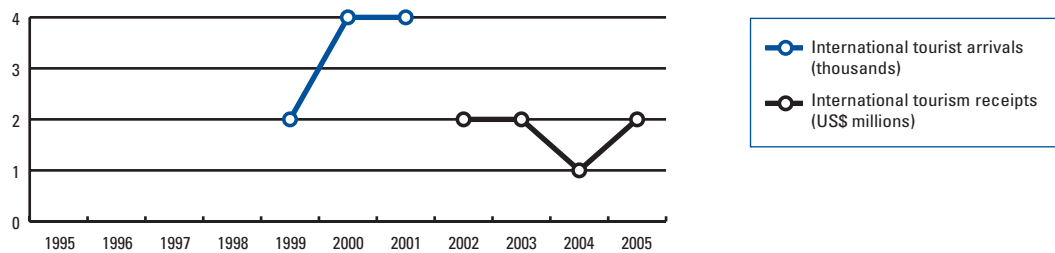
|                               |     | Percent<br>of total | 2007–2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-----|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | n/a | n/a                 | n/a                                         |
| Employment (1,000 jobs) ..... | n/a | n/a                 | n/a                                         |

### T&T economy, 2006 estimates

|                               |     |     |     |
|-------------------------------|-----|-----|-----|
| GDP (US\$ millions) .....     | n/a | n/a | n/a |
| Employment (1,000 jobs) ..... | n/a | n/a | n/a |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |   |
|------------------------------------------------------------|---|
| International tourist arrivals (1,000), 2001 .....         | 4 |
| International tourism receipts (US\$ millions), 2005 ..... | 2 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1–7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>110</b>           | <b>3.5</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>97</b>            | <b>3.7</b>           |
| Policy rules and regulations .....                           | 102                  | 3.7                  |
| Environmental regulation .....                               | 89                   | 3.5                  |
| Safety and security .....                                    | 78                   | 4.1                  |
| Health and hygiene .....                                     | 92                   | 4.0                  |
| Prioritization of T&T strategies .....                       | 106                  | 3.0                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>112</b>           | <b>2.5</b>           |
| Air transport infrastructure .....                           | 109                  | 2.1                  |
| Ground transport infrastructure .....                        | 94                   | 2.6                  |
| Tourism infrastructure .....                                 | 124                  | 1.0                  |
| ICT infrastructure .....                                     | 101                  | 1.9                  |
| Price competitiveness in T&T industry .....                  | 27                   | 5.1                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>105</b>           | <b>4.2</b>           |
| Human resources .....                                        | 87                   | 4.8                  |
| Education and training .....                                 | 87                   | 4.2                  |
| Availability of qualified labor .....                        | 31                   | 4.7                  |
| Workforce wellness .....                                     | 94                   | 5.5                  |
| National tourism perception .....                            | 90                   | 4.5                  |
| Natural and cultural resources .....                         | 113                  | 3.2                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               |                                         | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                      | Rank/124 |
|------------------------------------------------------|-----------------------------------------|----------|------------------------------------------------------|------------------------------------------------------|----------|
| <b>Health and hygiene</b>                            |                                         |          | <b>Policy rules and regulations</b>                  |                                                      |          |
| 4.02                                                 | Physician density                       | 50       | 1.01                                                 | Foreign ownership restrictions                       | 117      |
| <b>Price competitiveness in the T&amp;T industry</b> |                                         |          | 1.03                                                 | Rules governing foreign direct investment            | 100      |
| 10.02                                                | Purchasing power parity                 | 20       | 1.04                                                 | Visa requirements                                    | 100      |
| 10.01                                                | Ticket taxes and airport charges        | 31       | 1.02                                                 | Property rights                                      | 72       |
| 10.04                                                | Fuel price level                        | 46       | <b>Environmental regulation</b>                      |                                                      |          |
| <b>Human resources</b>                               |                                         |          | 2.01                                                 | Stringency of environmental regulation               | 99       |
| 11.08                                                | HIV prevalence                          | 1        | 2.02                                                 | Clarity and stability of environmental regulations   | 78       |
| 11.06                                                | Hiring and firing practices             | 22       | 2.03                                                 | Government prioritization of sustainable T&T         | 76       |
| <b>National tourism perception</b>                   |                                         |          | <b>Safety and security</b>                           |                                                      |          |
| 12.03                                                | Recommendation to extend business trips | 12       | 3.01                                                 | Business costs of terrorism                          | 107      |
|                                                      |                                         |          | 3.03                                                 | Business costs of crime and violence                 | 73       |
|                                                      |                                         |          | 3.02                                                 | Reliability of police services                       | 59       |
|                                                      |                                         |          | <b>Health and hygiene</b>                            |                                                      |          |
|                                                      |                                         |          | 4.04                                                 | Access to improved drinking water                    | 102      |
|                                                      |                                         |          | 4.03                                                 | Access to improved sanitation                        | 82       |
|                                                      |                                         |          | 4.01                                                 | Gov't efforts to reduce health risks from pandemics  | 55       |
|                                                      |                                         |          | <b>Prioritization of Travel &amp; Tourism</b>        |                                                      |          |
|                                                      |                                         |          | 5.04                                                 | T&T fair attendance                                  | 117      |
|                                                      |                                         |          | 5.03                                                 | Effectiveness of marketing and branding              | 88       |
|                                                      |                                         |          | 5.01                                                 | Government prioritization of the T&T industry        | 68       |
|                                                      |                                         |          | <b>Air transport infrastructure</b>                  |                                                      |          |
|                                                      |                                         |          | 6.02                                                 | Available seat kilometers                            | 112      |
|                                                      |                                         |          | 6.06                                                 | International air transport network                  | 111      |
|                                                      |                                         |          | 6.01                                                 | Quality of air transport infrastructure              | 110      |
|                                                      |                                         |          | 6.03                                                 | Departures per 1,000 population                      | 85       |
|                                                      |                                         |          | 6.05                                                 | Number of operating airlines                         | 72       |
|                                                      |                                         |          | 6.04                                                 | Airport density                                      | 58       |
|                                                      |                                         |          | <b>Ground transport infrastructure</b>               |                                                      |          |
|                                                      |                                         |          | 7.03                                                 | Port infrastructure                                  | 115      |
|                                                      |                                         |          | 7.01                                                 | Road infrastructure                                  | 109      |
|                                                      |                                         |          | 7.04                                                 | Domestic transport network                           | 94       |
|                                                      |                                         |          | 7.02                                                 | Railroad infrastructure                              | 55       |
|                                                      |                                         |          | <b>Tourism infrastructure</b>                        |                                                      |          |
|                                                      |                                         |          | 8.02                                                 | Presence of major car rental companies               | 121      |
|                                                      |                                         |          | 8.01                                                 | Hotel rooms                                          | 114      |
|                                                      |                                         |          | 8.03                                                 | ATMs accepting Visa cards                            | 100      |
|                                                      |                                         |          | <b>ICT infrastructure</b>                            |                                                      |          |
|                                                      |                                         |          | 9.02                                                 | Internet users                                       | 123      |
|                                                      |                                         |          | 9.03                                                 | Telephone lines                                      | 100      |
|                                                      |                                         |          | 9.01                                                 | Extent of business Internet use                      | 83       |
|                                                      |                                         |          | <b>Price competitiveness in the T&amp;T industry</b> |                                                      |          |
|                                                      |                                         |          | 10.03                                                | Extent and effect of taxation                        | 78       |
|                                                      |                                         |          | <b>Human resources</b>                               |                                                      |          |
|                                                      |                                         |          | 11.05                                                | Extent of staff training                             | 110      |
|                                                      |                                         |          | 11.03                                                | Quality of the educational system                    | 107      |
|                                                      |                                         |          | 11.04                                                | Local availability of research and training services | 106      |
|                                                      |                                         |          | 11.10                                                | Tuberculosis incidence                               | 97       |
|                                                      |                                         |          | 11.11                                                | Life expectancy                                      | 93       |
|                                                      |                                         |          | 11.09                                                | Malaria incidence                                    | 88       |
|                                                      |                                         |          | 11.01                                                | Primary education enrollment                         | 80       |
|                                                      |                                         |          | 11.02                                                | Secondary education enrollment                       | 71       |
|                                                      |                                         |          | 11.07                                                | Ease of hiring foreign labor                         | 69       |

(Disadvantages cont'd. from bottom of right column)

&lt;&lt;&lt; (Cont'd. on bottom of left column)

# Tanzania

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 38.3  |
| Surface area (1,000 square kilometers) .....              | 945.1 |
| Gross domestic product (US\$ billions), 2005 .....        | 12.6  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 723   |
| Real GDP growth (percent), 2005 .....                     | 6.8   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

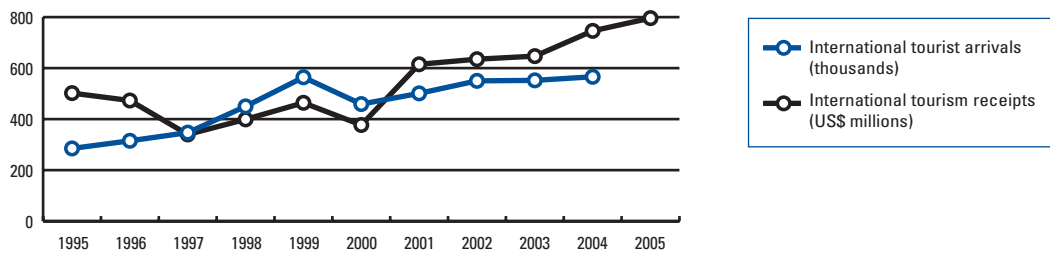
|                               |     | Percent of total | 2007-2016 annual growth (% forecast) |
|-------------------------------|-----|------------------|--------------------------------------|
| GDP (US\$ millions) .....     | 427 | 3.2              | 4.8                                  |
| Employment (1,000 jobs) ..... | 222 | 2.5              | 4.1                                  |

### T&T economy, 2006 estimates

|                               |       |     |     |
|-------------------------------|-------|-----|-----|
| GDP (US\$ millions) .....     | 1,042 | 7.8 | 4.5 |
| Employment (1,000 jobs) ..... | 554   | 6.2 | 3.8 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2004 .....         | 566 |
| International tourism receipts (US\$ millions), 2005 ..... | 796 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank (out of 124) | Score (1-7 scale) |
|--------------------------------------------------------------|-------------------|-------------------|
| <b>2007 Index .....</b>                                      | <b>80</b>         | <b>3.9</b>        |
| <b>T&amp;T regulatory framework .....</b>                    | <b>72</b>         | <b>4.1</b>        |
| Policy rules and regulations .....                           | 101               | 3.7               |
| Environmental regulation .....                               | 44                | 4.4               |
| Safety and security .....                                    | 79                | 4.1               |
| Health and hygiene .....                                     | 101               | 3.6               |
| Prioritization of T&T strategies .....                       | 31                | 4.6               |
| <b>T&amp;T business environment and infrastructure .....</b> | <b>89</b>         | <b>2.9</b>        |
| Air transport infrastructure .....                           | 100               | 2.3               |
| Ground transport infrastructure .....                        | 68                | 3.4               |
| Tourism infrastructure .....                                 | 84                | 2.4               |
| ICT infrastructure .....                                     | 108               | 1.8               |
| Price competitiveness in T&T industry .....                  | 63                | 4.6               |
| <b>T&amp;T human, cultural, and natural resources .....</b>  | <b>75</b>         | <b>4.6</b>        |
| Human resources .....                                        | 110               | 3.7               |
| Education and training .....                                 | 111               | 3.6               |
| Availability of qualified labor .....                        | 54                | 4.5               |
| Workforce wellness .....                                     | 112               | 2.9               |
| National tourism perception .....                            | 42                | 5.3               |
| Natural and cultural resources .....                         | 34                | 5.0               |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."



## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                         | Rank/124 | COMPETITIVE DISADVANTAGES                                       | Rank/124 |
|----------------------------------------------------------------|----------|-----------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                            |          | <b>Policy rules and regulations</b>                             |          |
| 1.03 Rules governing foreign direct investment .....           | 36       | 1.04 Visa requirements .....                                    | 106      |
| 1.01 Foreign ownership restrictions.....                       | 40       | 1.05 Openness of bilateral Air Service Agreements .....         | 102      |
| <b>Environmental regulation</b>                                |          | 1.02 Property rights.....                                       | 84       |
| 2.03 Government prioritization of sustainable T&T .....        | 20       | <b>Environmental regulation</b>                                 |          |
| 2.02 Clarity and stability of environmental regulations .....  | 43       | 2.01 Stringency of environmental regulation .....               | 68       |
| <b>Health and hygiene</b>                                      |          | <b>Safety and security</b>                                      |          |
| 4.01 Gov't efforts to reduce health risks from pandemics ..... | 44       | 3.03 Business costs of crime and violence.....                  | 86       |
| <b>Prioritization of Travel &amp; Tourism</b>                  |          | 3.02 Reliability of police services .....                       | 82       |
| 5.02 T&T government expenditure .....                          | 24       | 3.01 Business costs of terrorism .....                          | 53       |
| 5.01 Government prioritization of the T&T industry.....        | 26       | <b>Health and hygiene</b>                                       |          |
| 5.03 Effectiveness of marketing and branding .....             | 33       | 4.02 Physician density.....                                     | 122      |
| 5.04 T&T fair attendance .....                                 | 35       | 4.04 Access to improved drinking water .....                    | 95       |
| <b>Human resources</b>                                         |          | 4.03 Access to improved sanitation .....                        | 89       |
| 11.01 Primary education enrollment .....                       | 1        | <b>Air transport infrastructure</b>                             |          |
| <b>National tourism perception</b>                             |          | 6.03 Departures per 1,000 population.....                       | 106      |
| 12.01 Tourism openness .....                                   | 24       | 6.01 Quality of air transport infrastructure .....              | 88       |
| <b>Natural and cultural resources</b>                          |          | 6.04 Airport density.....                                       | 87       |
| 13.03 Nationally protected areas.....                          | 7        | 6.02 Available seat kilometers.....                             | 82       |
| 13.02 Carbon dioxide damage.....                               | 26       | 6.06 International air transport network .....                  | 81       |
| 13.01 Number of World Heritage sites .....                     | 30       | 6.05 Number of operating airlines.....                          | 77       |
|                                                                |          | <b>Ground transport infrastructure</b>                          |          |
|                                                                |          | 7.01 Road infrastructure.....                                   | 73       |
|                                                                |          | 7.03 Port infrastructure .....                                  | 68       |
|                                                                |          | 7.04 Domestic transport network .....                           | 68       |
|                                                                |          | 7.02 Railroad infrastructure .....                              | 56       |
|                                                                |          | <b>Tourism infrastructure</b>                                   |          |
|                                                                |          | 8.01 Hotel rooms.....                                           | 93       |
|                                                                |          | 8.02 Presence of major car rental companies.....                | 92       |
|                                                                |          | <b>ICT infrastructure</b>                                       |          |
|                                                                |          | 9.03 Telephone lines.....                                       | 118      |
|                                                                |          | 9.02 Internet users .....                                       | 109      |
|                                                                |          | 9.01 Extent of business Internet use .....                      | 87       |
|                                                                |          | <b>Price competitiveness in the T&amp;T industry</b>            |          |
|                                                                |          | 10.04 Fuel price level .....                                    | 77       |
|                                                                |          | 10.01 Ticket taxes and airport charges.....                     | 69       |
|                                                                |          | 10.02 Purchasing power parity.....                              | 54       |
|                                                                |          | 10.03 Extent and effect of taxation.....                        | 53       |
|                                                                |          | <b>Human resources</b>                                          |          |
|                                                                |          | 11.02 Secondary education enrollment.....                       | 121      |
|                                                                |          | 11.08 HIV prevalence .....                                      | 116      |
|                                                                |          | 11.11 Life expectancy .....                                     | 111      |
|                                                                |          | 11.09 Malaria incidence.....                                    | 108      |
|                                                                |          | 11.10 Tuberculosis incidence .....                              | 107      |
|                                                                |          | 11.05 Extent of staff training.....                             | 87       |
|                                                                |          | 11.03 Quality of the educational system .....                   | 84       |
|                                                                |          | 11.06 Hiring and firing practices.....                          | 56       |
|                                                                |          | 11.04 Local availability of research and training services..... | 54       |
|                                                                |          | 11.07 Ease of hiring foreign labor .....                        | 51       |
|                                                                |          | <b>National tourism perception</b>                              |          |
|                                                                |          | 12.02 Attitude toward tourists .....                            | 65       |
|                                                                |          | 12.03 Recommendation to extend business trips .....             | 53       |
|                                                                |          | <b>Natural and cultural resources</b>                           |          |
|                                                                |          | 13.05 Risk of malaria and yellow fever .....                    | 103      |
|                                                                |          | 13.04 Business concern for ecosystems .....                     | 80       |

# Thailand

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 64.2  |
| Surface area (1,000 square kilometers) .....              | 513.1 |
| Gross domestic product (US\$ billions), 2005 .....        | 173.1 |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 8,368 |
| Real GDP growth (percent), 2005 .....                     | 4.5   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

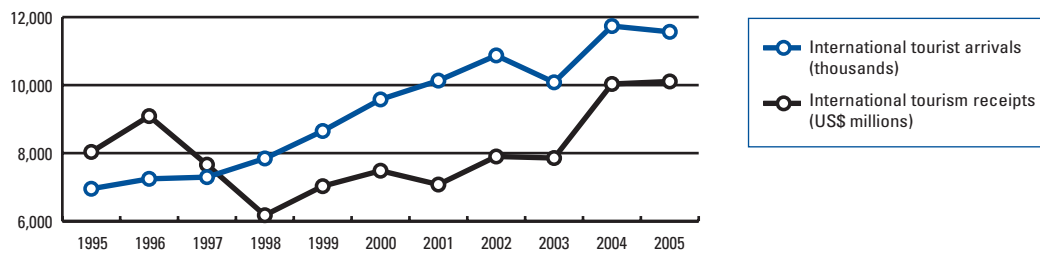
|                               |        | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|--------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 13,558 | 6.5                 | 4.9                                         |
| Employment (1,000 jobs) ..... | 1,842  | 5.2                 | 1.1                                         |

### T&T economy, 2006 estimates

|                               |        |      |     |
|-------------------------------|--------|------|-----|
| GDP (US\$ millions) .....     | 29,587 | 14.3 | 5.2 |
| Employment (1,000 jobs) ..... | 3,820  | 10.7 | 1.4 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |        |
|------------------------------------------------------------|--------|
| International tourist arrivals (1,000), 2005 .....         | 11,567 |
| International tourism receipts (US\$ millions), 2005 ..... | 10,108 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>43</b>            | <b>4.6</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>41</b>            | <b>4.8</b>           |
| Policy rules and regulations .....                           | 55                   | 4.8                  |
| Environmental regulation .....                               | 39                   | 4.6                  |
| Safety and security .....                                    | 42                   | 4.9                  |
| Health and hygiene .....                                     | 59                   | 4.8                  |
| Prioritization of T&T strategies .....                       | 25                   | 4.8                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>35</b>            | <b>4.1</b>           |
| Air transport infrastructure .....                           | 25                   | 4.1                  |
| Ground transport infrastructure .....                        | 28                   | 4.7                  |
| Tourism infrastructure .....                                 | 53                   | 3.4                  |
| ICT infrastructure .....                                     | 58                   | 2.8                  |
| Price competitiveness in T&T industry .....                  | 4                    | 5.7                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>59</b>            | <b>4.8</b>           |
| Human resources .....                                        | 75                   | 5.0                  |
| Education and training .....                                 | 48                   | 5.0                  |
| Availability of qualified labor .....                        | 81                   | 4.1                  |
| Workforce wellness .....                                     | 90                   | 5.8                  |
| National tourism perception .....                            | 35                   | 5.4                  |
| Natural and cultural resources .....                         | 77                   | 4.1                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                         | Rank/124 | COMPETITIVE DISADVANTAGES                                       | Rank/124 |
|----------------------------------------------------------------|----------|-----------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                            |          | <b>Policy rules and regulations</b>                             |          |
| 1.04 Visa requirements .....                                   | 15       | 1.01 Foreign ownership restrictions.....                        | 104      |
| 1.02 Property rights.....                                      | 40       | 1.03 Rules governing foreign direct investment .....            | 58       |
| <b>Environmental regulation</b>                                |          | 1.05 Openness of bilateral Air Service Agreements .....         | 58       |
| 2.03 Government prioritization of sustainable T&T .....        | 37       | <b>Environmental regulation</b>                                 |          |
| 2.02 Clarity and stability of environmental regulations .....  | 38       | 2.01 Stringency of environmental regulation .....               | 44       |
| <b>Safety and security</b>                                     |          | <b>Safety and security</b>                                      |          |
| 3.03 Business costs of crime and violence.....                 | 40       | 3.01 Business costs of terrorism .....                          | 80       |
| 3.02 Reliability of police services .....                      | 41       | <b>Health and hygiene</b>                                       |          |
| <b>Health and hygiene</b>                                      |          | 4.02 Physician density.....                                     | 97       |
| 4.01 Gov't efforts to reduce health risks from pandemics ..... | 34       | 4.04 Access to improved drinking water .....                    | 70       |
| 4.03 Access to improved sanitation .....                       | 36       | <b>Prioritization of Travel &amp; Tourism</b>                   |          |
| <b>Prioritization of Travel &amp; Tourism</b>                  |          | 5.02 T&T government expenditure .....                           | 69       |
| 5.04 T&T fair attendance.....                                  | 4        | <b>Air transport infrastructure</b>                             |          |
| 5.03 Effectiveness of marketing and branding .....             | 11       | 6.04 Airport density.....                                       | 104      |
| 5.01 Government prioritization of the T&T industry.....        | 14       | 6.03 Departures per 1,000 population.....                       | 64       |
| <b>Air transport infrastructure</b>                            |          | <b>Tourism infrastructure</b>                                   |          |
| 6.05 Number of operating airlines.....                         | 11       | 8.02 Presence of major car rental companies.....                | 55       |
| 6.02 Available seat kilometers.....                            | 14       | 8.01 Hotel rooms.....                                           | 44       |
| 6.01 Quality of air transport infrastructure .....             | 31       | <b>ICT infrastructure</b>                                       |          |
| 6.06 International air transport network .....                 | 41       | 9.03 Telephone lines.....                                       | 80       |
| <b>Ground transport infrastructure</b>                         |          | 9.02 Internet users .....                                       | 61       |
| 7.01 Road infrastructure.....                                  | 28       | <b>Human resources</b>                                          |          |
| 7.04 Domestic transport network .....                          | 31       | 11.08 HIV prevalence .....                                      | 96       |
| 7.03 Port infrastructure .....                                 | 37       | 11.01 Primary education enrollment .....                        | 91       |
| 7.02 Railroad infrastructure .....                             | 40       | 11.10 Tuberculosis incidence .....                              | 88       |
| <b>Tourism infrastructure</b>                                  |          | 11.09 Malaria incidence.....                                    | 86       |
| 8.03 ATMs accepting Visa cards .....                           | 42       | 11.07 Ease of hiring foreign labor .....                        | 84       |
| <b>ICT infrastructure</b>                                      |          | 11.02 Secondary education enrollment.....                       | 77       |
| 9.01 Extent of business Internet use .....                     | 28       | 11.11 Life expectancy .....                                     | 75       |
| <b>Price competitiveness in the T&amp;T industry</b>           |          | 11.04 Local availability of research and training services..... | 66       |
| 10.01 Ticket taxes and airport charges.....                    | 11       | 11.06 Hiring and firing practices.....                          | 65       |
| 10.04 Fuel price level .....                                   | 19       | <b>Natural and cultural resources</b>                           |          |
| 10.03 Extent and effect of taxation.....                       | 22       | 13.05 Risk of malaria and yellow fever .....                    | 102      |
| 10.02 Purchasing power parity .....                            | 27       | 13.02 Carbon dioxide damage.....                                | 97       |
| <b>Human resources</b>                                         |          | 13.01 Number of World Heritage sites .....                      | 48       |
| 11.05 Extent of staff training.....                            | 30       | 13.04 Business concern for ecosystems .....                     | 46       |
| 11.03 Quality of the educational system .....                  | 41       | <b>Natural tourism perception</b>                               |          |
| <b>Natural tourism perception</b>                              |          | 12.02 Attitude toward tourists .....                            | 6        |
| 12.02 Attitude toward tourists .....                           | 6        | 12.01 Tourism openness .....                                    | 26       |
| 12.01 Tourism openness .....                                   | 26       | 12.03 Recommendation to extend business trips .....             | 28       |
| 12.03 Recommendation to extend business trips .....            | 28       | <b>Natural and cultural resources</b>                           |          |
| <b>Natural and cultural resources</b>                          |          | 13.03 Nationally protected areas.....                           | 28       |

# Trinidad and Tobago

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 1.3    |
| Surface area (1,000 square kilometers) .....              | 5.1    |
| Gross domestic product (US\$ billions), 2005 .....        | 16.3   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 14,258 |
| Real GDP growth (percent), 2005 .....                     | 7.9    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

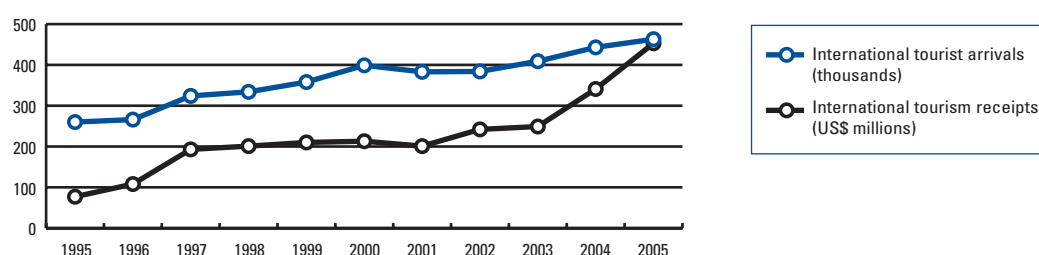
|                               |     | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-----|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 718 | 5.1                 | 4.6                                         |
| Employment (1,000 jobs) ..... | 36  | 6.0                 | 2.4                                         |

### T&T economy, 2006 estimates

|                               |       |      |     |
|-------------------------------|-------|------|-----|
| GDP (US\$ millions) .....     | 2,065 | 14.6 | 4.8 |
| Employment (1,000 jobs) ..... | 104   | 17.3 | 2.6 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2005 .....         | 463 |
| International tourism receipts (US\$ millions), 2005 ..... | 453 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>85</b>            | <b>3.8</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>88</b>            | <b>3.8</b>           |
| Policy rules and regulations .....                           | 60                   | 4.7                  |
| Environmental regulation .....                               | 100                  | 3.3                  |
| Safety and security .....                                    | 121                  | 2.9                  |
| Health and hygiene .....                                     | 64                   | 4.7                  |
| Prioritization of T&T strategies .....                       | 75                   | 3.6                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>65</b>            | <b>3.3</b>           |
| Air transport infrastructure .....                           | 46                   | 3.4                  |
| Ground transport infrastructure .....                        | 90                   | 2.8                  |
| Tourism infrastructure .....                                 | 65                   | 3.0                  |
| ICT infrastructure .....                                     | 57                   | 2.8                  |
| Price competitiveness in T&T industry .....                  | 50                   | 4.7                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>104</b>           | <b>4.2</b>           |
| Human resources .....                                        | 64                   | 5.1                  |
| Education and training .....                                 | 57                   | 4.9                  |
| Availability of qualified labor .....                        | 68                   | 4.2                  |
| Workforce wellness .....                                     | 74                   | 6.2                  |
| National tourism perception .....                            | 106                  | 4.3                  |
| Natural and cultural resources .....                         | 111                  | 3.2                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

# Trinidad and Tobago

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                  | Rank/124 | COMPETITIVE DISADVANTAGES                                       | Rank/124 |
|---------------------------------------------------------|----------|-----------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                     |          | <b>Policy rules and regulations</b>                             |          |
| 1.01 Foreign ownership restrictions.....                | 38       | 1.04 Visa requirements .....                                    | 85       |
| 1.03 Rules governing foreign direct investment .....    | 39       | 1.02 Property rights.....                                       | 65       |
| 1.05 Openness of bilateral Air Service Agreements ..... | 42       |                                                                 |          |
| <b>Health and hygiene</b>                               |          | <b>Environmental regulation</b>                                 |          |
| 4.03 Access to improved sanitation .....                | 1        | 2.03 Government prioritization of sustainable T&T .....         | 107      |
|                                                         |          | 2.02 Clarity and stability of environmental regulations .....   | 87       |
|                                                         |          | 2.01 Stringency of environmental regulation .....               | 86       |
| <b>Prioritization of Travel &amp; Tourism</b>           |          | <b>Safety and security</b>                                      |          |
| 5.02 T&T government expenditure .....                   | 39       | 3.02 Reliability of police services .....                       | 122      |
| 5.04 T&T fair attendance .....                          | 48       | 3.03 Business costs of crime and violence.....                  | 117      |
|                                                         |          | 3.01 Business costs of terrorism .....                          | 108      |
| <b>Air transport infrastructure</b>                     |          | <b>Health and hygiene</b>                                       |          |
| 6.03 Departures per 1,000 population.....               | 11       | 4.01 Gov't efforts to reduce health risks from pandemics .....  | 106      |
|                                                         |          | 4.02 Physician density .....                                    | 83       |
|                                                         |          | 4.04 Access to improved drinking water .....                    | 58       |
| <b>Price competitiveness in the T&amp;T industry</b>    |          | <b>Prioritization of Travel &amp; Tourism</b>                   |          |
| 10.04 Fuel price level .....                            | 10       | 5.03 Effectiveness of marketing and branding .....              | 89       |
| 10.03 Extent and effect of taxation.....                | 24       | 5.01 Government prioritization of the T&T industry.....         | 81       |
| <b>Human resources</b>                                  |          | <b>Air transport infrastructure</b>                             |          |
| 11.01 Primary education enrollment .....                | 1        | 6.02 Available seat kilometers.....                             | 79       |
| 11.10 Tuberculosis incidence .....                      | 27       | 6.05 Number of operating airlines.....                          | 75       |
| 11.06 Hiring and firing practices.....                  | 47       | 6.04 Airport density.....                                       | 71       |
| 11.03 Quality of the educational system .....           | 48       | 6.06 International air transport network .....                  | 69       |
|                                                         |          | 6.01 Quality of air transport infrastructure .....              | 61       |
|                                                         |          | <b>Ground transport infrastructure</b>                          |          |
|                                                         |          | 7.02 Railroad infrastructure .....                              | 118      |
|                                                         |          | 7.04 Domestic transport network .....                           | 98       |
|                                                         |          | 7.03 Port infrastructure .....                                  | 79       |
|                                                         |          | 7.01 Road infrastructure.....                                   | 71       |
|                                                         |          | <b>Tourism infrastructure</b>                                   |          |
|                                                         |          | 8.02 Presence of major car rental companies.....                | 66       |
|                                                         |          | 8.01 Hotel rooms.....                                           | 54       |
|                                                         |          | 8.03 ATMs accepting Visa cards .....                            | 51       |
|                                                         |          | <b>ICT infrastructure</b>                                       |          |
|                                                         |          | 9.01 Extent of business Internet use .....                      | 64       |
|                                                         |          | 9.02 Internet users .....                                       | 57       |
|                                                         |          | 9.03 Telephone lines.....                                       | 51       |
|                                                         |          | <b>Price competitiveness in the T&amp;T industry</b>            |          |
|                                                         |          | 10.01 Ticket taxes and airport charges.....                     | 104      |
|                                                         |          | 10.02 Purchasing power parity.....                              | 93       |
|                                                         |          | <b>Human resources</b>                                          |          |
|                                                         |          | 11.08 HIV prevalence .....                                      | 106      |
|                                                         |          | 11.07 Ease of hiring foreign labor .....                        | 93       |
|                                                         |          | 11.11 Life expectancy .....                                     | 75       |
|                                                         |          | 11.04 Local availability of research and training services..... | 72       |
|                                                         |          | 11.02 Secondary education enrollment.....                       | 66       |
|                                                         |          | 11.05 Extent of staff training.....                             | 51       |
|                                                         |          | <b>National tourism perception</b>                              |          |
|                                                         |          | 12.02 Attitude toward tourists .....                            | 99       |
|                                                         |          | 12.03 Recommendation to extend business trips .....             | 99       |
|                                                         |          | 12.01 Tourism openness .....                                    | 68       |
|                                                         |          | <b>Natural and cultural resources</b>                           |          |
|                                                         |          | 13.02 Carbon dioxide damage.....                                | 116      |
|                                                         |          | 13.01 Number of World Heritage sites .....                      | 107      |
|                                                         |          | 13.04 Business concern for ecosystems .....                     | 81       |
|                                                         |          | 13.03 Nationally protected areas.....                           | 71       |

# Tunisia

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 10.0  |
| Surface area (1,000 square kilometers) .....              | 163.6 |
| Gross domestic product (US\$ billions), 2005 .....        | 28.7  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 8,255 |
| Real GDP growth (percent), 2005 .....                     | 4.2   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

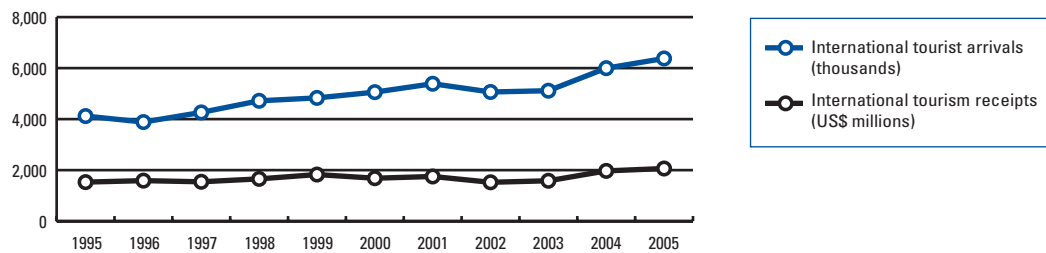
|                               |       | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 2,760 | 9.2                 | 4.7                                         |
| Employment (1,000 jobs) ..... | 271   | 9.0                 | 2.2                                         |

### T&T economy, 2006 estimates

|                               |       |      |     |
|-------------------------------|-------|------|-----|
| GDP (US\$ millions) .....     | 5,449 | 18.1 | 4.4 |
| Employment (1,000 jobs) ..... | 510   | 17.0 | 1.9 |

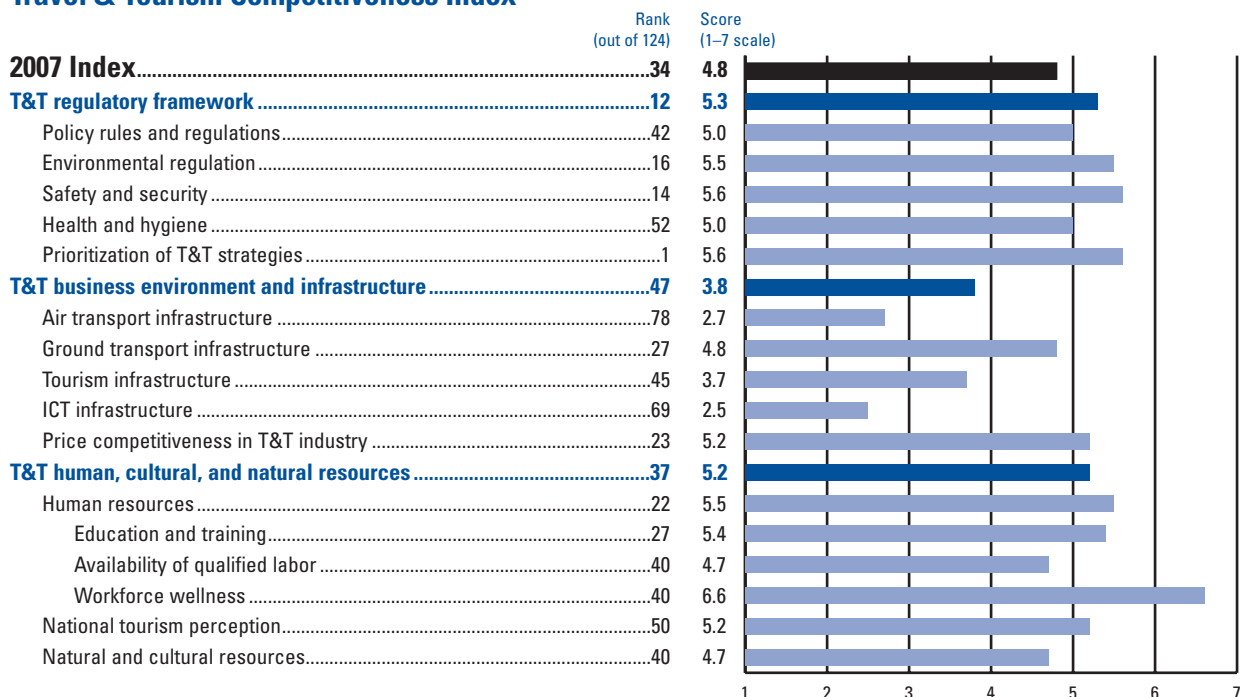
Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 6,378 |
| International tourism receipts (US\$ millions), 2005 ..... | 2,063 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index



Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                          | Rank/124 | COMPETITIVE DISADVANTAGES                               | Rank/124 |
|-----------------------------------------------------------------|----------|---------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                             |          | <b>Policy rules and regulations</b>                     |          |
| 1.03 Rules governing foreign direct investment .....            | 25       | 1.05 Openness of bilateral Air Service Agreements ..... | 57       |
| <b>Environmental regulation</b>                                 |          | 1.01 Foreign ownership restrictions.....                | 51       |
| 2.03 Government prioritization of sustainable T&T .....         | 3        | 1.04 Visa requirements .....                            | 43       |
| 2.02 Clarity and stability of environmental regulations .....   | 17       | 1.02 Property rights.....                               | 35       |
| 2.01 Stringency of environmental regulation .....               | 26       | <b>Health and hygiene</b>                               |          |
| <b>Safety and security</b>                                      |          | 4.04 Access to improved drinking water .....            | 78       |
| 3.01 Business costs of terrorism .....                          | 15       | 4.02 Physician density .....                            | 66       |
| 3.03 Business costs of crime and violence.....                  | 21       | 4.03 Access to improved sanitation .....                | 56       |
| 3.02 Reliability of police services .....                       | 24       | <b>Air transport infrastructure</b>                     |          |
| <b>Health and hygiene</b>                                       |          | 6.04 Airport density .....                              | 91       |
| 4.01 Gov't efforts to reduce health risks from pandemics .....  | 3        | 6.02 Available seat kilometers.....                     | 70       |
| <b>Prioritization of Travel &amp; Tourism</b>                   |          | 6.03 Departures per 1,000 population.....               | 62       |
| 5.04 T&T fair attendance.....                                   | 4        | 6.05 Number of operating airlines.....                  | 57       |
| 5.01 Government prioritization of the T&T industry.....         | 10       | 6.06 International air transport network .....          | 57       |
| 5.03 Effectiveness of marketing and branding .....              | 14       | 6.01 Quality of air transport infrastructure .....      | 49       |
| 5.02 T&T government expenditure .....                           | 17       | <b>Ground transport infrastructure</b>                  |          |
| <b>Ground transport infrastructure</b>                          |          | 7.04 Domestic transport network .....                   | 37       |
| 7.02 Railroad infrastructure .....                              | 25       | 7.01 Road infrastructure .....                          | 36       |
| <b>Tourism infrastructure</b>                                   |          | 7.03 Port infrastructure .....                          | 34       |
| 8.01 Hotel rooms.....                                           | 17       | <b>Tourism infrastructure</b>                           |          |
| <b>Price competitiveness in the T&amp;T industry</b>            |          | 8.03 ATMs accepting Visa cards .....                    | 71       |
| 10.03 Extent and effect of taxation.....                        | 18       | 8.02 Presence of major car rental companies.....        | 55       |
| 10.04 Fuel price level .....                                    | 21       | <b>ICT infrastructure</b>                               |          |
| 10.02 Purchasing power parity.....                              | 32       | 9.03 Telephone lines.....                               | 77       |
| <b>Human resources</b>                                          |          | 9.02 Internet users .....                               | 70       |
| 11.01 Primary education enrollment .....                        | 1        | 9.01 Extent of business Internet use .....              | 59       |
| 11.08 HIV prevalence .....                                      | 1        | <b>Price competitiveness in the T&amp;T industry</b>    |          |
| 11.09 Malaria incidence.....                                    | 1        | 10.01 Ticket taxes and airport charges.....             | 103      |
| 11.03 Quality of the educational system .....                   | 11       | <b>Human resources</b>                                  |          |
| 11.06 Hiring and firing practices.....                          | 32       | 11.02 Secondary education enrollment.....               | 72       |
| 11.04 Local availability of research and training services..... | 33       | 11.07 Ease of hiring foreign labor .....                | 61       |
| <b>National tourism perception</b>                              |          | 11.11 Life expectancy .....                             | 53       |
| 12.03 Recommendation to extend business trips .....             | 18       | 11.05 Extent of staff training.....                     | 36       |
| <b>Natural and cultural resources</b>                           |          | 11.10 Tuberculosis incidence .....                      | 34       |
| 13.04 Business concern for ecosystems .....                     | 20       | <b>National tourism perception</b>                      |          |
| 13.01 Number of World Heritage sites .....                      | 24       | 12.02 Attitude toward tourists .....                    | 75       |
|                                                                 |          | 12.01 Tourism openness .....                            | 34       |
|                                                                 |          | <b>Natural and cultural resources</b>                   |          |
|                                                                 |          | 13.03 Nationally protected areas.....                   | 106      |
|                                                                 |          | 13.02 Carbon dioxide damage.....                        | 73       |

# Turkey

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 72.6  |
| Surface area (1,000 square kilometers) .....              | 783.6 |
| Gross domestic product (US\$ billions), 2005 .....        | 362.5 |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 7,950 |
| Real GDP growth (percent), 2005 .....                     | 7.4   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

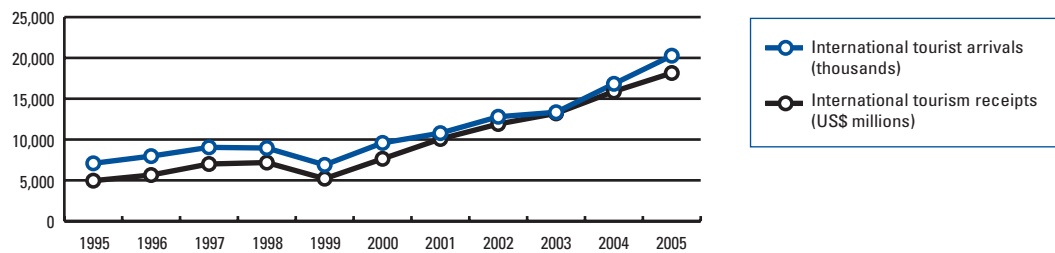
|                               |        | Percent of total | 2007–2016 annual growth (% forecast) |
|-------------------------------|--------|------------------|--------------------------------------|
| GDP (US\$ millions) .....     | 23,019 | 5.7              | 3.6                                  |
| Employment (1,000 jobs) ..... | 726    | 3.3              | 0.1                                  |

### T&T economy, 2006 estimates

|                               |        |      |     |
|-------------------------------|--------|------|-----|
| GDP (US\$ millions) .....     | 54,220 | 13.5 | 3.8 |
| Employment (1,000 jobs) ..... | 1,710  | 7.8  | 0.3 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |        |
|------------------------------------------------------------|--------|
| International tourist arrivals (1,000), 2005 .....         | 20,273 |
| International tourism receipts (US\$ millions), 2005 ..... | 18,152 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank (out of 124) | Score (1–7 scale) |
|--------------------------------------------------------------|-------------------|-------------------|
| <b>2007 Index</b> .....                                      | <b>52</b>         | <b>4.3</b>        |
| <b>T&amp;T regulatory framework</b> .....                    | <b>53</b>         | <b>4.5</b>        |
| Policy rules and regulations .....                           | 51                | 4.8               |
| Environmental regulation .....                               | 61                | 4.0               |
| Safety and security .....                                    | 56                | 4.6               |
| Health and hygiene .....                                     | 54                | 4.9               |
| Prioritization of T&T strategies .....                       | 54                | 3.9               |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>63</b>         | <b>3.5</b>        |
| Air transport infrastructure .....                           | 51                | 3.3               |
| Ground transport infrastructure .....                        | 59                | 3.7               |
| Tourism infrastructure .....                                 | 55                | 3.3               |
| ICT infrastructure .....                                     | 54                | 3.0               |
| Price competitiveness in T&T industry .....                  | 86                | 4.2               |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>48</b>         | <b>5.0</b>        |
| Human resources .....                                        | 65                | 5.1               |
| Education and training .....                                 | 63                | 4.7               |
| Availability of qualified labor .....                        | 83                | 4.1               |
| Workforce wellness .....                                     | 56                | 6.5               |
| National tourism perception .....                            | 43                | 5.3               |
| Natural and cultural resources .....                         | 47                | 4.6               |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."



## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                          | Rank/124 | COMPETITIVE DISADVANTAGES                                      | Rank/124 |
|-----------------------------------------------------------------|----------|----------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                             |          | <b>Policy rules and regulations</b>                            |          |
| 1.04 Visa requirements .....                                    | 15       | 1.01 Foreign ownership restrictions.....                       | 82       |
| 1.05 Openness of bilateral Air Service Agreements .....         | 42       | 1.03 Rules governing foreign direct investment .....           | 67       |
|                                                                 |          | 1.02 Property rights.....                                      | 53       |
| <b>Safety and security</b>                                      |          | <b>Environmental regulation</b>                                |          |
| 3.02 Reliability of police services .....                       | 47       | 2.02 Clarity and stability of environmental regulations .....  | 64       |
|                                                                 |          | 2.03 Government prioritization of sustainable T&T .....        | 61       |
| <b>Health and hygiene</b>                                       |          | 2.01 Stringency of environmental regulation .....              | 56       |
| 4.04 Access to improved drinking water .....                    | 49       |                                                                |          |
| <b>Prioritization of Travel &amp; Tourism</b>                   |          | <b>Safety and security</b>                                     |          |
| 5.04 T&T fair attendance .....                                  | 4        | 3.01 Business costs of terrorism .....                         | 90       |
|                                                                 |          | 3.03 Business costs of crime and violence.....                 | 51       |
| <b>Air transport infrastructure</b>                             |          | <b>Health and hygiene</b>                                      |          |
| 6.05 Number of operating airlines.....                          | 16       | 4.02 Physician density .....                                   | 64       |
| 6.02 Available seat kilometers.....                             | 27       | 4.01 Gov't efforts to reduce health risks from pandemics ..... | 62       |
| 6.06 International air transport network .....                  | 49       | 4.03 Access to improved sanitation .....                       | 54       |
| <b>Ground transport infrastructure</b>                          |          | <b>Prioritization of Travel &amp; Tourism</b>                  |          |
| 7.04 Domestic transport network .....                           | 28       | 5.02 T&T government expenditure .....                          | 110      |
|                                                                 |          | 5.01 Government prioritization of the T&T industry.....        | 73       |
| <b>Tourism infrastructure</b>                                   |          | 5.03 Effectiveness of marketing and branding .....             | 65       |
| 8.02 Presence of major car rental companies.....                | 1        |                                                                |          |
| <b>ICT infrastructure</b>                                       |          | <b>Air transport infrastructure</b>                            |          |
| 9.03 Telephone lines.....                                       | 47       | 6.04 Airport density .....                                     | 104      |
|                                                                 |          | 6.03 Departures per 1,000 population.....                      | 65       |
| <b>Price competitiveness in the T&amp;T industry</b>            |          | 6.01 Quality of air transport infrastructure .....             | 54       |
| 10.01 Ticket taxes and airport charges.....                     | 20       |                                                                |          |
| <b>Human resources</b>                                          |          | <b>Ground transport infrastructure</b>                         |          |
| 11.08 HIV prevalence .....                                      | 1        | 7.03 Port infrastructure .....                                 | 76       |
| 11.05 Extent of staff training.....                             | 39       | 7.02 Railroad infrastructure .....                             | 67       |
| 11.04 Local availability of research and training services..... | 41       | 7.01 Road infrastructure.....                                  | 53       |
| 11.10 Tuberculosis incidence .....                              | 49       |                                                                |          |
| <b>National tourism perception</b>                              |          | <b>Tourism infrastructure</b>                                  |          |
| 12.03 Recommendation to extend business trips .....             | 1        | 8.03 ATMs accepting Visa cards .....                           | 96       |
| 12.01 Tourism openness .....                                    | 40       | 8.01 Hotel rooms.....                                          | 61       |
| <b>Natural and cultural resources</b>                           |          | <b>ICT infrastructure</b>                                      |          |
| 13.01 Number of World Heritage sites .....                      | 21       | 9.01 Extent of business Internet use .....                     | 61       |
|                                                                 |          | 9.02 Internet users .....                                      | 55       |
|                                                                 |          | <b>Price competitiveness in the T&amp;T industry</b>           |          |
|                                                                 |          | 10.04 Fuel price level .....                                   | 107      |
|                                                                 |          | 10.03 Extent and effect of taxation.....                       | 83       |
|                                                                 |          | 10.02 Purchasing power parity.....                             | 76       |
|                                                                 |          | <b>Human resources</b>                                         |          |
|                                                                 |          | 11.01 Primary education enrollment .....                       | 111      |
|                                                                 |          | 11.06 Hiring and firing practices.....                         | 88       |
|                                                                 |          | 11.09 Malaria incidence.....                                   | 76       |
|                                                                 |          | 11.02 Secondary education enrollment.....                      | 75       |
|                                                                 |          | 11.03 Quality of the educational system .....                  | 73       |
|                                                                 |          | 11.07 Ease of hiring foreign labor .....                       | 67       |
|                                                                 |          | 11.11 Life expectancy .....                                    | 66       |
|                                                                 |          | <b>National tourism perception</b>                             |          |
|                                                                 |          | 12.02 Attitude toward tourists .....                           | 58       |
|                                                                 |          | <b>Natural and cultural resources</b>                          |          |
|                                                                 |          | 13.03 Nationally protected areas.....                          | 99       |
|                                                                 |          | 13.02 Carbon dioxide damage.....                               | 70       |
|                                                                 |          | 13.04 Business concern for ecosystems .....                    | 68       |

# Uganda

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 28.8  |
| Surface area (1,000 square kilometers) .....              | 241.0 |
| Gross domestic product (US\$ billions), 2005 .....        | 8.7   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 1,501 |
| Real GDP growth (percent), 2005 .....                     | 6.0   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

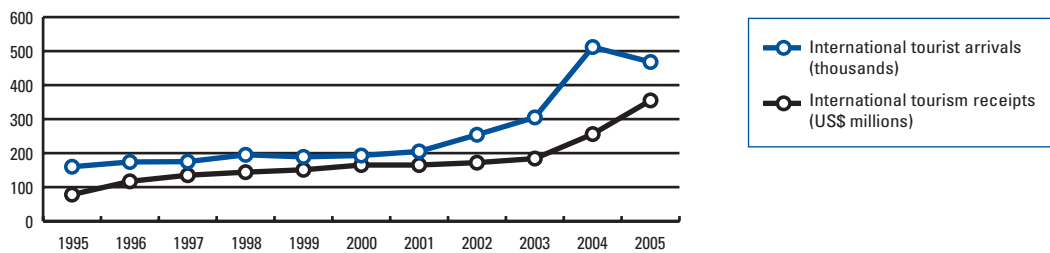
|                               |     | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-----|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 427 | 4.6                 | 4.7                                         |
| Employment (1,000 jobs) ..... | 214 | 3.6                 | 3.0                                         |

### T&T economy, 2006 estimates

|                               |     |     |     |
|-------------------------------|-----|-----|-----|
| GDP (US\$ millions) .....     | 856 | 9.2 | 4.7 |
| Employment (1,000 jobs) ..... | 434 | 7.3 | 3.1 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2005 .....         | 468 |
| International tourism receipts (US\$ millions), 2005 ..... | 355 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index .....</b>                                      | <b>101</b>           | <b>3.6</b>           |
| <b>T&amp;T regulatory framework .....</b>                    | <b>105</b>           | <b>3.5</b>           |
| Policy rules and regulations .....                           | 103                  | 3.7                  |
| Environmental regulation .....                               | 66                   | 3.9                  |
| Safety and security .....                                    | 109                  | 3.4                  |
| Health and hygiene .....                                     | 112                  | 3.1                  |
| Prioritization of T&T strategies .....                       | 79                   | 3.5                  |
| <b>T&amp;T business environment and infrastructure .....</b> | <b>119</b>           | <b>2.4</b>           |
| Air transport infrastructure .....                           | 115                  | 2.0                  |
| Ground transport infrastructure .....                        | 101                  | 2.5                  |
| Tourism infrastructure .....                                 | 119                  | 1.4                  |
| ICT infrastructure .....                                     | 100                  | 1.9                  |
| Price competitiveness in T&T industry .....                  | 65                   | 4.5                  |
| <b>T&amp;T human, cultural, and natural resources .....</b>  | <b>66</b>            | <b>4.7</b>           |
| Human resources .....                                        | 109                  | 3.9                  |
| Education and training .....                                 | 104                  | 3.9                  |
| Availability of qualified labor .....                        | 11                   | 5.3                  |
| Workforce wellness .....                                     | 118                  | 2.4                  |
| National tourism perception .....                            | 18                   | 5.9                  |
| Natural and cultural resources .....                         | 64                   | 4.3                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                  | Rank/124 | COMPETITIVE DISADVANTAGES                                       | Rank/124 |
|---------------------------------------------------------|----------|-----------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                     |          | <b>Policy rules and regulations</b>                             |          |
| 1.01 Foreign ownership restrictions.....                | 17       | 1.04 Visa requirements .....                                    | 113      |
| 1.03 Rules governing foreign direct investment .....    | 22       | 1.02 Property rights.....                                       | 101      |
| <b>Environmental regulation</b>                         |          | 1.05 Openness of bilateral Air Service Agreements .....         | 95       |
| 2.03 Government prioritization of sustainable T&T ..... | 41       | <b>Environmental regulation</b>                                 |          |
| <b>Prioritization of Travel &amp; Tourism</b>           |          | 2.02 Clarity and stability of environmental regulations .....   | 77       |
| 5.01 Government prioritization of the T&T industry..... | 41       | 2.01 Stringency of environmental regulation .....               | 75       |
| 5.03 Effectiveness of marketing and branding .....      | 44       | <b>Safety and security</b>                                      |          |
| <b>Price competitiveness in the T&amp;T industry</b>    |          | 3.01 Business costs of terrorism .....                          | 119      |
| 10.02 Purchasing power parity.....                      | 8        | 3.02 Reliability of police services .....                       | 86       |
| <b>Human resources</b>                                  |          | 3.03 Business costs of crime and violence.....                  | 85       |
| 11.01 Primary education enrollment .....                | 1        | <b>Health and hygiene</b>                                       |          |
| 11.06 Hiring and firing practices.....                  | 14       | 4.02 Physician density.....                                     | 112      |
| 11.07 Ease of hiring foreign labor .....                | 17       | 4.04 Access to improved drinking water .....                    | 104      |
| <b>National tourism perception</b>                      |          | 4.03 Access to improved sanitation .....                        | 96       |
| 12.02 Attitude toward tourists .....                    | 4        | 4.01 Gov't efforts to reduce health risks from pandemics .....  | 52       |
| <b>Natural and cultural resources</b>                   |          | <b>Prioritization of Travel &amp; Tourism</b>                   |          |
| 13.03 Nationally protected areas.....                   | 11       | 5.04 T&T fair attendance.....                                   | 90       |
| 13.02 Carbon dioxide damage.....                        | 17       | 5.02 T&T government expenditure .....                           | 78       |
|                                                         |          | <b>Air transport infrastructure</b>                             |          |
|                                                         |          | 6.03 Departures per 1,000 population.....                       | 115      |
|                                                         |          | 6.04 Airport density .....                                      | 111      |
|                                                         |          | 6.02 Available seat kilometers.....                             | 100      |
|                                                         |          | 6.06 International air transport network .....                  | 100      |
|                                                         |          | 6.01 Quality of air transport infrastructure .....              | 96       |
|                                                         |          | 6.05 Number of operating airlines.....                          | 88       |
|                                                         |          | <b>Ground transport infrastructure</b>                          |          |
|                                                         |          | 7.03 Port infrastructure .....                                  | 109      |
|                                                         |          | 7.02 Railroad infrastructure .....                              | 101      |
|                                                         |          | 7.04 Domestic transport network .....                           | 88       |
|                                                         |          | 7.01 Road infrastructure.....                                   | 85       |
|                                                         |          | <b>Tourism infrastructure</b>                                   |          |
|                                                         |          | 8.02 Presence of major car rental companies.....                | 113      |
|                                                         |          | 8.03 ATMs accepting Visa cards .....                            | 109      |
|                                                         |          | 8.01 Hotel rooms.....                                           | 97       |
|                                                         |          | <b>ICT infrastructure</b>                                       |          |
|                                                         |          | 9.03 Telephone lines.....                                       | 122      |
|                                                         |          | 9.02 Internet users .....                                       | 110      |
|                                                         |          | 9.01 Extent of business Internet use .....                      | 74       |
|                                                         |          | <b>Price competitiveness in the T&amp;T industry</b>            |          |
|                                                         |          | 10.03 Extent and effect of taxation.....                        | 104      |
|                                                         |          | 10.04 Fuel price level .....                                    | 78       |
|                                                         |          | 10.01 Ticket taxes and airport charges.....                     | 75       |
|                                                         |          | <b>Human resources</b>                                          |          |
|                                                         |          | 11.09 Malaria incidence.....                                    | 124      |
|                                                         |          | 11.10 Tuberculosis incidence .....                              | 119      |
|                                                         |          | 11.02 Secondary education enrollment.....                       | 116      |
|                                                         |          | 11.11 Life expectancy .....                                     | 110      |
|                                                         |          | 11.08 HIV prevalence .....                                      | 108      |
|                                                         |          | 11.05 Extent of staff training.....                             | 74       |
|                                                         |          | 11.03 Quality of the educational system .....                   | 64       |
|                                                         |          | 11.04 Local availability of research and training services..... | 61       |
|                                                         |          | <b>National tourism perception</b>                              |          |
|                                                         |          | 12.03 Recommendation to extend business trips .....             | 89       |

(Disadvantages cont'd. from bottom of right column)

&lt;&lt;&lt; (Cont'd. on bottom of left column)

# Ukraine

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 47.1  |
| Surface area (1,000 square kilometers) .....              | 603.7 |
| Gross domestic product (US\$ billions), 2005 .....        | 82.9  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 7,213 |
| Real GDP growth (percent), 2005 .....                     | 2.6   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

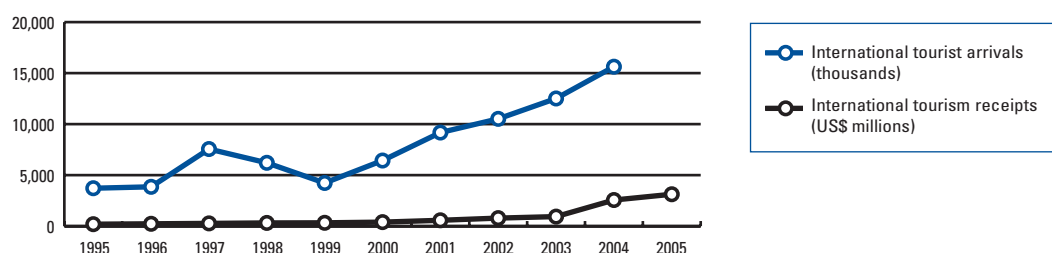
|                               |       | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 1,467 | 1.6                 | 6.3                                         |
| Employment (1,000 jobs) ..... | 254   | 1.2                 | 1.5                                         |

### T&T economy, 2006 estimates

|                               |       |     |      |
|-------------------------------|-------|-----|------|
| GDP (US\$ millions) .....     | 7,888 | 8.3 | 4.5  |
| Employment (1,000 jobs) ..... | 1,395 | 6.8 | -0.2 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |        |
|------------------------------------------------------------|--------|
| International tourist arrivals (1,000), 2004 .....         | 15,629 |
| International tourism receipts (US\$ millions), 2005 ..... | 3,125  |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index .....</b>                                      | <b>78</b>            | <b>3.9</b>           |
| <b>T&amp;T regulatory framework .....</b>                    | <b>76</b>            | <b>4.0</b>           |
| Policy rules and regulations .....                           | 88                   | 4.0                  |
| Environmental regulation .....                               | 109                  | 3.0                  |
| Safety and security .....                                    | 73                   | 4.2                  |
| Health and hygiene .....                                     | 39                   | 5.5                  |
| Prioritization of T&T strategies .....                       | 90                   | 3.3                  |
| <b>T&amp;T business environment and infrastructure .....</b> | <b>73</b>            | <b>3.2</b>           |
| Air transport infrastructure .....                           | 87                   | 2.6                  |
| Ground transport infrastructure .....                        | 67                   | 3.4                  |
| Tourism infrastructure .....                                 | 75                   | 2.7                  |
| ICT infrastructure .....                                     | 64                   | 2.6                  |
| Price competitiveness in T&T industry .....                  | 37                   | 4.9                  |
| <b>T&amp;T human, cultural, and natural resources .....</b>  | <b>89</b>            | <b>4.4</b>           |
| Human resources .....                                        | 73                   | 5.0                  |
| Education and training .....                                 | 68                   | 4.6                  |
| Availability of qualified labor .....                        | 53                   | 4.5                  |
| Workforce wellness .....                                     | 85                   | 5.9                  |
| National tourism perception .....                            | 46                   | 5.2                  |
| Natural and cultural resources .....                         | 118                  | 3.1                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               | Rank/124 | COMPETITIVE DISADVANTAGES                                         | Rank/124 |
|------------------------------------------------------|----------|-------------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                  |          | <b>Policy rules and regulations</b>                               |          |
| 1.04 Visa requirements .....1                        |          | 1.01 Foreign ownership restrictions.....120                       |          |
|                                                      |          | 1.03 Rules governing foreign direct investment .....117           |          |
| <b>Safety and security</b>                           |          | 1.02 Property rights.....113                                      |          |
| 3.01 Business costs of terrorism .....43             |          | 1.05 Openness of bilateral Air Service Agreements .....98         |          |
|                                                      |          |                                                                   |          |
| <b>Health and hygiene</b>                            |          | <b>Environmental regulation</b>                                   |          |
| 4.02 Physician density .....31                       |          | 2.03 Government prioritization of sustainable T&T .....114        |          |
| 4.03 Access to improved sanitation .....36           |          | 2.01 Stringency of environmental regulation .....107              |          |
| 4.04 Access to improved drinking water .....38       |          | 2.02 Clarity and stability of environmental regulations .....98   |          |
|                                                      |          |                                                                   |          |
| <b>Prioritization of Travel &amp; Tourism</b>        |          | <b>Safety and security</b>                                        |          |
| 5.02 T&T government expenditure .....30              |          | 3.02 Reliability of police services .....87                       |          |
|                                                      |          | 3.03 Business costs of crime and violence.....69                  |          |
|                                                      |          |                                                                   |          |
| <b>Air transport infrastructure</b>                  |          | <b>Health and hygiene</b>                                         |          |
| 6.05 Number of operating airlines.....31             |          | 4.01 Gov't efforts to reduce health risks from pandemics .....103 |          |
| 6.04 Airport density .....41                         |          |                                                                   |          |
|                                                      |          |                                                                   |          |
| <b>Ground transport infrastructure</b>               |          | <b>Prioritization of Travel &amp; Tourism</b>                     |          |
| 7.02 Railroad infrastructure .....32                 |          | 5.01 Government prioritization of the T&T industry .....114       |          |
|                                                      |          | 5.03 Effectiveness of marketing and branding .....105             |          |
|                                                      |          | 5.04 T&T fair attendance .....70                                  |          |
|                                                      |          |                                                                   |          |
| <b>Tourism infrastructure</b>                        |          | <b>Air transport infrastructure</b>                               |          |
| 8.03 ATMs accepting Visa cards .....43               |          | 6.06 International air transport network .....110                 |          |
|                                                      |          | 6.01 Quality of air transport infrastructure .....106             |          |
|                                                      |          | 6.03 Departures per 1,000 population.....80                       |          |
|                                                      |          | 6.02 Available seat kilometers.....61                             |          |
|                                                      |          |                                                                   |          |
| <b>ICT infrastructure</b>                            |          | <b>Ground transport infrastructure</b>                            |          |
| 9.03 Telephone lines.....49                          |          | 7.01 Road infrastructure .....104                                 |          |
|                                                      |          | 7.04 Domestic transport network .....76                           |          |
|                                                      |          | 7.03 Port infrastructure .....66                                  |          |
|                                                      |          |                                                                   |          |
| <b>Price competitiveness in the T&amp;T industry</b> |          | <b>Tourism infrastructure</b>                                     |          |
| 10.02 Purchasing power parity .....17                |          | 8.01 Hotel rooms.....99                                           |          |
| 10.04 Fuel price level .....29                       |          | 8.02 Presence of major car rental companies.....66                |          |
|                                                      |          |                                                                   |          |
| <b>Human resources</b>                               |          | <b>ICT infrastructure</b>                                         |          |
| 11.09 Malaria incidence.....1                        |          | 9.01 Extent of business Internet use .....89                      |          |
| 11.06 Hiring and firing practices.....20             |          | 9.02 Internet users .....72                                       |          |
| 11.02 Secondary education enrollment.....45          |          |                                                                   |          |
| 11.03 Quality of the educational system .....47      |          |                                                                   |          |
|                                                      |          |                                                                   |          |
| <b>National tourism perception</b>                   |          | <b>Price competitiveness in the T&amp;T industry</b>              |          |
| 12.01 Tourism openness .....16                       |          | 10.03 Extent and effect of taxation.....101                       |          |
|                                                      |          | 10.01 Ticket taxes and airport charges.....82                     |          |
|                                                      |          |                                                                   |          |
| <b>Natural and cultural resources</b>                |          | <b>Human resources</b>                                            |          |
| 13.05 Risk of malaria and yellow fever .....1        |          | 11.01 Primary education enrollment .....106                       |          |
|                                                      |          | 11.07 Ease of hiring foreign labor .....101                       |          |
|                                                      |          | 11.05 Extent of staff training.....100                            |          |
|                                                      |          | 11.08 HIV prevalence .....95                                      |          |
|                                                      |          | 11.04 Local availability of research and training services.....86 |          |
|                                                      |          | 11.11 Life expectancy .....83                                     |          |
|                                                      |          | 11.10 Tuberculosis incidence .....82                              |          |
|                                                      |          |                                                                   |          |
|                                                      |          | <b>National tourism perception</b>                                |          |
|                                                      |          | 12.02 Attitude toward tourists .....114                           |          |
|                                                      |          | 12.03 Recommendation to extend business trips .....61             |          |
|                                                      |          |                                                                   |          |
|                                                      |          | <b>Natural and cultural resources</b>                             |          |
|                                                      |          | 13.02 Carbon dioxide damage.....120                               |          |
|                                                      |          | 13.04 Business concern for ecosystems .....98                     |          |
|                                                      |          | 13.03 Nationally protected areas.....86                           |          |
|                                                      |          | 13.01 Number of World Heritage sites .....60                      |          |

# United Arab Emirates

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 4.5    |
| Surface area (1,000 square kilometers) .....              | 83.6   |
| Gross domestic product (US\$ billions), 2005 .....        | 129.6  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 27,957 |
| Real GDP growth (percent), 2005 .....                     | 8.5    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

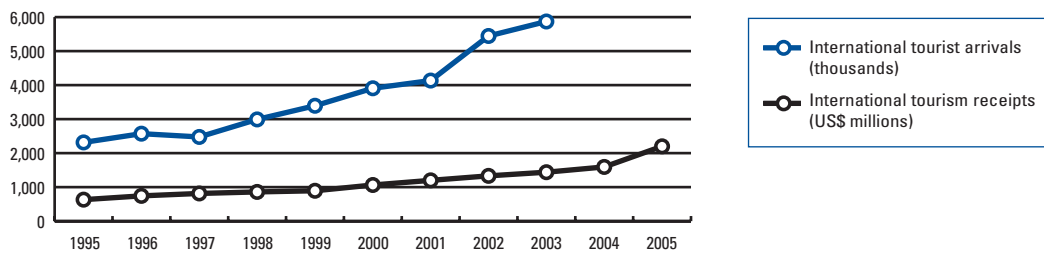
|                               |       | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 1,483 | 1.1                 | 8.7                                         |
| Employment (1,000 jobs) ..... | 40    | 1.6                 | 5.3                                         |

### T&T economy, 2006 estimates

|                               |        |      |     |
|-------------------------------|--------|------|-----|
| GDP (US\$ millions) .....     | 15,736 | 12.1 | 5.2 |
| Employment (1,000 jobs) ..... | 294    | 11.7 | 2.5 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2003 .....         | 5,871 |
| International tourism receipts (US\$ millions), 2005 ..... | 2,200 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index .....</b>                                      | <b>18</b>            | <b>5.1</b>           |
| <b>T&amp;T regulatory framework .....</b>                    | <b>18</b>            | <b>5.3</b>           |
| Policy rules and regulations .....                           | 54                   | 4.8                  |
| Environmental regulation .....                               | 25                   | 5.1                  |
| Safety and security .....                                    | 10                   | 5.8                  |
| Health and hygiene .....                                     | 25                   | 5.8                  |
| Prioritization of T&T strategies .....                       | 23                   | 4.9                  |
| <b>T&amp;T business environment and infrastructure .....</b> | <b>19</b>            | <b>4.7</b>           |
| Air transport infrastructure .....                           | 8                    | 5.0                  |
| Ground transport infrastructure .....                        | 26                   | 4.8                  |
| Tourism infrastructure .....                                 | 24                   | 4.5                  |
| ICT infrastructure .....                                     | 42                   | 3.5                  |
| Price competitiveness in T&T industry .....                  | 8                    | 5.5                  |
| <b>T&amp;T human, cultural, and natural resources .....</b>  | <b>24</b>            | <b>5.3</b>           |
| Human resources .....                                        | 29                   | 5.5                  |
| Education and training .....                                 | 73                   | 4.5                  |
| Availability of qualified labor .....                        | 19                   | 5.1                  |
| Workforce wellness .....                                     | 31                   | 6.8                  |
| National tourism perception .....                            | 3                    | 6.5                  |
| Natural and cultural resources .....                         | 80                   | 3.9                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

# United Arab Emirates

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               |                                                           | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                           | Rank/124 |
|------------------------------------------------------|-----------------------------------------------------------|----------|------------------------------------------------------|-----------------------------------------------------------|----------|
| <b>Environmental regulation</b>                      |                                                           |          | <b>Policy rules and regulations</b>                  |                                                           |          |
| 2.03                                                 | Government prioritization of sustainable T&T .....        | 5        | 1.01                                                 | Foreign ownership restrictions.....                       | 93       |
| <b>Safety and security</b>                           |                                                           |          | 1.05                                                 | Openness of bilateral Air Service Agreements .....        | 44       |
| 3.02                                                 | Reliability of police services .....                      | 11       | 1.04                                                 | Visa requirements .....                                   | 43       |
| 3.03                                                 | Business costs of crime and violence.....                 | 11       | 1.02                                                 | Property rights .....                                     | 42       |
| <b>Health and hygiene</b>                            |                                                           |          | 1.03                                                 | Rules governing foreign direct investment .....           | 37       |
| 4.03                                                 | Access to improved sanitation .....                       | 1        | <b>Environmental regulation</b>                      |                                                           |          |
| 4.04                                                 | Access to improved drinking water .....                   | 1        | 2.01                                                 | Stringency of environmental regulation .....              | 35       |
| 4.01                                                 | Gov't efforts to reduce health risks from pandemics ..... | 9        | 2.02                                                 | Clarity and stability of environmental regulations .....  | 30       |
| <b>Prioritization of Travel &amp; Tourism</b>        |                                                           |          | <b>Safety and security</b>                           |                                                           |          |
| 5.03                                                 | Effectiveness of marketing and branding .....             | 1        | 3.01                                                 | Business costs of terrorism .....                         | 42       |
| 5.01                                                 | Government prioritization of the T&T industry.....        | 4        | <b>Health and hygiene</b>                            |                                                           |          |
| 5.04                                                 | T&T fair attendance .....                                 | 15       | 4.02                                                 | Physician density.....                                    | 52       |
| <b>Air transport infrastructure</b>                  |                                                           |          | <b>Prioritization of Travel &amp; Tourism</b>        |                                                           |          |
| 6.06                                                 | International air transport network .....                 | 6        | 5.02                                                 | T&T government expenditure .....                          | 91       |
| 6.01                                                 | Quality of air transport infrastructure .....             | 7        | <b>Air transport infrastructure</b>                  |                                                           |          |
| 6.05                                                 | Number of operating airlines.....                         | 13       | 6.04                                                 | Airport density .....                                     | 43       |
| 6.03                                                 | Departures per 1,000 population.....                      | 15       | 6.02                                                 | Available seat kilometers.....                            | 20       |
| <b>Ground transport infrastructure</b>               |                                                           |          | <b>Ground transport infrastructure</b>               |                                                           |          |
| 7.03                                                 | Port infrastructure .....                                 | 9        | 7.02                                                 | Railroad infrastructure .....                             | 73       |
| 7.01                                                 | Road infrastructure.....                                  | 12       | 7.04                                                 | Domestic transport network .....                          | 30       |
| <b>Tourism infrastructure</b>                        |                                                           |          | <b>Tourism infrastructure</b>                        |                                                           |          |
| 8.02                                                 | Presence of major car rental companies.....               | 1        | 8.03                                                 | ATMs accepting Visa cards .....                           | 37       |
| <b>Price competitiveness in the T&amp;T industry</b> |                                                           |          | 8.01                                                 | Hotel rooms.....                                          | 29       |
| 10.01                                                | Ticket taxes and airport charges.....                     | 3        | <b>ICT infrastructure</b>                            |                                                           |          |
| 10.03                                                | Extent and effect of taxation.....                        | 3        | 9.01                                                 | Extent of business Internet use .....                     | 45       |
| 10.04                                                | Fuel price level .....                                    | 13       | 9.03                                                 | Telephone lines.....                                      | 45       |
| <b>Human resources</b>                               |                                                           |          | 9.02                                                 | Internet users .....                                      | 36       |
| 11.09                                                | Malaria incidence.....                                    | 1        | <b>Price competitiveness in the T&amp;T industry</b> |                                                           |          |
| <b>National tourism perception</b>                   |                                                           |          | 10.02                                                | Purchasing power parity.....                              | 101      |
| 12.02                                                | Attitude toward tourists .....                            | 5        | <b>Human resources</b>                               |                                                           |          |
| 12.03                                                | Recommendation to extend business trips .....             | 7        | 11.01                                                | Primary education enrollment .....                        | 115      |
| <b>Natural and cultural resources</b>                |                                                           |          | 11.02                                                | Secondary education enrollment.....                       | 88       |
| 13.05                                                | Risk of malaria and yellow fever .....                    | 1        | 11.08                                                | HIV prevalence .....                                      | 47       |
|                                                      |                                                           |          | 11.04                                                | Local availability of research and training services..... | 42       |
|                                                      |                                                           |          | 11.05                                                | Extent of staff training.....                             | 37       |
|                                                      |                                                           |          | 11.10                                                | Tuberculosis incidence .....                              | 35       |
|                                                      |                                                           |          | 11.03                                                | Quality of the educational system .....                   | 32       |
|                                                      |                                                           |          | 11.11                                                | Life expectancy .....                                     | 29       |
|                                                      |                                                           |          | 11.06                                                | Hiring and firing practices.....                          | 23       |
|                                                      |                                                           |          | 11.07                                                | Ease of hiring foreign labor .....                        | 20       |
|                                                      |                                                           |          | <b>Natural and cultural resources</b>                |                                                           |          |
|                                                      |                                                           |          | 13.03                                                | Nationally protected areas.....                           | 109      |
|                                                      |                                                           |          | 13.01                                                | Number of World Heritage sites .....                      | 107      |
|                                                      |                                                           |          | 13.02                                                | Carbon dioxide damage.....                                | 84       |
|                                                      |                                                           |          | 13.04                                                | Business concern for ecosystems .....                     | 34       |

# United Kingdom

## Key indicators

|                                                           |         |
|-----------------------------------------------------------|---------|
| Population (millions), 2005 .....                         | 60.2    |
| Surface area (1,000 square kilometers) .....              | 243.6   |
| Gross domestic product (US\$ billions), 2005 .....        | 2,229.5 |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 30,436  |
| Real GDP growth (percent), 2005 .....                     | 1.9     |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

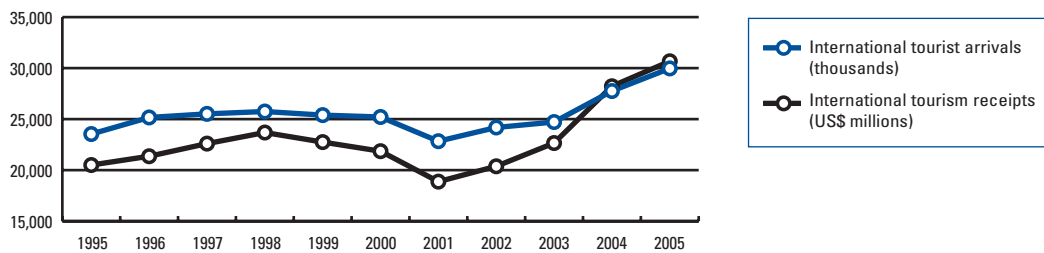
|                               |        | Percent of total | 2007–2016 annual growth (% forecast) |
|-------------------------------|--------|------------------|--------------------------------------|
| GDP (US\$ millions) .....     | 79,874 | 3.5              | 1.8                                  |
| Employment (1,000 jobs) ..... | 986    | 3.2              | –0.6                                 |

### T&T economy, 2006 estimates

|                               |         |     |      |
|-------------------------------|---------|-----|------|
| GDP (US\$ millions) .....     | 212,793 | 9.4 | 2.4  |
| Employment (1,000 jobs) ..... | 2,661   | 8.6 | –0.1 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |        |
|------------------------------------------------------------|--------|
| International tourist arrivals (1,000), 2005 .....         | 29,970 |
| International tourism receipts (US\$ millions), 2005 ..... | 30,669 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank (out of 124) | Score (1–7 scale) |
|--------------------------------------------------------------|-------------------|-------------------|
| <b>2007 Index</b> .....                                      | <b>10</b>         | <b>5.3</b>        |
| <b>T&amp;T regulatory framework</b> .....                    | <b>21</b>         | <b>5.2</b>        |
| Policy rules and regulations .....                           | 11                | 5.5               |
| Environmental regulation .....                               | 14                | 5.5               |
| Safety and security .....                                    | 44                | 4.9               |
| Health and hygiene .....                                     | 33                | 5.7               |
| Prioritization of T&T strategies .....                       | 35                | 4.4               |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>6</b>          | <b>5.1</b>        |
| Air transport infrastructure .....                           | 3                 | 5.6               |
| Ground transport infrastructure .....                        | 16                | 5.5               |
| Tourism infrastructure .....                                 | 19                | 5.2               |
| ICT infrastructure .....                                     | 5                 | 5.7               |
| Price competitiveness in T&T industry .....                  | 120               | 3.3               |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>10</b>         | <b>5.6</b>        |
| Human resources .....                                        | 6                 | 6.0               |
| Education and training .....                                 | 12                | 6.0               |
| Availability of qualified labor .....                        | 20                | 5.1               |
| Workforce wellness .....                                     | 17                | 6.9               |
| National tourism perception .....                            | 94                | 4.4               |
| Natural and cultural resources .....                         | 5                 | 6.3               |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."



## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                          | Rank/124 | COMPETITIVE DISADVANTAGES                                      | Rank/124 |
|-----------------------------------------------------------------|----------|----------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                             |          | <b>Policy rules and regulations</b>                            |          |
| 1.01 Foreign ownership restrictions.....                        | 5        | 1.04 Visa requirements .....                                   | 43       |
| 1.02 Property rights.....                                       | 6        | 1.05 Openness of bilateral Air Service Agreements .....        | 38       |
| 1.03 Rules governing foreign direct investment .....            | 7        |                                                                |          |
| <b>Health and hygiene</b>                                       |          | <b>Environmental regulation</b>                                |          |
| 4.03 Access to improved sanitation .....                        | 1        | 2.03 Government prioritization of sustainable T&T .....        | 44       |
| 4.04 Access to improved drinking water .....                    | 1        | 2.01 Stringency of environmental regulation .....              | 13       |
|                                                                 |          | 2.02 Clarity and stability of environmental regulations .....  | 11       |
| <b>Air transport infrastructure</b>                             |          | <b>Safety and security</b>                                     |          |
| 6.05 Number of operating airlines.....                          | 2        | 3.01 Business costs of terrorism .....                         | 112      |
| 6.02 Available seat kilometers.....                             | 3        | 3.03 Business costs of crime and violence.....                 | 31       |
| 6.06 International air transport network .....                  | 4        | 3.02 Reliability of police services .....                      | 19       |
| 6.01 Quality of air transport infrastructure .....              | 6        |                                                                |          |
| <b>Tourism infrastructure</b>                                   |          | <b>Health and hygiene</b>                                      |          |
| 8.02 Presence of major car rental companies.....                | 1        | 4.01 Gov't efforts to reduce health risks from pandemics ..... | 46       |
|                                                                 |          | 4.02 Physician density .....                                   | 44       |
| <b>ICT infrastructure</b>                                       |          | <b>Prioritization of Travel &amp; Tourism</b>                  |          |
| 9.01 Extent of business Internet use .....                      | 2        | 5.02 T&T government expenditure .....                          | 67       |
| 9.02 Internet users .....                                       | 8        | 5.01 Government prioritization of the T&T industry.....        | 63       |
|                                                                 |          | 5.03 Effectiveness of marketing and branding .....             | 29       |
| <b>Human resources</b>                                          |          | 5.04 T&T fair attendance .....                                 | 15       |
| 11.01 Primary education enrollment .....                        | 1        |                                                                |          |
| 11.02 Secondary education enrollment.....                       | 1        | <b>Air transport infrastructure</b>                            |          |
| 11.09 Malaria incidence.....                                    | 1        | 6.04 Airport density .....                                     | 56       |
| 11.04 Local availability of research and training services..... | 3        | 6.03 Departures per 1,000 population.....                      | 20       |
| <b>Natural and cultural resources</b>                           |          |                                                                |          |
| 13.05 Risk of malaria and yellow fever .....                    | 1        | <b>Ground transport infrastructure</b>                         |          |
| 13.01 Number of World Heritage sites .....                      | 6        | 7.02 Railroad infrastructure .....                             | 20       |
|                                                                 |          | 7.03 Port infrastructure .....                                 | 19       |
|                                                                 |          | 7.04 Domestic transport network .....                          | 16       |
|                                                                 |          | 7.01 Road infrastructure.....                                  | 14       |
|                                                                 |          | <b>Tourism infrastructure</b>                                  |          |
|                                                                 |          | 8.01 Hotel rooms.....                                          | 25       |
|                                                                 |          | 8.03 ATMs accepting Visa cards .....                           | 12       |
|                                                                 |          | <b>ICT infrastructure</b>                                      |          |
|                                                                 |          | 9.03 Telephone lines.....                                      | 12       |
|                                                                 |          | <b>Price competitiveness in the T&amp;T industry</b>           |          |
|                                                                 |          | 10.04 Fuel price level .....                                   | 123      |
|                                                                 |          | 10.02 Purchasing power parity.....                             | 114      |
|                                                                 |          | 10.01 Ticket taxes and airport charges.....                    | 79       |
|                                                                 |          | 10.03 Extent and effect of taxation.....                       | 25       |
|                                                                 |          | <b>Human resources</b>                                         |          |
|                                                                 |          | 11.08 HIV prevalence .....                                     | 48       |
|                                                                 |          | 11.06 Hiring and firing practices.....                         | 32       |
|                                                                 |          | 11.03 Quality of the educational system .....                  | 29       |
|                                                                 |          | 11.10 Tuberculosis incidence .....                             | 18       |
|                                                                 |          | 11.05 Extent of staff training.....                            | 16       |
|                                                                 |          | 11.11 Life expectancy .....                                    | 15       |
|                                                                 |          | 11.07 Ease of hiring foreign labor .....                       | 13       |
|                                                                 |          | <b>National tourism perception</b>                             |          |
|                                                                 |          | 12.03 Recommendation to extend business trips .....            | 97       |
|                                                                 |          | 12.01 Tourism openness .....                                   | 69       |
|                                                                 |          | 12.02 Attitude toward tourists .....                           | 62       |
|                                                                 |          | <b>Natural and cultural resources</b>                          |          |
|                                                                 |          | 13.02 Carbon dioxide damage.....                               | 16       |
|                                                                 |          | 13.03 Nationally protected areas.....                          | 14       |
|                                                                 |          | 13.04 Business concern for ecosystems .....                    | 11       |

# United States

## Key indicators

|                                                           |          |
|-----------------------------------------------------------|----------|
| Population (millions), 2005 .....                         | 296.5    |
| Surface area (1,000 square kilometers) .....              | 9,629.1  |
| Gross domestic product (US\$ billions), 2005 .....        | 12,455.8 |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 41,399   |
| Real GDP growth (percent), 2005 .....                     | 3.2      |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

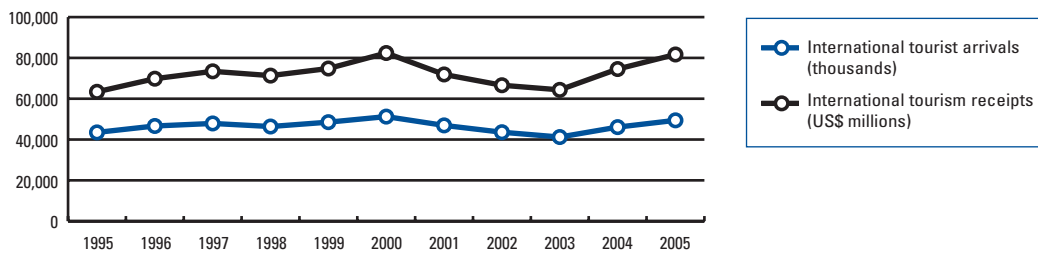
|                               |         | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|---------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 518,336 | 3.9                 | 2.5                                         |
| Employment (1,000 jobs) ..... | 5,834   | 4.1                 | 0.1                                         |

### T&T economy, 2006 estimates

|                               |           |      |     |
|-------------------------------|-----------|------|-----|
| GDP (US\$ millions) .....     | 1,390,791 | 10.5 | 2.9 |
| Employment (1,000 jobs) ..... | 15,604    | 10.9 | 0.5 |

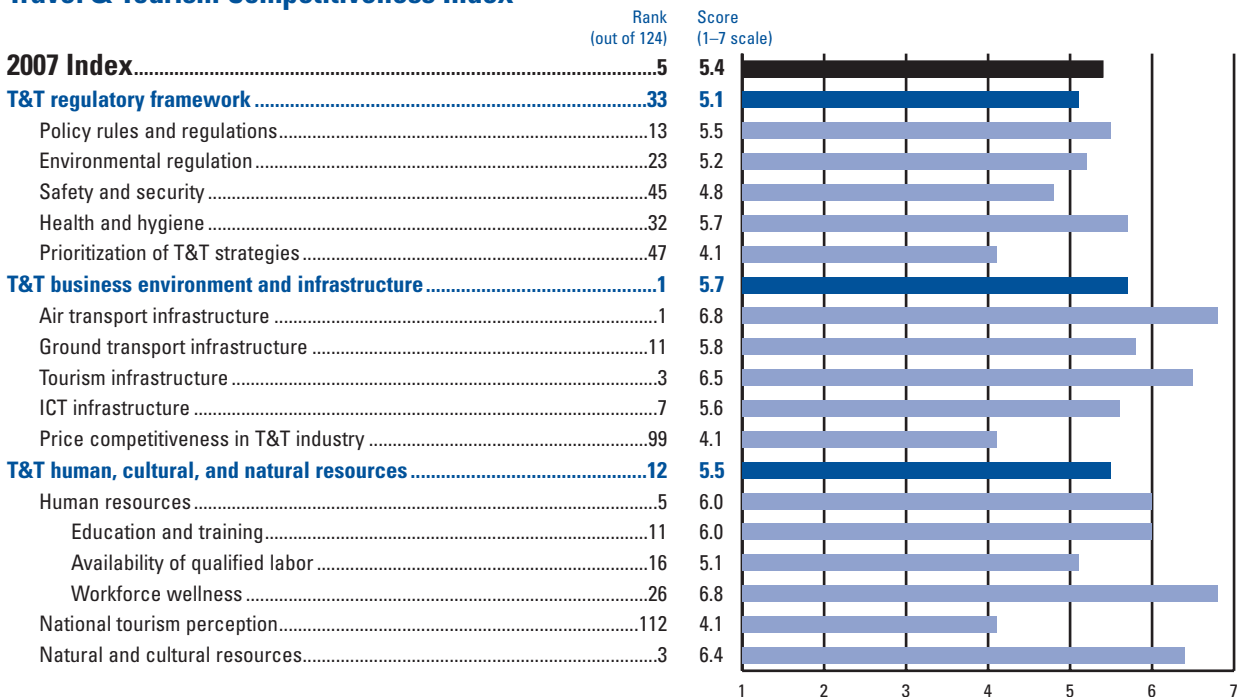
Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |        |
|------------------------------------------------------------|--------|
| International tourist arrivals (1,000), 2005 .....         | 49,402 |
| International tourism receipts (US\$ millions), 2005 ..... | 81,680 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index



Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                 |                                                           | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                           | Rank/124 |
|----------------------------------------|-----------------------------------------------------------|----------|------------------------------------------------------|-----------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>    |                                                           |          | <b>Policy rules and regulations</b>                  |                                                           |          |
| 1.05                                   | Openness of bilateral Air Service Agreements .....        | 8        | 1.03                                                 | Rules governing foreign direct investment .....           | 44       |
| <b>Health and hygiene</b>              |                                                           |          | 1.01                                                 | Foreign ownership restrictions.....                       | 43       |
| 4.03                                   | Access to improved sanitation .....                       | 1        | 1.04                                                 | Visa requirements .....                                   | 43       |
| 4.04                                   | Access to improved drinking water .....                   | 1        | 1.02                                                 | Property rights .....                                     | 21       |
| <b>Air transport infrastructure</b>    |                                                           |          | <b>Environmental regulation</b>                      |                                                           |          |
| 6.02                                   | Available seat kilometers.....                            | 1        | 2.03                                                 | Government prioritization of sustainable T&T .....        | 49       |
| 6.05                                   | Number of operating airlines.....                         | 1        | 2.01                                                 | Stringency of environmental regulation .....              | 21       |
| 6.04                                   | Airport density.....                                      | 8        | 2.02                                                 | Clarity and stability of environmental regulations .....  | 19       |
| 6.03                                   | Departures per 1,000 population.....                      | 10       | <b>Safety and security</b>                           |                                                           |          |
| <b>Ground transport infrastructure</b> |                                                           |          | 3.01                                                 | Business costs of terrorism .....                         | 110      |
| 7.01                                   | Road infrastructure .....                                 | 7        | 3.03                                                 | Business costs of crime and violence.....                 | 42       |
| <b>Tourism infrastructure</b>          |                                                           |          | 3.02                                                 | Reliability of police services .....                      | 16       |
| 8.02                                   | Presence of major car rental companies.....               | 1        | <b>Health and hygiene</b>                            |                                                           |          |
| 8.03                                   | ATMs accepting Visa cards .....                           | 1        | 4.01                                                 | Gov't efforts to reduce health risks from pandemics ..... | 60       |
| <b>ICT infrastructure</b>              |                                                           |          | 4.02                                                 | Physician density .....                                   | 37       |
| 9.02                                   | Internet users .....                                      | 6        | <b>Prioritization of Travel &amp; Tourism</b>        |                                                           |          |
| 9.03                                   | Telephone lines.....                                      | 8        | 5.01                                                 | Government prioritization of the T&T industry.....        | 84       |
| <b>Human resources</b>                 |                                                           |          | 5.03                                                 | Effectiveness of marketing and branding .....             | 54       |
| 11.09                                  | Malaria incidence.....                                    | 1        | 5.04                                                 | T&T fair attendance .....                                 | 35       |
| 11.10                                  | Tuberculosis incidence .....                              | 3        | 5.02                                                 | T&T government expenditure .....                          | 29       |
| 11.04                                  | Local availability of research and training services..... | 5        | <b>Air transport infrastructure</b>                  |                                                           |          |
| 11.05                                  | Extent of staff training.....                             | 9        | 6.06                                                 | International air transport network .....                 | 14       |
| <b>Natural and cultural resources</b>  |                                                           |          | 6.01                                                 | Quality of air transport infrastructure .....             | 11       |
| 13.05                                  | Risk of malaria and yellow fever .....                    | 1        | <b>Ground transport infrastructure</b>               |                                                           |          |
| 13.01                                  | Number of World Heritage sites .....                      | 10       | 7.02                                                 | Railroad infrastructure .....                             | 15       |
| 13.03                                  | Nationally protected areas.....                           | 10       | 7.03                                                 | Port infrastructure .....                                 | 15       |
|                                        |                                                           |          | 7.04                                                 | Domestic transport network .....                          | 11       |
|                                        |                                                           |          | <b>Tourism infrastructure</b>                        |                                                           |          |
|                                        |                                                           |          | 8.01                                                 | Hotel rooms.....                                          | 13       |
|                                        |                                                           |          | <b>ICT infrastructure</b>                            |                                                           |          |
|                                        |                                                           |          | 9.01                                                 | Extent of business Internet use .....                     | 12       |
|                                        |                                                           |          | <b>Price competitiveness in the T&amp;T industry</b> |                                                           |          |
|                                        |                                                           |          | 10.01                                                | Ticket taxes and airport charges.....                     | 109      |
|                                        |                                                           |          | 10.02                                                | Purchasing power parity.....                              | 99       |
|                                        |                                                           |          | 10.04                                                | Fuel price level .....                                    | 43       |
|                                        |                                                           |          | 10.03                                                | Extent and effect of taxation.....                        | 31       |
|                                        |                                                           |          | <b>Human resources</b>                               |                                                           |          |
|                                        |                                                           |          | 11.01                                                | Primary education enrollment .....                        | 86       |
|                                        |                                                           |          | 11.08                                                | HIV prevalence .....                                      | 78       |
|                                        |                                                           |          | 11.07                                                | Ease of hiring foreign labor .....                        | 43       |
|                                        |                                                           |          | 11.02                                                | Secondary education enrollment.....                       | 41       |
|                                        |                                                           |          | 11.11                                                | Life expectancy .....                                     | 24       |
|                                        |                                                           |          | 11.03                                                | Quality of the educational system .....                   | 15       |
|                                        |                                                           |          | 11.06                                                | Hiring and firing practices.....                          | 11       |
|                                        |                                                           |          | <b>National tourism perception</b>                   |                                                           |          |
|                                        |                                                           |          | 12.02                                                | Attitude toward tourists .....                            | 101      |
|                                        |                                                           |          | 12.01                                                | Tourism openness .....                                    | 99       |
|                                        |                                                           |          | 12.03                                                | Recommendation to extend business trips .....             | 90       |
|                                        |                                                           |          | <b>Natural and cultural resources</b>                |                                                           |          |
|                                        |                                                           |          | 13.02                                                | Carbon dioxide damage.....                                | 46       |
|                                        |                                                           |          | 13.04                                                | Business concern for ecosystems .....                     | 17       |

# Uruguay

## Key indicators

|                                                           |        |
|-----------------------------------------------------------|--------|
| Population (millions), 2005 .....                         | 3.5    |
| Surface area (1,000 square kilometers) .....              | 176.2  |
| Gross domestic product (US\$ billions), 2005 .....        | 16.9   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 10,720 |
| Real GDP growth (percent), 2005 .....                     | 6.6    |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

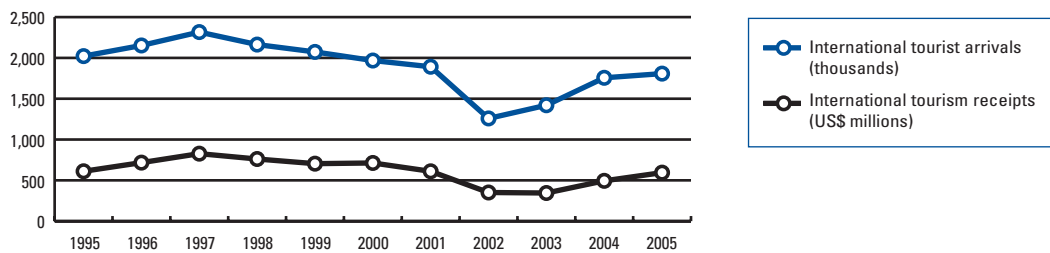
|                               |     | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-----|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 855 | 4.6                 | 3.8                                         |
| Employment (1,000 jobs) ..... | 77  | 5.5                 | 1.6                                         |

### T&T economy, 2006 estimates

|                               |       |      |     |
|-------------------------------|-------|------|-----|
| GDP (US\$ millions) .....     | 1,996 | 10.7 | 3.9 |
| Employment (1,000 jobs) ..... | 166   | 11.8 | 1.7 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 1,808 |
| International tourism receipts (US\$ millions), 2005 ..... | 594   |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index .....</b>                                      | <b>56</b>            | <b>4.3</b>           |
| <b>T&amp;T regulatory framework .....</b>                    | <b>43</b>            | <b>4.8</b>           |
| Policy rules and regulations .....                           | 50                   | 4.8                  |
| Environmental regulation .....                               | 50                   | 4.3                  |
| Safety and security .....                                    | 60                   | 4.6                  |
| Health and hygiene .....                                     | 20                   | 5.9                  |
| Prioritization of T&T strategies .....                       | 44                   | 4.1                  |
| <b>T&amp;T business environment and infrastructure .....</b> | <b>67</b>            | <b>3.3</b>           |
| Air transport infrastructure .....                           | 92                   | 2.5                  |
| Ground transport infrastructure .....                        | 64                   | 3.5                  |
| Tourism infrastructure .....                                 | 69                   | 2.8                  |
| ICT infrastructure .....                                     | 47                   | 3.3                  |
| Price competitiveness in T&T industry .....                  | 70                   | 4.5                  |
| <b>T&amp;T human, cultural, and natural resources .....</b>  | <b>64</b>            | <b>4.8</b>           |
| Human resources .....                                        | 51                   | 5.2                  |
| Education and training .....                                 | 54                   | 4.9                  |
| Availability of qualified labor .....                        | 76                   | 4.2                  |
| Workforce wellness .....                                     | 37                   | 6.7                  |
| National tourism perception .....                            | 64                   | 4.8                  |
| Natural and cultural resources .....                         | 71                   | 4.2                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                          | Rank/124 | COMPETITIVE DISADVANTAGES                                         | Rank/124 |
|-----------------------------------------------------------------|----------|-------------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                             |          | <b>Policy rules and regulations</b>                               |          |
| 1.04 Visa requirements .....15                                  |          | 1.03 Rules governing foreign direct investment .....77            |          |
| 1.05 Openness of bilateral Air Service Agreements .....45       |          | 1.01 Foreign ownership restrictions.....55                        |          |
|                                                                 |          | 1.02 Property rights.....55                                       |          |
| <b>Environmental regulation</b>                                 |          | <b>Environmental regulation</b>                                   |          |
| 2.01 Stringency of environmental regulation .....46             |          | 2.03 Government prioritization of sustainable T&T .....67         |          |
| 2.02 Clarity and stability of environmental regulations .....46 |          |                                                                   |          |
| <b>Safety and security</b>                                      |          | <b>Safety and security</b>                                        |          |
| 3.01 Business costs of terrorism .....2                         |          | 3.03 Business costs of crime and violence.....83                  |          |
|                                                                 |          | 3.02 Reliability of police services .....70                       |          |
| <b>Health and hygiene</b>                                       |          | <b>Health and hygiene</b>                                         |          |
| 4.02 Physician density.....9                                    |          | 4.01 Gov't efforts to reduce health risks from pandemics .....61  |          |
| 4.04 Access to improved drinking water .....38                  |          |                                                                   |          |
| 4.03 Access to improved sanitation .....41                      |          | <b>Prioritization of Travel &amp; Tourism</b>                     |          |
|                                                                 |          | 5.03 Effectiveness of marketing and branding .....58              |          |
| <b>Prioritization of Travel &amp; Tourism</b>                   |          | <b>Air transport infrastructure</b>                               |          |
| 5.02 T&T government expenditure .....30                         |          | 6.01 Quality of air transport infrastructure .....101             |          |
| 5.01 Government prioritization of the T&T industry.....45       |          | 6.05 Number of operating airlines.....97                          |          |
| 5.04 T&T fair attendance .....48                                |          | 6.02 Available seat kilometers.....96                             |          |
| <b>Air transport infrastructure</b>                             |          | 6.06 International air transport network .....90                  |          |
| 6.04 Airport density.....31                                     |          | 6.03 Departures per 1,000 population.....54                       |          |
| <b>Ground transport infrastructure</b>                          |          | <b>Ground transport infrastructure</b>                            |          |
| 7.01 Road infrastructure.....46                                 |          | 7.02 Railroad infrastructure .....95                              |          |
| 7.03 Port infrastructure .....46                                |          | 7.04 Domestic transport network .....69                           |          |
| <b>Tourism infrastructure</b>                                   |          | <b>Tourism infrastructure</b>                                     |          |
| 8.01 Hotel rooms.....45                                         |          | 8.03 ATMs accepting Visa cards .....75                            |          |
| <b>ICT infrastructure</b>                                       |          | 8.02 Presence of major car rental companies.....66                |          |
| 9.03 Telephone lines.....41                                     |          | <b>ICT infrastructure</b>                                         |          |
| 9.02 Internet users .....48                                     |          | 9.01 Extent of business Internet use .....54                      |          |
| <b>Human resources</b>                                          |          | <b>Price competitiveness in the T&amp;T industry</b>              |          |
| 11.01 Primary education enrollment .....1                       |          | 10.03 Extent and effect of taxation.....95                        |          |
| 11.02 Secondary education enrollment.....1                      |          | 10.01 Ticket taxes and airport charges.....66                     |          |
| 11.07 Ease of hiring foreign labor .....29                      |          | 10.04 Fuel price level .....66                                    |          |
| 11.11 Life expectancy .....39                                   |          | 10.02 Purchasing power parity.....59                              |          |
| 11.10 Tuberculosis incidence .....40                            |          |                                                                   |          |
| <b>National tourism perception</b>                              |          | <b>Human resources</b>                                            |          |
| 12.02 Attitude toward tourists .....33                          |          | 11.06 Hiring and firing practices.....101                         |          |
| 12.03 Recommendation to extend business trips .....35           |          | 11.05 Extent of staff training.....80                             |          |
| <b>Natural and cultural resources</b>                           |          | 11.03 Quality of the educational system .....75                   |          |
| 13.05 Risk of malaria and yellow fever .....1                   |          | 11.04 Local availability of research and training services.....64 |          |
| 13.04 Business concern for ecosystems .....30                   |          | 11.08 HIV prevalence .....62                                      |          |
| 13.02 Carbon dioxide damage.....33                              |          | <b>National tourism perception</b>                                |          |
|                                                                 |          | 12.01 Tourism openness .....62                                    |          |
|                                                                 |          | <b>Natural and cultural resources</b>                             |          |
|                                                                 |          | 13.03 Nationally protected areas.....106                          |          |
|                                                                 |          | 13.01 Number of World Heritage sites .....87                      |          |

# Venezuela

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 26.6  |
| Surface area (1,000 square kilometers) .....              | 912.1 |
| Gross domestic product (US\$ billions), 2005 .....        | 132.8 |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 6,186 |
| Real GDP growth (percent), 2005 .....                     | 9.3   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

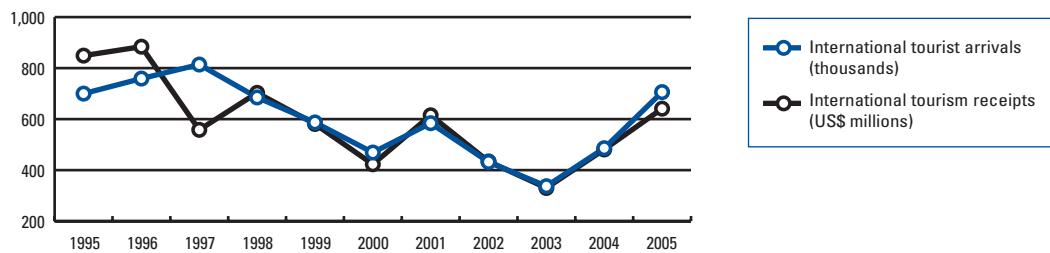
|                               |       | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 2,602 | 1.9                 | 4.1                                         |
| Employment (1,000 jobs) ..... | 205   | 2.0                 | 3.5                                         |

### T&T economy, 2006 estimates

|                               |        |     |     |
|-------------------------------|--------|-----|-----|
| GDP (US\$ millions) .....     | 12,551 | 9.0 | 3.2 |
| Employment (1,000 jobs) ..... | 855    | 8.2 | 2.7 |

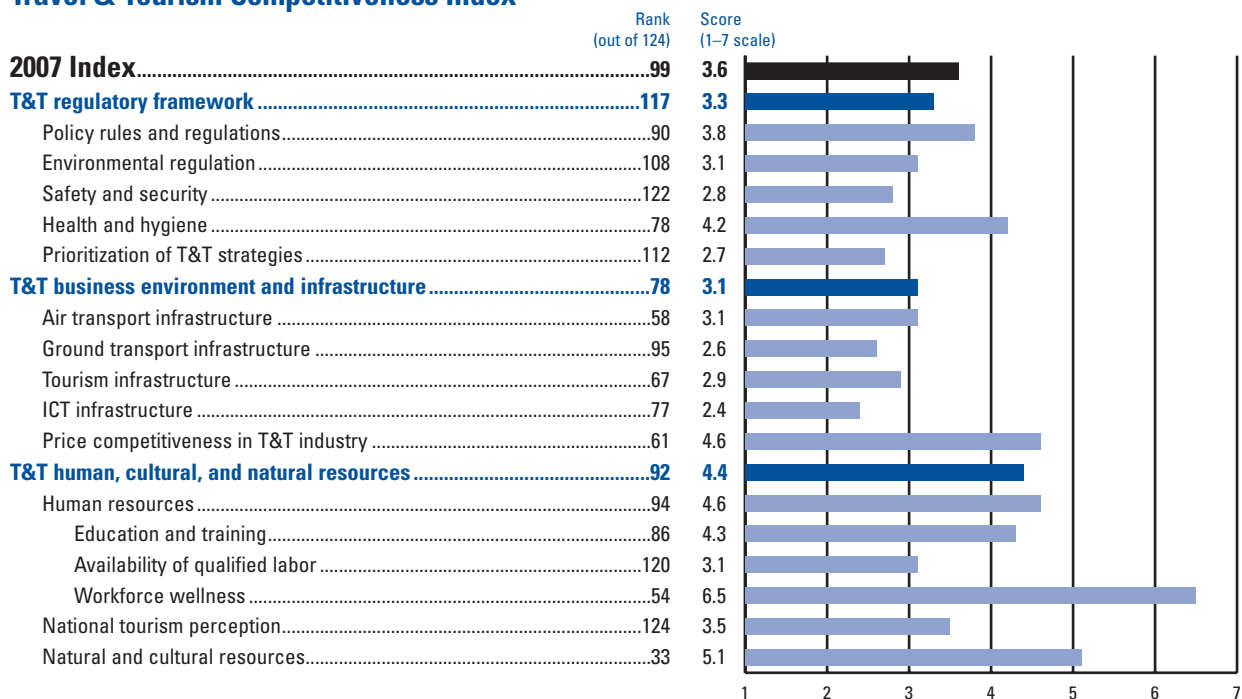
Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2005 .....         | 706 |
| International tourism receipts (US\$ millions), 2005 ..... | 641 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index



Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               | Rank/124 | COMPETITIVE DISADVANTAGES                                          | Rank/124 |
|------------------------------------------------------|----------|--------------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                  |          | <b>Policy rules and regulations</b>                                |          |
| 1.04 Visa requirements .....15                       |          | 1.02 Property rights .....123                                      |          |
|                                                      |          | 1.03 Rules governing foreign direct investment .....120            |          |
| <b>Prioritization of Travel &amp; Tourism</b>        |          | 1.01 Foreign ownership restrictions .....102                       |          |
| 5.04 T&T fair attendance .....48                     |          | 1.05 Openness of bilateral Air Service Agreements .....84          |          |
|                                                      |          |                                                                    |          |
| <b>Air transport infrastructure</b>                  |          | <b>Environmental regulation</b>                                    |          |
| 6.04 Airport density .....40                         |          | 2.03 Government prioritization of sustainable T&T .....122         |          |
| 6.05 Number of operating airlines .....45            |          | 2.02 Clarity and stability of environmental regulations .....104   |          |
| 6.02 Available seat kilometers .....47               |          | 2.01 Stringency of environmental regulation .....73                |          |
|                                                      |          |                                                                    |          |
| <b>Price competitiveness in the T&amp;T industry</b> |          | <b>Safety and security</b>                                         |          |
| 10.04 Fuel price level .....1                        |          | 3.02 Reliability of police services .....123                       |          |
|                                                      |          | 3.03 Business costs of crime and violence .....123                 |          |
| <b>Human resources</b>                               |          | 3.01 Business costs of terrorism .....94                           |          |
| 11.01 Primary education enrollment .....1            |          |                                                                    |          |
| 11.11 Life expectancy .....39                        |          | <b>Health and hygiene</b>                                          |          |
|                                                      |          | 4.01 Gov't efforts to reduce health risks from pandemics .....121  |          |
| <b>Natural and cultural resources</b>                |          | 4.04 Access to improved drinking water .....74                     |          |
| 13.03 Nationally protected areas .....1              |          | 4.03 Access to improved sanitation .....66                         |          |
|                                                      |          | 4.02 Physician density .....55                                     |          |
|                                                      |          |                                                                    |          |
|                                                      |          | <b>Prioritization of Travel &amp; Tourism</b>                      |          |
|                                                      |          | 5.01 Government prioritization of the T&T industry .....124        |          |
|                                                      |          | 5.03 Effectiveness of marketing and branding .....124              |          |
|                                                      |          | 5.02 T&T government expenditure .....54                            |          |
|                                                      |          |                                                                    |          |
|                                                      |          | <b>Air transport infrastructure</b>                                |          |
|                                                      |          | 6.01 Quality of air transport infrastructure .....79               |          |
|                                                      |          | 6.06 International air transport network .....72                   |          |
|                                                      |          |                                                                    |          |
|                                                      |          | <b>Ground transport infrastructure</b>                             |          |
|                                                      |          | 7.02 Railroad infrastructure .....108                              |          |
|                                                      |          | 7.01 Road infrastructure .....93                                   |          |
|                                                      |          | 7.04 Domestic transport network .....90                            |          |
|                                                      |          | 7.03 Port infrastructure .....85                                   |          |
|                                                      |          |                                                                    |          |
|                                                      |          | <b>Tourism infrastructure</b>                                      |          |
|                                                      |          | 8.03 ATMs accepting Visa cards .....67                             |          |
|                                                      |          | 8.01 Hotel rooms .....59                                           |          |
|                                                      |          | 8.02 Presence of major car rental companies .....55                |          |
|                                                      |          |                                                                    |          |
|                                                      |          | <b>ICT infrastructure</b>                                          |          |
|                                                      |          | 9.01 Extent of business Internet use .....79                       |          |
|                                                      |          | 9.03 Telephone lines .....73                                       |          |
|                                                      |          | 9.02 Internet users .....69                                        |          |
|                                                      |          |                                                                    |          |
|                                                      |          | <b>Price competitiveness in the T&amp;T industry</b>               |          |
|                                                      |          | 10.01 Ticket taxes and airport charges .....106                    |          |
|                                                      |          | 10.02 Purchasing power parity .....92                              |          |
|                                                      |          | 10.03 Extent and effect of taxation .....71                        |          |
|                                                      |          |                                                                    |          |
|                                                      |          | <b>Human resources</b>                                             |          |
|                                                      |          | 11.06 Hiring and firing practices .....124                         |          |
|                                                      |          | 11.03 Quality of the educational system .....112                   |          |
|                                                      |          | 11.07 Ease of hiring foreign labor .....100                        |          |
|                                                      |          | 11.09 Malaria incidence .....95                                    |          |
|                                                      |          | 11.04 Local availability of research and training services .....92 |          |
|                                                      |          | 11.02 Secondary education enrollment .....84                       |          |
|                                                      |          | 11.05 Extent of staff training .....82                             |          |
|                                                      |          | 11.08 HIV prevalence .....82                                       |          |
|                                                      |          | 11.10 Tuberculosis incidence .....53                               |          |

(Disadvantages cont'd. from bottom of right column)

&lt;&lt;&lt; (Cont'd. on bottom of left column)

# Vietnam

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 83.0  |
| Surface area (1,000 square kilometers) .....              | 331.7 |
| Gross domestic product (US\$ billions), 2005 .....        | 51.4  |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 3,025 |
| Real GDP growth (percent), 2005 .....                     | 8.4   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

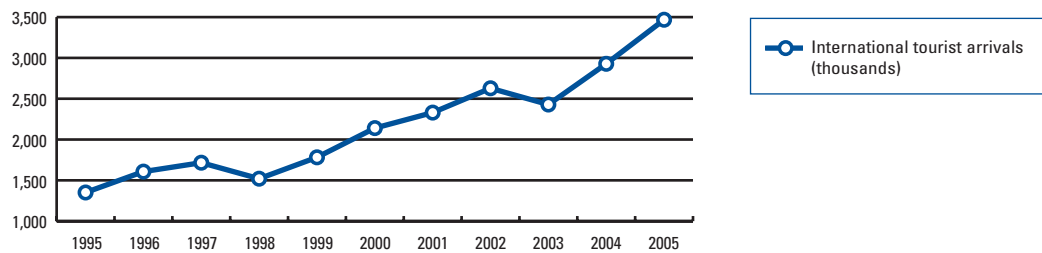
|                               |       | Percent<br>of total | 2007–2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-------|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 1,843 | 3.2                 | 6.2                                         |
| Employment (1,000 jobs) ..... | 953   | 2.5                 | 1.6                                         |

### T&T economy, 2006 estimates

|                               |       |      |     |
|-------------------------------|-------|------|-----|
| GDP (US\$ millions) .....     | 6,254 | 10.9 | 7.1 |
| Employment (1,000 jobs) ..... | 3,364 | 8.7  | 2.5 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                      |       |
|------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....   | 3,468 |
| International tourism receipts (US\$ millions) ..... | N/A   |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1–7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>87</b>            | <b>3.8</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>84</b>            | <b>3.9</b>           |
| Policy rules and regulations .....                           | 104                  | 3.7                  |
| Environmental regulation .....                               | 84                   | 3.6                  |
| Safety and security .....                                    | 51                   | 4.8                  |
| Health and hygiene .....                                     | 94                   | 4.0                  |
| Prioritization of T&T strategies .....                       | 76                   | 3.6                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>95</b>            | <b>2.8</b>           |
| Air transport infrastructure .....                           | 90                   | 2.5                  |
| Ground transport infrastructure .....                        | 85                   | 2.9                  |
| Tourism infrastructure .....                                 | 121                  | 1.1                  |
| ICT infrastructure .....                                     | 88                   | 2.1                  |
| Price competitiveness in T&T industry .....                  | 10                   | 5.5                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>76</b>            | <b>4.6</b>           |
| Human resources .....                                        | 81                   | 4.9                  |
| Education and training .....                                 | 82                   | 4.3                  |
| Availability of qualified labor .....                        | 52                   | 4.5                  |
| Workforce wellness .....                                     | 83                   | 5.9                  |
| National tourism perception .....                            | 51                   | 5.1                  |
| Natural and cultural resources .....                         | 84                   | 3.8                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."



## T&T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               |                                                           | Rank/124 | COMPETITIVE DISADVANTAGES                            |                                                           | Rank/124 |
|------------------------------------------------------|-----------------------------------------------------------|----------|------------------------------------------------------|-----------------------------------------------------------|----------|
| <b>Safety and security</b>                           |                                                           |          | <b>Policy rules and regulations</b>                  |                                                           |          |
| 3.02                                                 | Reliability of police services .....                      | 46       | 1.01                                                 | Foreign ownership restrictions.....                       | 121      |
| <b>Health and hygiene</b>                            |                                                           |          | 1.04                                                 | Visa requirements .....                                   | 94       |
| 4.01                                                 | Gov't efforts to reduce health risks from pandemics ..... | 15       | 1.05                                                 | Openness of bilateral Air Service Agreements .....        | 84       |
| <b>Prioritization of Travel &amp; Tourism</b>        |                                                           |          | 1.03                                                 | Rules governing foreign direct investment .....           | 73       |
| 5.04                                                 | T&T fair attendance .....                                 | 48       | 1.02                                                 | Property rights.....                                      | 69       |
| <b>Air transport infrastructure</b>                  |                                                           |          | <b>Environmental regulation</b>                      |                                                           |          |
| 6.02                                                 | Available seat kilometers.....                            | 41       | 2.01                                                 | Stringency of environmental regulation .....              | 108      |
| 6.05                                                 | Number of operating airlines.....                         | 45       | 2.02                                                 | Clarity and stability of environmental regulations .....  | 101      |
| <b>Price competitiveness in the T&amp;T industry</b> |                                                           |          | 2.03                                                 | Government prioritization of sustainable T&T .....        | 51       |
| 10.02                                                | Purchasing power parity .....                             | 10       | <b>Safety and security</b>                           |                                                           |          |
| 10.04                                                | Fuel price level .....                                    | 15       | 3.01                                                 | Business costs of terrorism .....                         | 61       |
| 10.01                                                | Ticket taxes and airport charges.....                     | 37       | 3.03                                                 | Business costs of crime and violence.....                 | 56       |
| <b>Human resources</b>                               |                                                           |          | <b>Health and hygiene</b>                            |                                                           |          |
| 11.06                                                | Hiring and firing practices.....                          | 45       | 4.03                                                 | Access to improved sanitation .....                       | 96       |
| <b>Natural and cultural resources</b>                |                                                           |          | 4.02                                                 | Physician density .....                                   | 92       |
| 13.01                                                | Number of World Heritage sites .....                      | 48       | 4.04                                                 | Access to improved drinking water .....                   | 83       |
|                                                      |                                                           |          | <b>Prioritization of Travel &amp; Tourism</b>        |                                                           |          |
|                                                      |                                                           |          | 5.02                                                 | T&T government expenditure .....                          | 99       |
|                                                      |                                                           |          | 5.01                                                 | Government prioritization of the T&T industry.....        | 61       |
|                                                      |                                                           |          | 5.03                                                 | Effectiveness of marketing and branding .....             | 56       |
|                                                      |                                                           |          | <b>Air transport infrastructure</b>                  |                                                           |          |
|                                                      |                                                           |          | 6.04                                                 | Airport density .....                                     | 123      |
|                                                      |                                                           |          | 6.03                                                 | Departures per 1,000 population.....                      | 92       |
|                                                      |                                                           |          | 6.01                                                 | Quality of air transport infrastructure .....             | 82       |
|                                                      |                                                           |          | 6.06                                                 | International air transport network .....                 | 76       |
|                                                      |                                                           |          | <b>Ground transport infrastructure</b>               |                                                           |          |
|                                                      |                                                           |          | 7.01                                                 | Road infrastructure .....                                 | 91       |
|                                                      |                                                           |          | 7.03                                                 | Port infrastructure .....                                 | 89       |
|                                                      |                                                           |          | 7.04                                                 | Domestic transport network .....                          | 77       |
|                                                      |                                                           |          | 7.02                                                 | Railroad infrastructure .....                             | 70       |
|                                                      |                                                           |          | <b>Tourism infrastructure</b>                        |                                                           |          |
|                                                      |                                                           |          | 8.02                                                 | Presence of major car rental companies.....               | 121      |
|                                                      |                                                           |          | 8.03                                                 | ATMs accepting Visa cards .....                           | 93       |
|                                                      |                                                           |          | 8.01                                                 | Hotel rooms.....                                          | 88       |
|                                                      |                                                           |          | <b>ICT infrastructure</b>                            |                                                           |          |
|                                                      |                                                           |          | 9.01                                                 | Extent of business Internet use .....                     | 111      |
|                                                      |                                                           |          | 9.02                                                 | Internet users .....                                      | 76       |
|                                                      |                                                           |          | 9.03                                                 | Telephone lines.....                                      | 74       |
|                                                      |                                                           |          | <b>Price competitiveness in the T&amp;T industry</b> |                                                           |          |
|                                                      |                                                           |          | 10.03                                                | Extent and effect of taxation .....                       | 54       |
|                                                      |                                                           |          | <b>Human resources</b>                               |                                                           |          |
|                                                      |                                                           |          | 11.03                                                | Quality of the educational system .....                   | 100      |
|                                                      |                                                           |          | 11.01                                                | Primary education enrollment .....                        | 94       |
|                                                      |                                                           |          | 11.10                                                | Tuberculosis incidence .....                              | 94       |
|                                                      |                                                           |          | 11.09                                                | Malaria incidence.....                                    | 83       |
|                                                      |                                                           |          | 11.02                                                | Secondary education enrollment.....                       | 81       |
|                                                      |                                                           |          | 11.04                                                | Local availability of research and training services..... | 76       |
|                                                      |                                                           |          | 11.05                                                | Extent of staff training.....                             | 71       |
|                                                      |                                                           |          | 11.08                                                | HIV prevalence .....                                      | 69       |
|                                                      |                                                           |          | 11.11                                                | Life expectancy .....                                     | 66       |
|                                                      |                                                           |          | 11.07                                                | Ease of hiring foreign labor .....                        | 63       |

(Disadvantages cont'd. from bottom of right column)

<<< (Cont'd. on bottom of left column)

# Zambia

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 11.7  |
| Surface area (1,000 square kilometers) .....              | 752.6 |
| Gross domestic product (US\$ billions), 2005 .....        | 7.3   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 931   |
| Real GDP growth (percent), 2005 .....                     | 5.1   |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

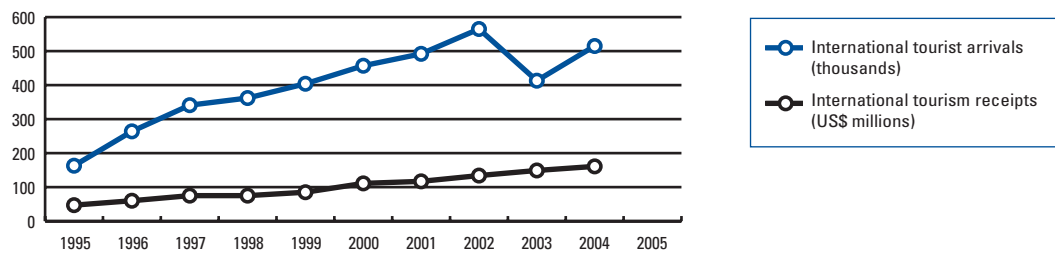
|                               |     | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|-----|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 103 | 1.3                 | 1.9                                         |
| Employment (1,000 jobs) ..... | 16  | 1.1                 | 0.5                                         |

### T&T economy, 2006 estimates

|                               |     |     |     |
|-------------------------------|-----|-----|-----|
| GDP (US\$ millions) .....     | 334 | 4.1 | 2.2 |
| Employment (1,000 jobs) ..... | 51  | 3.4 | 0.8 |

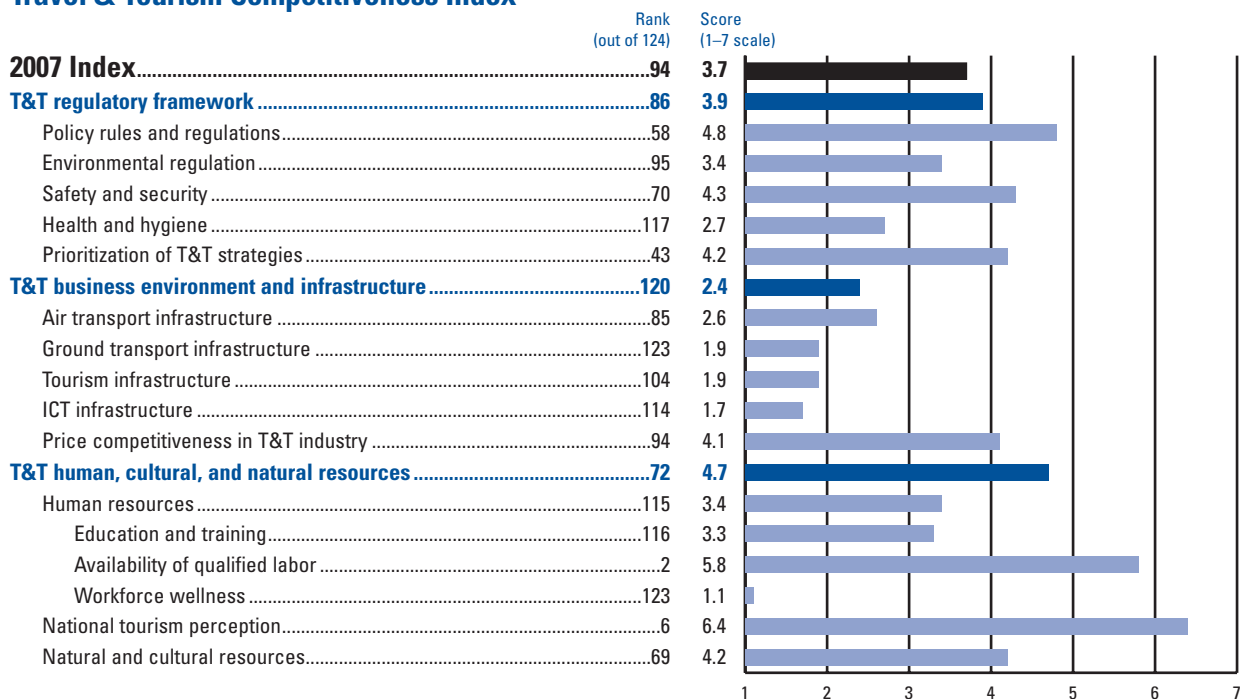
Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |     |
|------------------------------------------------------------|-----|
| International tourist arrivals (1,000), 2004 .....         | 515 |
| International tourism receipts (US\$ millions), 2004 ..... | 161 |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index



Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                                    | Rank/124 | COMPETITIVE DISADVANTAGES                                          | Rank/124 |
|-----------------------------------------------------------|----------|--------------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                       |          | <b>Policy rules and regulations</b>                                |          |
| 1.03 Rules governing foreign direct investment.....6      |          | 1.04 Visa requirements .....89                                     |          |
| 1.01 Foreign ownership restrictions.....16                |          | 1.05 Openness of bilateral Air Service Agreements .....62          |          |
|                                                           |          | 1.02 Property rights.....61                                        |          |
| <b>Environmental regulation</b>                           |          | <b>Environmental regulation</b>                                    |          |
| 2.03 Government prioritization of sustainable T&T .....17 |          | 2.02 Clarity and stability of environmental regulations .....122   |          |
|                                                           |          | 2.01 Stringency of environmental regulation .....119               |          |
| <b>Safety and security</b>                                |          | <b>Safety and security</b>                                         |          |
| 3.01 Business costs of terrorism .....8                   |          | 3.03 Business costs of crime and violence.....104                  |          |
|                                                           |          | 3.02 Reliability of police services .....67                        |          |
| <b>Prioritization of Travel &amp; Tourism</b>             |          | <b>Health and hygiene</b>                                          |          |
| 5.01 Government prioritization of the T&T industry.....11 |          | 4.01 Gov't efforts to reduce health risks from pandemics .....120  |          |
| 5.03 Effectiveness of marketing and branding .....23      |          | 4.02 Physician density .....109                                    |          |
| 5.04 T&T fair attendance.....48                           |          | 4.04 Access to improved drinking water .....106                    |          |
|                                                           |          | 4.03 Access to improved sanitation .....91                         |          |
| <b>Air transport infrastructure</b>                       |          | <b>Prioritization of Travel &amp; Tourism</b>                      |          |
| 6.04 Airport density .....48                              |          | 5.02 T&T government expenditure .....85                            |          |
| <b>Price competitiveness in the T&amp;T industry</b>      |          | <b>Air transport infrastructure</b>                                |          |
| 10.01 Ticket taxes and airport charges.....26             |          | 6.02 Available seat kilometers.....105                             |          |
|                                                           |          | 6.03 Departures per 1,000 population.....91                        |          |
| <b>Human resources</b>                                    |          | 6.05 Number of operating airlines.....91                           |          |
| 11.06 Hiring and firing practices.....1                   |          | 6.01 Quality of air transport infrastructure .....58               |          |
| 11.07 Ease of hiring foreign labor .....12                |          | 6.06 International air transport network .....56                   |          |
| <b>National tourism perception</b>                        |          | <b>Ground transport infrastructure</b>                             |          |
| 12.02 Attitude toward tourists .....3                     |          | 7.04 Domestic transport network .....124                           |          |
| 12.03 Recommendation to extend business trips .....25     |          | 7.03 Port infrastructure .....110                                  |          |
|                                                           |          | 7.01 Road infrastructure.....107                                   |          |
| <b>Natural and cultural resources</b>                     |          | 7.02 Railroad infrastructure .....93                               |          |
| 13.03 Nationally protected areas.....6                    |          | <b>Tourism infrastructure</b>                                      |          |
| 13.02 Carbon dioxide damage.....36                        |          | 8.01 Hotel rooms.....103                                           |          |
|                                                           |          | 8.03 ATMs accepting Visa cards .....99                             |          |
|                                                           |          | 8.02 Presence of major car rental companies.....92                 |          |
|                                                           |          | <b>ICT infrastructure</b>                                          |          |
|                                                           |          | 9.03 Telephone lines.....109                                       |          |
|                                                           |          | 9.01 Extent of business Internet use .....107                      |          |
|                                                           |          | 9.02 Internet users .....102                                       |          |
|                                                           |          | <b>Price competitiveness in the T&amp;T industry</b>               |          |
|                                                           |          | 10.03 Extent and effect of taxation.....121                        |          |
|                                                           |          | 10.04 Fuel price level .....94                                     |          |
|                                                           |          | 10.02 Purchasing power parity.....83                               |          |
|                                                           |          | <b>Human resources</b>                                             |          |
|                                                           |          | 11.04 Local availability of research and training services.....124 |          |
|                                                           |          | 11.05 Extent of staff training.....124                             |          |
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|                                                           |          | 11.11 Life expectancy .....121                                     |          |
|                                                           |          | 11.08 HIV prevalence .....119                                      |          |
|                                                           |          | 11.09 Malaria incidence.....119                                    |          |
|                                                           |          | 11.02 Secondary education enrollment.....113                       |          |
|                                                           |          | 11.01 Primary education enrollment .....90                         |          |
|                                                           |          | 11.03 Quality of the educational system .....59                    |          |
|                                                           |          | <b>Natural and cultural resources</b>                              |          |
|                                                           |          | 13.04 Business concern for ecosystems .....124                     |          |
|                                                           |          | 13.01 Number of World Heritage sites .....87                       |          |
|                                                           |          | 13.05 Risk of malaria and yellow fever .....83                     |          |

# Zimbabwe

## Key indicators

|                                                           |       |
|-----------------------------------------------------------|-------|
| Population (millions), 2005 .....                         | 13.0  |
| Surface area (1,000 square kilometers) .....              | 390.8 |
| Gross domestic product (US\$ billions), 2005 .....        | 4.5   |
| Gross domestic product (PPP, US\$) per capita, 2005 ..... | 2,607 |
| Real GDP growth (percent), 2005 .....                     | -6.5  |

Source: World Bank, *World Development Indicators Online Database* (December 2006); IMF, *World Economic Outlook Online Database* (April and September 2006 editions); national sources

## Travel & Tourism indicators

### T&T industry, 2006 estimates

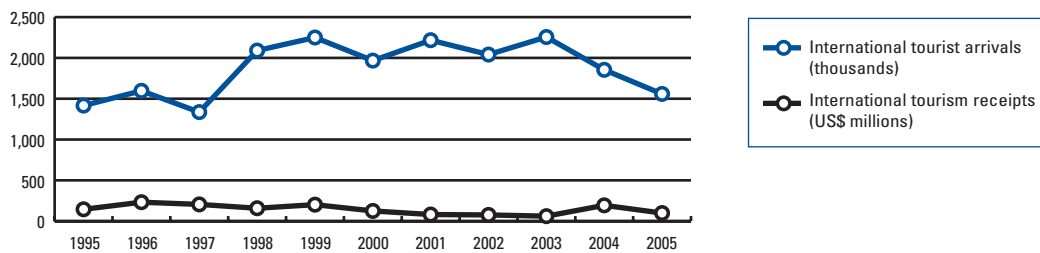
|                               |    | Percent<br>of total | 2007-2016<br>annual growth<br>(%, forecast) |
|-------------------------------|----|---------------------|---------------------------------------------|
| GDP (US\$ millions) .....     | 95 | 2.3                 | 3.0                                         |
| Employment (1,000 jobs) ..... | 21 | 2.1                 | 0.9                                         |

### T&T economy, 2006 estimates

|                               |     |     |      |
|-------------------------------|-----|-----|------|
| GDP (US\$ millions) .....     | 218 | 5.3 | 1.9  |
| Employment (1,000 jobs) ..... | 48  | 4.7 | -0.1 |

Source: World Travel & Tourism Council, *TSA Research 2006*

|                                                            |       |
|------------------------------------------------------------|-------|
| International tourist arrivals (1,000), 2005 .....         | 1,559 |
| International tourism receipts (US\$ millions), 2005 ..... | 99    |



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

|                                                              | Rank<br>(out of 124) | Score<br>(1-7 scale) |
|--------------------------------------------------------------|----------------------|----------------------|
| <b>2007 Index</b> .....                                      | <b>107</b>           | <b>3.5</b>           |
| <b>T&amp;T regulatory framework</b> .....                    | <b>108</b>           | <b>3.5</b>           |
| Policy rules and regulations .....                           | 114                  | 3.4                  |
| Environmental regulation .....                               | 90                   | 3.5                  |
| Safety and security .....                                    | 86                   | 4.1                  |
| Health and hygiene .....                                     | 102                  | 3.5                  |
| Prioritization of T&T strategies .....                       | 105                  | 3.0                  |
| <b>T&amp;T business environment and infrastructure</b> ..... | <b>84</b>            | <b>3.0</b>           |
| Air transport infrastructure .....                           | 70                   | 2.8                  |
| Ground transport infrastructure .....                        | 81                   | 2.9                  |
| Tourism infrastructure .....                                 | 91                   | 2.2                  |
| ICT infrastructure .....                                     | 95                   | 1.9                  |
| Price competitiveness in T&T industry .....                  | 32                   | 5.0                  |
| <b>T&amp;T human, cultural, and natural resources</b> .....  | <b>114</b>           | <b>4.0</b>           |
| Human resources .....                                        | 123                  | 2.6                  |
| Education and training .....                                 | 97                   | 4.0                  |
| Availability of qualified labor .....                        | 124                  | 2.7                  |
| Workforce wellness .....                                     | 124                  | 1.1                  |
| National tourism perception .....                            | 29                   | 5.6                  |
| Natural and cultural resources .....                         | 87                   | 3.8                  |

Note: For descriptions of variables and detailed sources, please refer to "How to Read the Country/Economy Profiles."

## T&amp;T national competitiveness balance sheet

| COMPETITIVE ADVANTAGES                               | Rank/124 | COMPETITIVE DISADVANTAGES                                           | Rank/124 |
|------------------------------------------------------|----------|---------------------------------------------------------------------|----------|
| <b>Policy rules and regulations</b>                  |          | <b>Policy rules and regulations</b>                                 |          |
| 1.04 Visa requirements .....43                       |          | 1.02 Property rights .....124                                       |          |
|                                                      |          | 1.03 Rules governing foreign direct investment .....124             |          |
| <b>Safety and security</b>                           |          | 1.01 Foreign ownership restrictions .....114                        |          |
| 3.01 Business costs of terrorism .....5              |          | 1.05 Openness of bilateral Air Service Agreements .....91           |          |
|                                                      |          |                                                                     |          |
| <b>Air transport infrastructure</b>                  |          | <b>Environmental regulation</b>                                     |          |
| 6.04 Airport density .....14                         |          | 2.03 Government prioritization of sustainable T&T .....103          |          |
| 6.03 Departures per 1,000 population .....25         |          | 2.01 Stringency of environmental regulation .....79                 |          |
|                                                      |          | 2.02 Clarity and stability of environmental regulations .....66     |          |
| <b>Price competitiveness in the T&amp;T industry</b> |          |                                                                     |          |
| 10.02 Purchasing power parity .....2                 |          | <b>Safety and security</b>                                          |          |
|                                                      |          | 3.02 Reliability of police services .....112                        |          |
| <b>Human resources</b>                               |          | 3.03 Business costs of crime and violence .....92                   |          |
| 11.03 Quality of the educational system .....39      |          |                                                                     |          |
| 11.05 Extent of staff training .....50               |          | <b>Health and hygiene</b>                                           |          |
|                                                      |          | 4.01 Gov't efforts to reduce health risks from pandemics .....118   |          |
| <b>Natural and cultural resources</b>                |          | 4.02 Physician density .....105                                     |          |
| 13.03 Nationally protected areas .....36             |          | 4.03 Access to improved sanitation .....78                          |          |
| 13.04 Business concern for ecosystems .....43        |          | 4.04 Access to improved drinking water .....74                      |          |
| 13.01 Number of World Heritage sites .....48         |          |                                                                     |          |
|                                                      |          | <b>Prioritization of Travel &amp; Tourism</b>                       |          |
|                                                      |          | 5.03 Effectiveness of marketing and branding .....102               |          |
|                                                      |          | 5.01 Government prioritization of the T&T industry .....91          |          |
|                                                      |          | 5.02 T&T government expenditure .....78                             |          |
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|                                                      |          | 6.02 Available seat kilometers .....95                              |          |
|                                                      |          | 6.05 Number of operating airlines .....94                           |          |
|                                                      |          |                                                                     |          |
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|                                                      |          | 7.04 Domestic transport network .....118                            |          |
|                                                      |          | 7.03 Port infrastructure .....81                                    |          |
|                                                      |          | 7.01 Road infrastructure .....70                                    |          |
|                                                      |          | 7.02 Railroad infrastructure .....57                                |          |
|                                                      |          |                                                                     |          |
|                                                      |          | <b>Tourism infrastructure</b>                                       |          |
|                                                      |          | 8.01 Hotel rooms .....104                                           |          |
|                                                      |          | 8.03 ATMs accepting Visa cards .....92                              |          |
|                                                      |          | 8.02 Presence of major car rental companies .....66                 |          |
|                                                      |          |                                                                     |          |
|                                                      |          | <b>ICT infrastructure</b>                                           |          |
|                                                      |          | 9.03 Telephone lines .....103                                       |          |
|                                                      |          | 9.01 Extent of business Internet use .....102                       |          |
|                                                      |          | 9.02 Internet users .....77                                         |          |
|                                                      |          |                                                                     |          |
|                                                      |          | <b>Price competitiveness in the T&amp;T industry</b>                |          |
|                                                      |          | 10.03 Extent and effect of taxation .....103                        |          |
|                                                      |          | 10.04 Fuel price level .....58                                      |          |
|                                                      |          | 10.01 Ticket taxes and airport charges .....57                      |          |
|                                                      |          |                                                                     |          |
|                                                      |          | <b>Human resources</b>                                              |          |
|                                                      |          | 11.11 Life expectancy .....124                                      |          |
|                                                      |          | 11.07 Ease of hiring foreign labor .....123                         |          |
|                                                      |          | 11.08 HIV prevalence .....122                                       |          |
|                                                      |          | 11.10 Tuberculosis incidence .....121                               |          |
|                                                      |          | 11.06 Hiring and firing practices .....115                          |          |
|                                                      |          | 11.09 Malaria incidence .....113                                    |          |
|                                                      |          | 11.04 Local availability of research and training services .....108 |          |
|                                                      |          | 11.02 Secondary education enrollment .....106                       |          |
|                                                      |          | 11.01 Primary education enrollment .....102                         |          |

(Disadvantages cont'd. from bottom of right column)

| COMPETITIVE DISADVANTAGES                             | Rank/124 |
|-------------------------------------------------------|----------|
| <b>National tourism perception</b>                    |          |
| 12.02 Attitude toward tourists .....110               |          |
| 12.03 Recommendation to extend business trips .....75 |          |
|                                                       |          |
| <b>Natural and cultural resources</b>                 |          |
| 13.02 Carbon dioxide damage .....110                  |          |
| 13.05 Risk of malaria and yellow fever .....103       |          |

&lt;&lt;&lt; (Cont'd. on bottom of left column)



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# 2.2

## Data Tables





# How to Read the Data Tables

The following pages present the data for all the variables included in the Travel & Tourism Competitiveness Index 2007 (TTCI) for all 124 economies covered by the study.

The tables are organized in 13 sections, which correspond to the 13 pillars of the TTCI. The number preceding the title of each variable serves to identify the pillar to which the variable belongs.

Two types of data are used in the TTCI: Survey data and hard data.

- **Survey data:** average responses in each economy to questions included in the World Economic Forum's Executive Opinion Survey, conducted in the early months of 2006.
- **Hard data:** indicators obtained from a variety of sources.

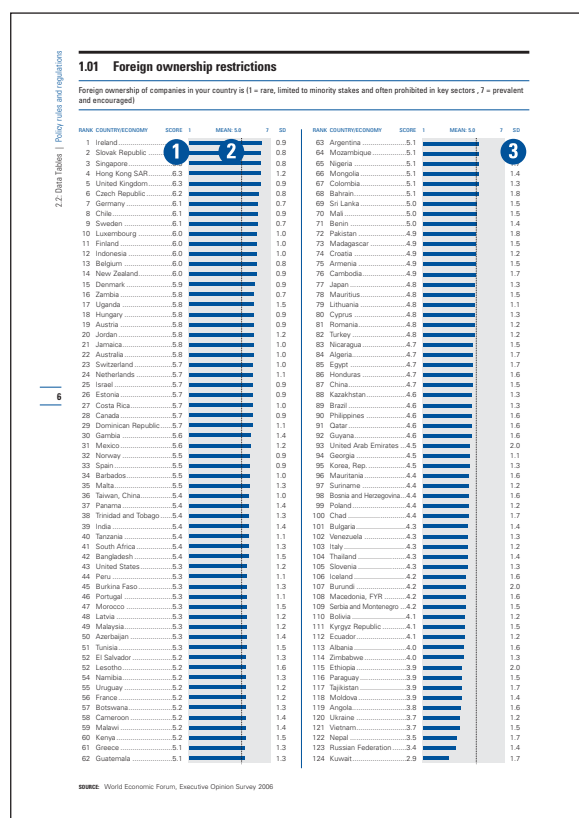
## Survey data

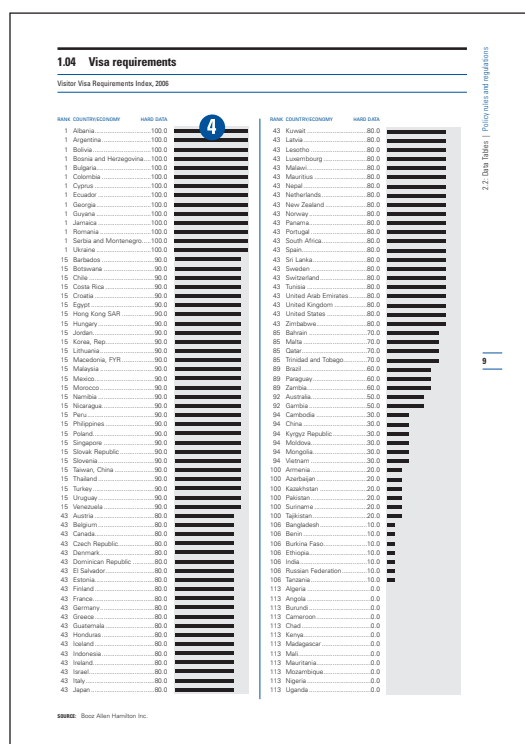
① Data yielded from the World Economic Forum's Executive Opinion Survey are presented in blue-colored bar graphs. Questions from the Survey asked for responses on a scale of 1 to 7, where an answer of 1 corresponds to the lowest possible score and an answer of 7 corresponds to the highest possible score. For each Survey variable, the original question and the two extreme answers are shown.

We report the average score for each economy—that is, the arithmetic mean of responses from each economy. Variable 5.01, for example, asks about the government's prioritization of the T&T industry in the respondent's economy. On this particular variable, Mauritius with a score of 6.5 ranks first, and therefore appears at the top, followed by Barbados, second with a score of 6.3. We report responses rounded to one decimal point, but use the exact figures to determine rankings. For example, in the case of variable 1.01 on foreign ownership restrictions, Belgium's average score is 5.986 and New Zealand's average score is 5.978. These economies are therefore ranked 13th and 14th respectively, although they are both listed with the same rounded score of 6.0.

② A dotted line on the graph indicates the mean score across the sample of 124 economies.

③ Standard deviations are shown next to the bars representing each economy's mean score. The standard deviation indicates how closely or widely the individual responses are spread around the mean economy score. In other words, this provides information on the extent of agreement or disagreement on the question within the given economy. The smaller the standard deviation, the greater the consensus is among the respondents from a particular economy. In the case of variable 3.03 on the impact on business of crime and violence, the standard deviation of the sample of respondents from Iceland is 0.4, reflecting a high degree of consensus.





## Hard data

**4** While Survey data provide qualitative information, hard data provide objective quantitative measures (for example, surface of protected areas, number of airports, life expectancy, and so on). Several hard data indicators were computed or provided by partners to the project (Booz Allen Hamilton, the United Nations World Tourism Organization, the World Travel & Tourism Council, and the International Air Transport Association). Other hard data indicators entering the TTCI were obtained from international organizations (for example, the International Monetary Fund, the World Bank, the International Telecommunication Union, United Nations' agencies, the World Trade Organization, and so on), and, in some cases, from national sources. In the following pages, hard data variables are presented in black bar graphs. A detailed description and full source for each variable can be found in the Technical Notes and Sources section at the end of this *Report*.

When data are not available or are out of date, “n/a” is used in lieu of the rank and the value.

In the case of hard data, true ties between two or more countries are possible. In such cases, shared rankings are indicated accordingly. For example, in both Singapore and Switzerland T&T government expenditure represents 7.5 percent of the total budget. Therefore, these two countries share the 15th rank on variable 5.02.

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|----------------------------------------|------------|
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| 7.01 Road infrastructure               | 410        |
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|                                             |            |
|---------------------------------------------|------------|
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| 8.02 Presence of major car rental companies | 417        |
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|--------------------------------------|------------|
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## Pillar 1

# Policy rules and regulations

## 1.01 Foreign ownership restrictions

Foreign ownership of companies in your country is (1 = rare, limited to minority stakes and often prohibited in key sectors, 7 = prevalent and encouraged)

| RANK | COUNTRY/ECONOMY     | SCORE | 1 | MEAN: 5.0 | 7 | SD  | RANK | COUNTRY/ECONOMY        | SCORE | 1 | MEAN: 5.0 | 7 | SD  |
|------|---------------------|-------|---|-----------|---|-----|------|------------------------|-------|---|-----------|---|-----|
| 1    | Ireland             | 6.4   |   |           |   | 0.9 | 63   | Argentina              | 5.1   |   |           |   | 1.0 |
| 2    | Slovak Republic     | 6.3   |   |           |   | 0.8 | 64   | Mozambique             | 5.1   |   |           |   | 1.1 |
| 3    | Singapore           | 6.3   |   |           |   | 0.8 | 65   | Nigeria                | 5.1   |   |           |   | 1.7 |
| 4    | Hong Kong SAR       | 6.3   |   |           |   | 1.2 | 66   | Mongolia               | 5.1   |   |           |   | 1.4 |
| 5    | United Kingdom      | 6.3   |   |           |   | 0.9 | 67   | Colombia               | 5.1   |   |           |   | 1.3 |
| 6    | Czech Republic      | 6.2   |   |           |   | 0.8 | 68   | Bahrain                | 5.1   |   |           |   | 1.8 |
| 7    | Germany             | 6.1   |   |           |   | 0.7 | 69   | Sri Lanka              | 5.0   |   |           |   | 1.5 |
| 8    | Chile               | 6.1   |   |           |   | 0.9 | 70   | Mali                   | 5.0   |   |           |   | 1.5 |
| 9    | Sweden              | 6.1   |   |           |   | 0.7 | 71   | Benin                  | 5.0   |   |           |   | 1.4 |
| 10   | Luxembourg          | 6.0   |   |           |   | 1.0 | 72   | Pakistan               | 4.9   |   |           |   | 1.8 |
| 11   | Finland             | 6.0   |   |           |   | 1.0 | 73   | Madagascar             | 4.9   |   |           |   | 1.5 |
| 12   | Indonesia           | 6.0   |   |           |   | 1.0 | 74   | Croatia                | 4.9   |   |           |   | 1.2 |
| 13   | Belgium             | 6.0   |   |           |   | 0.8 | 75   | Armenia                | 4.9   |   |           |   | 1.5 |
| 14   | New Zealand         | 6.0   |   |           |   | 0.9 | 76   | Cambodia               | 4.9   |   |           |   | 1.7 |
| 15   | Denmark             | 5.9   |   |           |   | 0.9 | 77   | Japan                  | 4.8   |   |           |   | 1.3 |
| 16   | Zambia              | 5.8   |   |           |   | 0.7 | 78   | Mauritius              | 4.8   |   |           |   | 1.5 |
| 17   | Uganda              | 5.8   |   |           |   | 1.5 | 79   | Lithuania              | 4.8   |   |           |   | 1.1 |
| 18   | Hungary             | 5.8   |   |           |   | 0.9 | 80   | Cyprus                 | 4.8   |   |           |   | 1.3 |
| 19   | Austria             | 5.8   |   |           |   | 0.9 | 81   | Romania                | 4.8   |   |           |   | 1.2 |
| 20   | Jordan              | 5.8   |   |           |   | 1.2 | 82   | Turkey                 | 4.8   |   |           |   | 1.2 |
| 21   | Jamaica             | 5.8   |   |           |   | 1.0 | 83   | Nicaragua              | 4.7   |   |           |   | 1.5 |
| 22   | Australia           | 5.8   |   |           |   | 1.0 | 84   | Algeria                | 4.7   |   |           |   | 1.7 |
| 23   | Switzerland         | 5.7   |   |           |   | 1.0 | 85   | Egypt                  | 4.7   |   |           |   | 1.7 |
| 24   | Netherlands         | 5.7   |   |           |   | 1.1 | 86   | Honduras               | 4.7   |   |           |   | 1.6 |
| 25   | Israel              | 5.7   |   |           |   | 0.9 | 87   | China                  | 4.7   |   |           |   | 1.5 |
| 26   | Estonia             | 5.7   |   |           |   | 0.9 | 88   | Kazakhstan             | 4.6   |   |           |   | 1.3 |
| 27   | Costa Rica          | 5.7   |   |           |   | 1.0 | 89   | Brazil                 | 4.6   |   |           |   | 1.3 |
| 28   | Canada              | 5.7   |   |           |   | 0.9 | 90   | Philippines            | 4.6   |   |           |   | 1.6 |
| 29   | Dominican Republic  | 5.7   |   |           |   | 1.1 | 91   | Qatar                  | 4.6   |   |           |   | 1.6 |
| 30   | Gambia              | 5.6   |   |           |   | 1.4 | 92   | Guyana                 | 4.6   |   |           |   | 1.6 |
| 31   | Mexico              | 5.6   |   |           |   | 1.2 | 93   | United Arab Emirates   | 4.5   |   |           |   | 2.0 |
| 32   | Norway              | 5.5   |   |           |   | 0.9 | 94   | Georgia                | 4.5   |   |           |   | 1.1 |
| 33   | Spain               | 5.5   |   |           |   | 0.9 | 95   | Korea, Rep.            | 4.5   |   |           |   | 1.3 |
| 34   | Barbados            | 5.5   |   |           |   | 1.0 | 96   | Mauritania             | 4.4   |   |           |   | 1.6 |
| 35   | Malta               | 5.5   |   |           |   | 1.3 | 97   | Suriname               | 4.4   |   |           |   | 1.2 |
| 36   | Taiwan, China       | 5.4   |   |           |   | 1.0 | 98   | Bosnia and Herzegovina | 4.4   |   |           |   | 1.6 |
| 37   | Panama              | 5.4   |   |           |   | 1.4 | 99   | Poland                 | 4.4   |   |           |   | 1.2 |
| 38   | Trinidad and Tobago | 5.4   |   |           |   | 1.3 | 100  | Chad                   | 4.4   |   |           |   | 1.7 |
| 39   | India               | 5.4   |   |           |   | 1.4 | 101  | Bulgaria               | 4.3   |   |           |   | 1.4 |
| 40   | Tanzania            | 5.4   |   |           |   | 1.1 | 102  | Venezuela              | 4.3   |   |           |   | 1.3 |
| 41   | South Africa        | 5.4   |   |           |   | 1.3 | 103  | Italy                  | 4.3   |   |           |   | 1.2 |
| 42   | Bangladesh          | 5.4   |   |           |   | 1.5 | 104  | Thailand               | 4.3   |   |           |   | 1.4 |
| 43   | United States       | 5.3   |   |           |   | 1.2 | 105  | Slovenia               | 4.3   |   |           |   | 1.3 |
| 44   | Peru                | 5.3   |   |           |   | 1.1 | 106  | Iceland                | 4.2   |   |           |   | 1.6 |
| 45   | Burkina Faso        | 5.3   |   |           |   | 1.3 | 107  | Burundi                | 4.2   |   |           |   | 2.0 |
| 46   | Portugal            | 5.3   |   |           |   | 1.1 | 108  | Macedonia, FYR         | 4.2   |   |           |   | 1.6 |
| 47   | Morocco             | 5.3   |   |           |   | 1.5 | 109  | Serbia and Montenegro  | 4.2   |   |           |   | 1.5 |
| 48   | Latvia              | 5.3   |   |           |   | 1.2 | 110  | Bolivia                | 4.1   |   |           |   | 1.2 |
| 49   | Malaysia            | 5.3   |   |           |   | 1.2 | 111  | Kyrgyz Republic        | 4.1   |   |           |   | 1.5 |
| 50   | Azerbaijan          | 5.3   |   |           |   | 1.4 | 112  | Ecuador                | 4.1   |   |           |   | 1.2 |
| 51   | Tunisia             | 5.3   |   |           |   | 1.5 | 113  | Albania                | 4.0   |   |           |   | 1.6 |
| 52   | El Salvador         | 5.2   |   |           |   | 1.3 | 114  | Zimbabwe               | 4.0   |   |           |   | 1.3 |
| 52   | Lesotho             | 5.2   |   |           |   | 1.6 | 115  | Ethiopia               | 3.9   |   |           |   | 2.0 |
| 54   | Namibia             | 5.2   |   |           |   | 1.3 | 116  | Paraguay               | 3.9   |   |           |   | 1.5 |
| 55   | Uruguay             | 5.2   |   |           |   | 1.2 | 117  | Tajikistan             | 3.9   |   |           |   | 1.7 |
| 56   | France              | 5.2   |   |           |   | 1.2 | 118  | Moldova                | 3.9   |   |           |   | 1.4 |
| 57   | Botswana            | 5.2   |   |           |   | 1.3 | 119  | Angola                 | 3.8   |   |           |   | 1.6 |
| 58   | Cameroon            | 5.2   |   |           |   | 1.4 | 120  | Ukraine                | 3.7   |   |           |   | 1.2 |
| 59   | Malawi              | 5.2   |   |           |   | 1.4 | 121  | Vietnam                | 3.7   |   |           |   | 1.5 |
| 60   | Kenya               | 5.2   |   |           |   | 1.5 | 122  | Nepal                  | 3.5   |   |           |   | 1.7 |
| 61   | Greece              | 5.1   |   |           |   | 1.3 | 123  | Russian Federation     | 3.4   |   |           |   | 1.4 |
| 62   | Guatemala           | 5.1   |   |           |   | 1.3 | 124  | Kuwait                 | 2.9   |   |           |   | 1.7 |

SOURCE: World Economic Forum, Executive Opinion Survey 2006

## 1.02 Property rights

Property rights, including over financial assets (1 = are poorly defined and not protected by law, 7 = are clearly defined and well protected by law)

| RANK | COUNTRY/ECONOMY      | SCORE | 1 | MEAN: 4.6 | 7 | SD  | RANK | COUNTRY/ECONOMY        | SCORE | 1 | MEAN: 4.6 | 7 | SD  |
|------|----------------------|-------|---|-----------|---|-----|------|------------------------|-------|---|-----------|---|-----|
| 1    | Germany              | 6.8   |   |           |   | 0.5 | 63   | Sri Lanka              | 4.6   |   |           |   | 1.6 |
| 2    | Iceland              | 6.7   |   |           |   | 0.5 | 64   | Czech Republic         | 4.6   |   |           |   | 1.4 |
| 3    | Denmark              | 6.6   |   |           |   | 0.6 | 65   | Trinidad and Tobago    | 4.6   |   |           |   | 1.6 |
| 4    | Switzerland          | 6.6   |   |           |   | 0.7 | 66   | Algeria                | 4.5   |   |           |   | 2.0 |
| 5    | Netherlands          | 6.5   |   |           |   | 0.7 | 67   | El Salvador            | 4.5   |   |           |   | 1.7 |
| 6    | United Kingdom       | 6.5   |   |           |   | 0.9 | 68   | Burkina Faso           | 4.4   |   |           |   | 1.4 |
| 7    | Austria              | 6.4   |   |           |   | 0.9 | 69   | Vietnam                | 4.4   |   |           |   | 1.5 |
| 8    | Finland              | 6.4   |   |           |   | 0.9 | 70   | Philippines            | 4.4   |   |           |   | 1.5 |
| 9    | Ireland              | 6.4   |   |           |   | 0.8 | 71   | Armenia                | 4.3   |   |           |   | 1.7 |
| 10   | Australia            | 6.4   |   |           |   | 0.8 | 72   | Tajikistan             | 4.2   |   |           |   | 1.8 |
| 11   | Singapore            | 6.3   |   |           |   | 0.8 | 73   | Guatemala              | 4.2   |   |           |   | 1.2 |
| 12   | Luxembourg           | 6.3   |   |           |   | 1.0 | 74   | Malawi                 | 4.2   |   |           |   | 1.6 |
| 13   | Norway               | 6.3   |   |           |   | 0.7 | 75   | Dominican Republic     | 4.2   |   |           |   | 1.3 |
| 14   | Hong Kong SAR        | 6.2   |   |           |   | 1.1 | 76   | Romania                | 4.1   |   |           |   | 1.5 |
| 15   | Japan                | 6.2   |   |           |   | 1.0 | 77   | Mali                   | 4.1   |   |           |   | 1.7 |
| 16   | Sweden               | 6.2   |   |           |   | 1.1 | 78   | Nepal                  | 4.1   |   |           |   | 1.8 |
| 17   | New Zealand          | 6.2   |   |           |   | 1.1 | 79   | Gambia                 | 4.0   |   |           |   | 1.8 |
| 18   | France               | 6.1   |   |           |   | 1.1 | 80   | Mongolia               | 4.0   |   |           |   | 1.6 |
| 19   | Belgium              | 5.9   |   |           |   | 1.3 | 81   | Croatia                | 4.0   |   |           |   | 1.5 |
| 20   | Canada               | 5.9   |   |           |   | 1.4 | 82   | China                  | 4.0   |   |           |   | 1.5 |
| 21   | United States        | 5.8   |   |           |   | 1.3 | 83   | Kenya                  | 3.9   |   |           |   | 1.6 |
| 22   | South Africa         | 5.8   |   |           |   | 1.0 | 84   | Tanzania               | 3.9   |   |           |   | 1.5 |
| 23   | Israel               | 5.8   |   |           |   | 1.0 | 85   | Kazakhstan             | 3.9   |   |           |   | 1.5 |
| 24   | Malaysia             | 5.8   |   |           |   | 0.9 | 86   | Mozambique             | 3.9   |   |           |   | 1.6 |
| 25   | India                | 5.7   |   |           |   | 1.3 | 87   | Bangladesh             | 3.8   |   |           |   | 1.7 |
| 26   | Spain                | 5.6   |   |           |   | 1.3 | 88   | Nigeria                | 3.8   |   |           |   | 1.8 |
| 27   | Estonia              | 5.6   |   |           |   | 1.2 | 89   | Serbia and Montenegro  | 3.8   |   |           |   | 1.7 |
| 28   | Mauritius            | 5.6   |   |           |   | 1.3 | 90   | Indonesia              | 3.8   |   |           |   | 0.9 |
| 29   | Cyprus               | 5.5   |   |           |   | 1.4 | 91   | Bulgaria               | 3.8   |   |           |   | 1.5 |
| 30   | Chile                | 5.5   |   |           |   | 1.3 | 92   | Poland                 | 3.7   |   |           |   | 1.0 |
| 31   | Namibia              | 5.5   |   |           |   | 1.3 | 93   | Mauritania             | 3.7   |   |           |   | 1.5 |
| 32   | Hungary              | 5.5   |   |           |   | 1.2 | 94   | Suriname               | 3.7   |   |           |   | 1.8 |
| 33   | Portugal             | 5.5   |   |           |   | 1.4 | 95   | Pakistan               | 3.7   |   |           |   | 1.4 |
| 34   | Korea, Rep.          | 5.4   |   |           |   | 1.3 | 96   | Cambodia               | 3.6   |   |           |   | 1.8 |
| 35   | Tunisia              | 5.4   |   |           |   | 1.3 | 97   | Benin                  | 3.6   |   |           |   | 1.6 |
| 36   | Barbados             | 5.4   |   |           |   | 1.1 | 98   | Azerbaijan             | 3.6   |   |           |   | 1.5 |
| 37   | Greece               | 5.3   |   |           |   | 1.3 | 99   | Ethiopia               | 3.6   |   |           |   | 1.6 |
| 38   | Qatar                | 5.3   |   |           |   | 1.5 | 100  | Madagascar             | 3.6   |   |           |   | 1.4 |
| 39   | Taiwan, China        | 5.3   |   |           |   | 1.2 | 101  | Uganda                 | 3.6   |   |           |   | 1.8 |
| 40   | Thailand             | 5.3   |   |           |   | 1.0 | 102  | Georgia                | 3.5   |   |           |   | 1.4 |
| 41   | Malta                | 5.2   |   |           |   | 1.5 | 103  | Moldova                | 3.5   |   |           |   | 1.5 |
| 42   | United Arab Emirates | 5.1   |   |           |   | 1.7 | 104  | Honduras               | 3.5   |   |           |   | 1.3 |
| 43   | Italy                | 5.1   |   |           |   | 1.5 | 105  | Cameroon               | 3.5   |   |           |   | 1.9 |
| 44   | Panama               | 5.0   |   |           |   | 1.4 | 106  | Peru                   | 3.5   |   |           |   | 1.3 |
| 45   | Slovak Republic      | 5.0   |   |           |   | 1.2 | 107  | Macedonia, FYR         | 3.5   |   |           |   | 1.7 |
| 46   | Jordan               | 5.0   |   |           |   | 1.5 | 108  | Angola                 | 3.5   |   |           |   | 1.5 |
| 47   | Bahrain              | 5.0   |   |           |   | 1.7 | 109  | Nicaragua              | 3.4   |   |           |   | 1.6 |
| 48   | Jamaica              | 5.0   |   |           |   | 1.4 | 110  | Ecuador                | 3.4   |   |           |   | 1.3 |
| 49   | Lithuania            | 4.9   |   |           |   | 1.4 | 111  | Lesotho                | 3.4   |   |           |   | 1.8 |
| 50   | Slovenia             | 4.9   |   |           |   | 1.6 | 112  | Guyana                 | 3.4   |   |           |   | 1.7 |
| 51   | Latvia               | 4.9   |   |           |   | 1.7 | 113  | Ukraine                | 3.4   |   |           |   | 1.4 |
| 52   | Botswana             | 4.9   |   |           |   | 1.4 | 114  | Russian Federation     | 3.2   |   |           |   | 1.5 |
| 53   | Turkey               | 4.8   |   |           |   | 1.5 | 115  | Bolivia                | 3.1   |   |           |   | 1.5 |
| 54   | Kuwait               | 4.8   |   |           |   | 1.8 | 116  | Albania                | 3.0   |   |           |   | 1.4 |
| 55   | Uruguay              | 4.8   |   |           |   | 1.4 | 117  | Paraguay               | 3.0   |   |           |   | 1.3 |
| 56   | Morocco              | 4.8   |   |           |   | 1.9 | 118  | Kyrgyz Republic        | 3.0   |   |           |   | 1.4 |
| 57   | Egypt                | 4.7   |   |           |   | 1.8 | 119  | Burundi                | 3.0   |   |           |   | 1.8 |
| 58   | Colombia             | 4.7   |   |           |   | 1.5 | 120  | Bosnia and Herzegovina | 3.0   |   |           |   | 1.2 |
| 59   | Costa Rica           | 4.7   |   |           |   | 1.4 | 121  | Argentina              | 2.9   |   |           |   | 1.4 |
| 60   | Mexico               | 4.6   |   |           |   | 1.5 | 122  | Chad                   | 2.6   |   |           |   | 1.7 |
| 61   | Zambia               | 4.6   |   |           |   | 1.5 | 123  | Venezuela              | 2.4   |   |           |   | 1.3 |
| 62   | Brazil               | 4.6   |   |           |   | 1.5 | 124  | Zimbabwe               | 1.9   |   |           |   | 1.3 |

SOURCE: World Economic Forum, Executive Opinion Survey 2006

## 1.03 Rules governing foreign direct investment

In your country, rules governing foreign direct investment are (1 = damaging and discourage foreign direct investment, 7 = beneficial and encourage foreign direct investment)

| RANK | COUNTRY/ECONOMY      | SCORE | 1 | MEAN: 5.0 | 7 | SD  | RANK | COUNTRY/ECONOMY        | SCORE | 1 | MEAN: 5.0 | 7 | SD  |
|------|----------------------|-------|---|-----------|---|-----|------|------------------------|-------|---|-----------|---|-----|
| 1    | Singapore            | 6.5   |   |           |   | 0.7 | 63   | Angola                 | 5.1   |   |           |   | 1.6 |
| 2    | Ireland              | 6.5   |   |           |   | 0.9 | 64   | Mali                   | 5.1   |   |           |   | 1.6 |
| 3    | Hong Kong SAR        | 6.5   |   |           |   | 0.8 | 65   | Colombia               | 5.1   |   |           |   | 1.1 |
| 4    | Luxembourg           | 6.3   |   |           |   | 0.8 | 66   | Pakistan               | 5.1   |   |           |   | 1.5 |
| 5    | Slovak Republic      | 6.2   |   |           |   | 0.8 | 67   | Turkey                 | 5.1   |   |           |   | 1.1 |
| 6    | Zambia               | 6.1   |   |           |   | 1.1 | 68   | Botswana               | 5.1   |   |           |   | 1.4 |
| 7    | United Kingdom       | 6.0   |   |           |   | 1.0 | 69   | Mauritius              | 5.1   |   |           |   | 1.0 |
| 8    | Indonesia            | 6.0   |   |           |   | 1.1 | 70   | Guatemala              | 5.1   |   |           |   | 1.3 |
| 9    | Estonia              | 6.0   |   |           |   | 0.9 | 71   | Mongolia               | 5.0   |   |           |   | 1.5 |
| 10   | Czech Republic       | 5.9   |   |           |   | 1.0 | 72   | South Africa           | 5.0   |   |           |   | 1.1 |
| 11   | Chile                | 5.9   |   |           |   | 0.9 | 73   | Vietnam                | 5.0   |   |           |   | 1.6 |
| 12   | Malaysia             | 5.9   |   |           |   | 0.9 | 74   | Mozambique             | 5.0   |   |           |   | 1.6 |
| 13   | Portugal             | 5.9   |   |           |   | 0.8 | 75   | Latvia                 | 4.9   |   |           |   | 1.2 |
| 14   | Finland              | 5.9   |   |           |   | 0.9 | 76   | Nicaragua              | 4.9   |   |           |   | 1.3 |
| 15   | Sweden               | 5.8   |   |           |   | 1.0 | 77   | Uruguay                | 4.9   |   |           |   | 1.5 |
| 16   | Switzerland          | 5.8   |   |           |   | 1.0 | 78   | Philippines            | 4.9   |   |           |   | 1.3 |
| 17   | Netherlands          | 5.8   |   |           |   | 1.0 | 79   | Lesotho                | 4.8   |   |           |   | 1.6 |
| 18   | Denmark              | 5.8   |   |           |   | 0.8 | 80   | Honduras               | 4.8   |   |           |   | 1.4 |
| 19   | Germany              | 5.7   |   |           |   | 1.0 | 81   | Brazil                 | 4.8   |   |           |   | 1.3 |
| 20   | Belgium              | 5.7   |   |           |   | 1.1 | 82   | Japan                  | 4.7   |   |           |   | 1.2 |
| 21   | Austria              | 5.7   |   |           |   | 0.9 | 83   | Namibia                | 4.7   |   |           |   | 1.3 |
| 22   | Uganda               | 5.7   |   |           |   | 1.4 | 84   | Azerbaijan             | 4.7   |   |           |   | 1.7 |
| 23   | Bangladesh           | 5.7   |   |           |   | 1.4 | 85   | Kazakhstan             | 4.7   |   |           |   | 1.2 |
| 24   | Gambia               | 5.7   |   |           |   | 1.2 | 86   | Malawi                 | 4.7   |   |           |   | 1.4 |
| 25   | Tunisia              | 5.7   |   |           |   | 1.1 | 87   | Ethiopia               | 4.7   |   |           |   | 1.6 |
| 26   | Jordan               | 5.6   |   |           |   | 1.1 | 88   | Romania                | 4.7   |   |           |   | 1.2 |
| 27   | El Salvador          | 5.6   |   |           |   | 1.0 | 89   | Greece                 | 4.6   |   |           |   | 1.5 |
| 28   | Hungary              | 5.6   |   |           |   | 1.0 | 90   | Kenya                  | 4.6   |   |           |   | 1.5 |
| 29   | Dominican Republic   | 5.6   |   |           |   | 1.1 | 91   | Algeria                | 4.6   |   |           |   | 1.9 |
| 30   | Israel               | 5.6   |   |           |   | 0.9 | 92   | Cameroon               | 4.5   |   |           |   | 1.5 |
| 31   | Burkina Faso         | 5.5   |   |           |   | 1.3 | 93   | Korea, Rep.            | 4.5   |   |           |   | 1.1 |
| 32   | Bahrain              | 5.5   |   |           |   | 1.3 | 94   | Croatia                | 4.5   |   |           |   | 1.3 |
| 33   | Malta                | 5.5   |   |           |   | 1.1 | 95   | Burundi                | 4.5   |   |           |   | 1.8 |
| 34   | India                | 5.5   |   |           |   | 1.2 | 96   | Egypt                  | 4.4   |   |           |   | 1.8 |
| 35   | Taiwan, China        | 5.5   |   |           |   | 1.0 | 97   | Lithuania              | 4.4   |   |           |   | 1.2 |
| 36   | Tanzania             | 5.5   |   |           |   | 1.2 | 98   | Guyana                 | 4.4   |   |           |   | 1.5 |
| 37   | United Arab Emirates | 5.5   |   |           |   | 1.3 | 99   | Georgia                | 4.4   |   |           |   | 1.0 |
| 38   | Mexico               | 5.5   |   |           |   | 1.3 | 100  | Tajikistan             | 4.4   |   |           |   | 1.6 |
| 39   | Trinidad and Tobago  | 5.5   |   |           |   | 1.1 | 101  | Italy                  | 4.4   |   |           |   | 1.0 |
| 40   | New Zealand          | 5.4   |   |           |   | 1.0 | 102  | Poland                 | 4.4   |   |           |   | 1.0 |
| 41   | Barbados             | 5.4   |   |           |   | 1.1 | 103  | Madagascar             | 4.3   |   |           |   | 1.5 |
| 42   | China                | 5.4   |   |           |   | 1.2 | 104  | Serbia and Montenegro  | 4.3   |   |           |   | 1.6 |
| 43   | Jamaica              | 5.4   |   |           |   | 1.2 | 105  | Nepal                  | 4.2   |   |           |   | 1.6 |
| 44   | United States        | 5.4   |   |           |   | 1.2 | 106  | Benin                  | 4.2   |   |           |   | 1.6 |
| 45   | Costa Rica           | 5.4   |   |           |   | 1.1 | 107  | Paraguay               | 4.2   |   |           |   | 1.6 |
| 46   | Spain                | 5.4   |   |           |   | 1.2 | 108  | Moldova                | 4.2   |   |           |   | 1.5 |
| 46   | Sri Lanka            | 5.4   |   |           |   | 1.4 | 109  | Slovenia               | 4.1   |   |           |   | 1.1 |
| 48   | Peru                 | 5.4   |   |           |   | 1.1 | 110  | Albania                | 4.0   |   |           |   | 1.4 |
| 49   | Norway               | 5.4   |   |           |   | 1.0 | 111  | Argentina              | 4.0   |   |           |   | 1.3 |
| 50   | Canada               | 5.3   |   |           |   | 1.0 | 112  | Suriname               | 3.9   |   |           |   | 1.5 |
| 51   | Australia            | 5.3   |   |           |   | 1.2 | 113  | Bulgaria               | 3.9   |   |           |   | 1.5 |
| 52   | Qatar                | 5.3   |   |           |   | 1.5 | 114  | Bosnia and Herzegovina | 3.9   |   |           |   | 1.8 |
| 53   | Mauritania           | 5.3   |   |           |   | 1.6 | 115  | Macedonia, FYR         | 3.9   |   |           |   | 1.5 |
| 54   | Nigeria              | 5.3   |   |           |   | 1.5 | 116  | Ecuador                | 3.9   |   |           |   | 1.2 |
| 55   | France               | 5.2   |   |           |   | 1.3 | 117  | Ukraine                | 3.8   |   |           |   | 1.2 |
| 56   | Armenia              | 5.2   |   |           |   | 1.2 | 118  | Kyrgyz Republic        | 3.8   |   |           |   | 1.4 |
| 57   | Cyprus               | 5.2   |   |           |   | 1.1 | 119  | Bolivia                | 3.8   |   |           |   | 1.4 |
| 58   | Thailand             | 5.2   |   |           |   | 1.1 | 120  | Venezuela              | 3.7   |   |           |   | 1.3 |
| 59   | Iceland              | 5.2   |   |           |   | 1.2 | 121  | Russian Federation     | 3.7   |   |           |   | 1.4 |
| 60   | Morocco              | 5.2   |   |           |   | 1.7 | 122  | Kuwait                 | 3.5   |   |           |   | 1.7 |
| 61   | Panama               | 5.2   |   |           |   | 1.3 | 123  | Chad                   | 3.3   |   |           |   | 1.8 |
| 62   | Cambodia             | 5.2   |   |           |   | 1.5 | 124  | Zimbabwe               | 2.8   |   |           |   | 1.5 |

SOURCE: World Economic Forum, Executive Opinion Survey 2006



## 1.04 Visa requirements

Visitor Visa Requirements Index, 2006

RANK COUNTRY/ECONOMY HARD DATA

|    |                             |       |
|----|-----------------------------|-------|
| 1  | Albania.....                | 100.0 |
| 1  | Argentina.....              | 100.0 |
| 1  | Bolivia.....                | 100.0 |
| 1  | Bosnia and Herzegovina..... | 100.0 |
| 1  | Bulgaria.....               | 100.0 |
| 1  | Colombia.....               | 100.0 |
| 1  | Cyprus.....                 | 100.0 |
| 1  | Ecuador.....                | 100.0 |
| 1  | Georgia.....                | 100.0 |
| 1  | Guyana.....                 | 100.0 |
| 1  | Jamaica.....                | 100.0 |
| 1  | Romania.....                | 100.0 |
| 1  | Serbia and Montenegro.....  | 100.0 |
| 1  | Ukraine.....                | 100.0 |
| 15 | Barbados.....               | 90.0  |
| 15 | Botswana.....               | 90.0  |
| 15 | Chile.....                  | 90.0  |
| 15 | Costa Rica.....             | 90.0  |
| 15 | Croatia.....                | 90.0  |
| 15 | Egypt.....                  | 90.0  |
| 15 | Hong Kong SAR.....          | 90.0  |
| 15 | Hungary.....                | 90.0  |
| 15 | Jordan.....                 | 90.0  |
| 15 | Korea, Rep.....             | 90.0  |
| 15 | Lithuania.....              | 90.0  |
| 15 | Macedonia, FYR.....         | 90.0  |
| 15 | Malaysia.....               | 90.0  |
| 15 | Mexico.....                 | 90.0  |
| 15 | Morocco.....                | 90.0  |
| 15 | Namibia.....                | 90.0  |
| 15 | Nicaragua.....              | 90.0  |
| 15 | Peru.....                   | 90.0  |
| 15 | Philippines.....            | 90.0  |
| 15 | Poland.....                 | 90.0  |
| 15 | Singapore.....              | 90.0  |
| 15 | Slovak Republic.....        | 90.0  |
| 15 | Slovenia.....               | 90.0  |
| 15 | Taiwan, China.....          | 90.0  |
| 15 | Thailand.....               | 90.0  |
| 15 | Turkey.....                 | 90.0  |
| 15 | Uruguay.....                | 90.0  |
| 15 | Venezuela.....              | 90.0  |
| 43 | Austria.....                | 80.0  |
| 43 | Belgium.....                | 80.0  |
| 43 | Canada.....                 | 80.0  |
| 43 | Czech Republic.....         | 80.0  |
| 43 | Denmark.....                | 80.0  |
| 43 | Dominican Republic.....     | 80.0  |
| 43 | El Salvador.....            | 80.0  |
| 43 | Estonia.....                | 80.0  |
| 43 | Finland.....                | 80.0  |
| 43 | France.....                 | 80.0  |
| 43 | Germany.....                | 80.0  |
| 43 | Greece.....                 | 80.0  |
| 43 | Guatemala.....              | 80.0  |
| 43 | Honduras.....               | 80.0  |
| 43 | Iceland.....                | 80.0  |
| 43 | Indonesia.....              | 80.0  |
| 43 | Ireland.....                | 80.0  |
| 43 | Israel.....                 | 80.0  |
| 43 | Italy.....                  | 80.0  |
| 43 | Japan.....                  | 80.0  |

RANK COUNTRY/ECONOMY HARD DATA

|     |                           |      |
|-----|---------------------------|------|
| 43  | Kuwait.....               | 80.0 |
| 43  | Latvia.....               | 80.0 |
| 43  | Lesotho.....              | 80.0 |
| 43  | Luxembourg.....           | 80.0 |
| 43  | Malawi.....               | 80.0 |
| 43  | Mauritius.....            | 80.0 |
| 43  | Nepal.....                | 80.0 |
| 43  | Netherlands.....          | 80.0 |
| 43  | New Zealand.....          | 80.0 |
| 43  | Norway.....               | 80.0 |
| 43  | Panama.....               | 80.0 |
| 43  | Portugal.....             | 80.0 |
| 43  | South Africa.....         | 80.0 |
| 43  | Spain.....                | 80.0 |
| 43  | Sri Lanka.....            | 80.0 |
| 43  | Sweden.....               | 80.0 |
| 43  | Switzerland.....          | 80.0 |
| 43  | Tunisia.....              | 80.0 |
| 43  | United Arab Emirates..... | 80.0 |
| 43  | United Kingdom.....       | 80.0 |
| 43  | United States.....        | 80.0 |
| 43  | Zimbabwe.....             | 80.0 |
| 85  | Bahrain.....              | 70.0 |
| 85  | Malta.....                | 70.0 |
| 85  | Qatar.....                | 70.0 |
| 85  | Trinidad and Tobago.....  | 70.0 |
| 89  | Brazil.....               | 60.0 |
| 89  | Paraguay.....             | 60.0 |
| 89  | Zambia.....               | 60.0 |
| 92  | Australia.....            | 50.0 |
| 92  | Gambia.....               | 50.0 |
| 94  | Cambodia.....             | 30.0 |
| 94  | China.....                | 30.0 |
| 94  | Kyrgyz Republic.....      | 30.0 |
| 94  | Moldova.....              | 30.0 |
| 94  | Mongolia.....             | 30.0 |
| 94  | Vietnam.....              | 30.0 |
| 100 | Armenia.....              | 20.0 |
| 100 | Azerbaijan.....           | 20.0 |
| 100 | Kazakhstan.....           | 20.0 |
| 100 | Pakistan.....             | 20.0 |
| 100 | Suriname.....             | 20.0 |
| 100 | Tajikistan.....           | 20.0 |
| 106 | Bangladesh.....           | 10.0 |
| 106 | Benin.....                | 10.0 |
| 106 | Burkina Faso.....         | 10.0 |
| 106 | Ethiopia.....             | 10.0 |
| 106 | India.....                | 10.0 |
| 106 | Russian Federation.....   | 10.0 |
| 106 | Tanzania.....             | 10.0 |
| 113 | Algeria.....              | 0.0  |
| 113 | Angola.....               | 0.0  |
| 113 | Burundi.....              | 0.0  |
| 113 | Cameroon.....             | 0.0  |
| 113 | Chad.....                 | 0.0  |
| 113 | Kenya.....                | 0.0  |
| 113 | Madagascar.....           | 0.0  |
| 113 | Mali.....                 | 0.0  |
| 113 | Mauritania.....           | 0.0  |
| 113 | Mozambique.....           | 0.0  |
| 113 | Nigeria.....              | 0.0  |
| 113 | Uganda.....               | 0.0  |

SOURCE: Booz Allen Hamilton Inc.

## 1.05 Openness of bilateral Air Service Agreements

Index of openness of bilateral Air Service Agreements, 2005

RANK COUNTRY/ECONOMY HARD DATA

|    |                           |      |  |
|----|---------------------------|------|--|
| 1  | El Salvador.....          | 33.7 |  |
| 2  | Honduras.....             | 32.7 |  |
| 3  | Guatemala.....            | 31.9 |  |
| 4  | Dominican Republic.....   | 28.9 |  |
| 5  | Nicaragua.....            | 26.5 |  |
| 6  | Jamaica.....              | 24.7 |  |
| 7  | Peru.....                 | 22.7 |  |
| 8  | United States.....        | 22.6 |  |
| 9  | Costa Rica.....           | 22.0 |  |
| 10 | Canada.....               | 20.2 |  |
| 11 | Panama.....               | 19.2 |  |
| 12 | Chile.....                | 18.9 |  |
| 12 | Poland.....               | 18.9 |  |
| 14 | Luxembourg.....           | 16.5 |  |
| 15 | Germany.....              | 16.4 |  |
| 16 | Iceland.....              | 15.6 |  |
| 17 | Denmark.....              | 15.3 |  |
| 18 | Portugal.....             | 15.1 |  |
| 19 | Japan.....                | 14.8 |  |
| 19 | Netherlands.....          | 14.8 |  |
| 21 | Mexico.....               | 14.6 |  |
| 22 | Barbados.....             | 14.1 |  |
| 23 | Suriname.....             | 13.6 |  |
| 24 | Hong Kong SAR.....        | 13.5 |  |
| 25 | New Zealand.....          | 13.4 |  |
| 26 | Ireland.....              | 13.3 |  |
| 27 | Philippines.....          | 13.1 |  |
| 28 | Italy.....                | 13.0 |  |
| 28 | Singapore.....            | 13.0 |  |
| 30 | Indonesia.....            | 12.9 |  |
| 31 | Czech Republic.....       | 12.8 |  |
| 32 | Belgium.....              | 12.6 |  |
| 33 | Ecuador.....              | 12.5 |  |
| 34 | Finland.....              | 12.4 |  |
| 35 | Paraguay.....             | 12.2 |  |
| 36 | Brazil.....               | 12.1 |  |
| 36 | Jordan.....               | 12.1 |  |
| 38 | United Kingdom.....       | 12.0 |  |
| 39 | Israel.....               | 11.9 |  |
| 40 | Colombia.....             | 11.8 |  |
| 41 | Korea, Rep.....           | 11.7 |  |
| 42 | Trinidad and Tobago.....  | 11.5 |  |
| 42 | Turkey.....               | 11.5 |  |
| 44 | United Arab Emirates..... | 11.3 |  |
| 45 | Croatia.....              | 11.2 |  |
| 45 | Hungary.....              | 11.2 |  |
| 45 | Uruguay.....              | 11.2 |  |
| 48 | Azerbaijan.....           | 11.1 |  |
| 49 | Namibia.....              | 10.9 |  |
| 50 | Greece.....               | 10.8 |  |
| 51 | Malaysia.....             | 10.7 |  |
| 51 | Qatar.....                | 10.7 |  |
| 53 | Austria.....              | 10.6 |  |
| 54 | Morocco.....              | 10.5 |  |
| 55 | Ethiopia.....             | 10.4 |  |
| 56 | Bahrain.....              | 10.2 |  |
| 57 | Tunisia.....              | 9.9  |  |
| 58 | Thailand.....             | 9.9  |  |
| 59 | South Africa.....         | 9.9  |  |
| 60 | Cameroon.....             | 9.8  |  |
| 61 | Switzerland.....          | 9.8  |  |
| 62 | Pakistan.....             | 9.6  |  |

RANK COUNTRY/ECONOMY HARD DATA

|     |                             |     |  |
|-----|-----------------------------|-----|--|
| 62  | Zambia.....                 | 9.6 |  |
| 64  | Bolivia.....                | 9.5 |  |
| 64  | Egypt.....                  | 9.5 |  |
| 66  | Albania.....                | 9.5 |  |
| 67  | Chad.....                   | 9.4 |  |
| 68  | Norway.....                 | 9.4 |  |
| 69  | France.....                 | 9.4 |  |
| 70  | Bosnia and Herzegovina..... | 9.3 |  |
| 70  | Malta.....                  | 9.3 |  |
| 72  | Australia.....              | 9.0 |  |
| 72  | Gambia.....                 | 9.0 |  |
| 72  | Sweden.....                 | 9.0 |  |
| 75  | Argentina.....              | 8.8 |  |
| 75  | Mozambique.....             | 8.8 |  |
| 75  | Slovak Republic.....        | 8.8 |  |
| 78  | Sri Lanka.....              | 8.6 |  |
| 79  | Romania.....                | 8.5 |  |
| 80  | Spain.....                  | 8.3 |  |
| 81  | Mauritania.....             | 8.2 |  |
| 82  | Serbia and Montenegro.....  | 8.2 |  |
| 83  | Cambodia.....               | 8.1 |  |
| 84  | Armenia.....                | 8.0 |  |
| 84  | Lithuania.....              | 8.0 |  |
| 84  | Venezuela.....              | 8.0 |  |
| 84  | Vietnam.....                | 8.0 |  |
| 88  | India.....                  | 7.9 |  |
| 89  | Malawi.....                 | 7.8 |  |
| 90  | Madagascar.....             | 7.7 |  |
| 91  | Nigeria.....                | 7.5 |  |
| 91  | Zimbabwe.....               | 7.5 |  |
| 93  | Bulgaria.....               | 7.0 |  |
| 94  | Kazakhstan.....             | 6.9 |  |
| 95  | Uganda.....                 | 6.7 |  |
| 96  | Botswana.....               | 6.5 |  |
| 97  | Mauritius.....              | 6.2 |  |
| 98  | Algeria.....                | 6.1 |  |
| 98  | Mali.....                   | 6.1 |  |
| 98  | Ukraine.....                | 6.1 |  |
| 101 | Guyana.....                 | 6.0 |  |
| 102 | Bangladesh.....             | 5.8 |  |
| 102 | Tanzania.....               | 5.8 |  |
| 104 | Mongolia.....               | 5.7 |  |
| 105 | China.....                  | 5.5 |  |
| 106 | Burundi.....                | 5.4 |  |
| 106 | Latvia.....                 | 5.4 |  |
| 108 | Kenya.....                  | 5.2 |  |
| 109 | Macedonia, FYR.....         | 5.1 |  |
| 110 | Georgia.....                | 4.9 |  |
| 111 | Cyprus.....                 | 4.6 |  |
| 112 | Kyrgyz Republic.....        | 4.5 |  |
| 113 | Moldova.....                | 4.4 |  |
| 114 | Russian Federation.....     | 4.2 |  |
| 115 | Benin.....                  | 3.9 |  |
| 115 | Slovenia.....               | 3.9 |  |
| 117 | Estonia.....                | 3.0 |  |
| 117 | Nepal.....                  | 3.0 |  |
| 119 | Kuwait.....                 | 2.3 |  |
| 120 | Burkina Faso.....           | 1.9 |  |
| 121 | Angola.....                 | 1.0 |  |
| 122 | Lesotho.....                | 0.1 |  |
| n/a | Taiwan, China.....          | n/a |  |
| n/a | Tajikistan.....             | n/a |  |

SOURCE: World Trade Organization

## Pillar 2

# Environmental regulation

## 2.01 Stringency of environmental regulation

How stringent is your country's environmental regulation? (1 = lax compared to most countries, 7 = among the world's most stringent)

| RANK | COUNTRY/ECONOMY      | SCORE | 1 | MEAN: 4.0 | 7 | SD  | RANK | COUNTRY/ECONOMY        | SCORE | 1 | MEAN: 4.0 | 7 | SD  |
|------|----------------------|-------|---|-----------|---|-----|------|------------------------|-------|---|-----------|---|-----|
| 1    | Germany              | 6.7   |   |           |   | 0.6 | 63   | Kenya                  | 3.7   |   |           |   | 1.4 |
| 2    | Denmark              | 6.6   |   |           |   | 0.7 | 64   | Georgia                | 3.6   |   |           |   | 1.7 |
| 3    | Austria              | 6.6   |   |           |   | 0.7 | 65   | Philippines            | 3.6   |   |           |   | 1.4 |
| 4    | Sweden               | 6.5   |   |           |   | 0.8 | 66   | Panama                 | 3.6   |   |           |   | 1.4 |
| 5    | Switzerland          | 6.5   |   |           |   | 0.7 | 67   | Burkina Faso           | 3.6   |   |           |   | 1.5 |
| 6    | Finland              | 6.4   |   |           |   | 0.8 | 68   | Tanzania               | 3.6   |   |           |   | 1.4 |
| 7    | Norway               | 6.3   |   |           |   | 0.6 | 69   | Bahrain                | 3.6   |   |           |   | 1.9 |
| 8    | Netherlands          | 6.2   |   |           |   | 0.9 | 70   | Dominican Republic     | 3.6   |   |           |   | 1.4 |
| 9    | New Zealand          | 6.2   |   |           |   | 0.7 | 71   | Jamaica                | 3.5   |   |           |   | 1.3 |
| 10   | Luxembourg           | 6.2   |   |           |   | 0.9 | 72   | Algeria                | 3.5   |   |           |   | 1.6 |
| 11   | Belgium              | 6.1   |   |           |   | 1.0 | 73   | Venezuela              | 3.5   |   |           |   | 1.6 |
| 12   | Japan                | 6.0   |   |           |   | 1.0 | 74   | Romania                | 3.5   |   |           |   | 1.6 |
| 13   | United Kingdom       | 5.9   |   |           |   | 1.0 | 75   | Uganda                 | 3.4   |   |           |   | 1.8 |
| 14   | France               | 5.8   |   |           |   | 1.1 | 76   | Botswana               | 3.4   |   |           |   | 1.4 |
| 15   | Canada               | 5.8   |   |           |   | 1.1 | 77   | Pakistan               | 3.4   |   |           |   | 1.4 |
| 16   | Australia            | 5.8   |   |           |   | 0.9 | 78   | Guatemala              | 3.4   |   |           |   | 1.4 |
| 17   | Iceland              | 5.7   |   |           |   | 1.0 | 79   | Zimbabwe               | 3.4   |   |           |   | 1.3 |
| 18   | Singapore            | 5.7   |   |           |   | 1.0 | 80   | Sri Lanka              | 3.4   |   |           |   | 1.3 |
| 19   | Czech Republic       | 5.5   |   |           |   | 1.2 | 81   | Kuwait                 | 3.4   |   |           |   | 1.6 |
| 20   | Taiwan, China        | 5.4   |   |           |   | 1.2 | 82   | Morocco                | 3.3   |   |           |   | 1.6 |
| 21   | United States        | 5.4   |   |           |   | 1.4 | 83   | Mali                   | 3.3   |   |           |   | 1.4 |
| 22   | Portugal             | 5.3   |   |           |   | 0.9 | 84   | Honduras               | 3.3   |   |           |   | 1.4 |
| 23   | Slovenia             | 5.3   |   |           |   | 1.0 | 85   | Kazakhstan             | 3.3   |   |           |   | 1.5 |
| 24   | Ireland              | 5.3   |   |           |   | 1.2 | 86   | Trinidad and Tobago    | 3.2   |   |           |   | 1.7 |
| 25   | Malaysia             | 5.3   |   |           |   | 1.1 | 87   | Argentina              | 3.2   |   |           |   | 1.5 |
| 26   | Tunisia              | 5.2   |   |           |   | 1.1 | 88   | Malawi                 | 3.2   |   |           |   | 1.5 |
| 27   | Chile                | 5.1   |   |           |   | 1.1 | 89   | Bolivia                | 3.2   |   |           |   | 1.5 |
| 28   | Brazil               | 5.1   |   |           |   | 1.7 | 90   | Bulgaria               | 3.1   |   |           |   | 1.5 |
| 29   | Hungary              | 5.1   |   |           |   | 1.2 | 91   | Moldova                | 3.1   |   |           |   | 1.4 |
| 30   | Slovak Republic      | 5.1   |   |           |   | 1.3 | 92   | Egypt                  | 3.1   |   |           |   | 1.7 |
| 31   | Costa Rica           | 5.0   |   |           |   | 1.2 | 93   | Ecuador                | 3.1   |   |           |   | 1.2 |
| 32   | Italy                | 5.0   |   |           |   | 1.5 | 94   | Nigeria                | 3.0   |   |           |   | 1.6 |
| 33   | South Africa         | 4.8   |   |           |   | 1.3 | 95   | Armenia                | 3.0   |   |           |   | 1.4 |
| 34   | Hong Kong SAR        | 4.8   |   |           |   | 1.3 | 96   | Cambodia               | 3.0   |   |           |   | 1.5 |
| 35   | United Arab Emirates | 4.8   |   |           |   | 1.6 | 97   | China                  | 3.0   |   |           |   | 1.3 |
| 36   | Estonia              | 4.7   |   |           |   | 1.4 | 98   | Guyana                 | 3.0   |   |           |   | 1.3 |
| 37   | Lithuania            | 4.7   |   |           |   | 1.3 | 99   | Tajikistan             | 2.9   |   |           |   | 1.4 |
| 38   | Israel               | 4.7   |   |           |   | 1.1 | 100  | Paraguay               | 2.9   |   |           |   | 1.7 |
| 39   | Spain                | 4.6   |   |           |   | 1.3 | 101  | Indonesia              | 2.9   |   |           |   | 0.7 |
| 40   | Korea, Rep.          | 4.6   |   |           |   | 1.2 | 102  | Mozambique             | 2.9   |   |           |   | 1.3 |
| 41   | India                | 4.5   |   |           |   | 1.5 | 103  | Russian Federation     | 2.9   |   |           |   | 1.5 |
| 42   | Qatar                | 4.4   |   |           |   | 1.5 | 104  | Mauritania             | 2.9   |   |           |   | 1.6 |
| 43   | Latvia               | 4.4   |   |           |   | 1.4 | 105  | Bangladesh             | 2.9   |   |           |   | 1.5 |
| 44   | Thailand             | 4.4   |   |           |   | 1.1 | 106  | Macedonia, FYR         | 2.9   |   |           |   | 1.6 |
| 45   | Colombia             | 4.3   |   |           |   | 1.4 | 107  | Ukraine                | 2.9   |   |           |   | 1.5 |
| 46   | Uruguay              | 4.2   |   |           |   | 1.2 | 108  | Nepal                  | 2.9   |   |           |   | 1.3 |
| 47   | Mauritius            | 4.2   |   |           |   | 0.9 | 108  | Vietnam                | 2.9   |   |           |   | 1.3 |
| 48   | Croatia              | 4.2   |   |           |   | 1.4 | 110  | Nicaragua              | 2.8   |   |           |   | 1.3 |
| 49   | Mexico               | 4.2   |   |           |   | 1.4 | 111  | Azerbaijan             | 2.8   |   |           |   | 1.5 |
| 50   | Greece               | 4.1   |   |           |   | 1.4 | 112  | Burundi                | 2.7   |   |           |   | 1.5 |
| 51   | Poland               | 4.1   |   |           |   | 1.1 | 113  | Cameroon               | 2.7   |   |           |   | 1.2 |
| 52   | Namibia              | 4.0   |   |           |   | 1.4 | 114  | Kyrgyz Republic        | 2.7   |   |           |   | 1.3 |
| 53   | El Salvador          | 4.0   |   |           |   | 1.4 | 115  | Serbia and Montenegro  | 2.6   |   |           |   | 1.4 |
| 54   | Malta                | 4.0   |   |           |   | 1.2 | 116  | Ethiopia               | 2.6   |   |           |   | 1.3 |
| 55   | Barbados             | 3.9   |   |           |   | 1.4 | 117  | Bosnia and Herzegovina | 2.6   |   |           |   | 1.3 |
| 56   | Turkey               | 3.9   |   |           |   | 1.3 | 118  | Lesotho                | 2.6   |   |           |   | 1.3 |
| 57   | Peru                 | 3.8   |   |           |   | 1.3 | 119  | Zambia                 | 2.5   |   |           |   | 1.3 |
| 58   | Jordan               | 3.7   |   |           |   | 1.4 | 120  | Angola                 | 2.4   |   |           |   | 0.9 |
| 59   | Cyprus               | 3.7   |   |           |   | 1.4 | 121  | Chad                   | 2.4   |   |           |   | 1.4 |
| 60   | Madagascar           | 3.7   |   |           |   | 1.3 | 122  | Mongolia               | 2.3   |   |           |   | 1.3 |
| 61   | Benin                | 3.7   |   |           |   | 1.4 | 123  | Suriname               | 2.2   |   |           |   | 1.2 |
| 62   | Gambia               | 3.7   |   |           |   | 1.3 | 124  | Albania                | 2.2   |   |           |   | 1.1 |

SOURCE: World Economic Forum, Executive Opinion Survey 2006

## 2.02 Clarity and stability of environmental regulations

Environmental regulations in your country are (1 = confusing and enforced erratically, 7 = stable and enforced consistently and fairly)

| RANK | COUNTRY/ECONOMY      | SCORE | 1 | MEAN: 3.9 | 7 | SD  | RANK | COUNTRY/ECONOMY        | SCORE | 1 | MEAN: 3.9 | 7 | SD  |
|------|----------------------|-------|---|-----------|---|-----|------|------------------------|-------|---|-----------|---|-----|
| 1    | Denmark              | 6.4   |   |           |   | 0.8 | 63   | Kenya                  | 3.6   |   |           |   | 1.6 |
| 2    | Switzerland          | 6.1   |   |           |   | 0.8 | 64   | Turkey                 | 3.6   |   |           |   | 1.1 |
| 3    | Germany              | 6.0   |   |           |   | 1.0 | 65   | Pakistan               | 3.5   |   |           |   | 1.4 |
| 4    | Norway               | 6.0   |   |           |   | 0.7 | 66   | Zimbabwe               | 3.5   |   |           |   | 1.3 |
| 5    | Finland              | 6.0   |   |           |   | 1.2 | 67   | Peru                   | 3.5   |   |           |   | 1.3 |
| 6    | Sweden               | 5.9   |   |           |   | 1.1 | 68   | Madagascar             | 3.4   |   |           |   | 1.3 |
| 7    | Singapore            | 5.8   |   |           |   | 0.9 | 69   | El Salvador            | 3.4   |   |           |   | 1.4 |
| 8    | Austria              | 5.8   |   |           |   | 0.9 | 70   | Indonesia              | 3.4   |   |           |   | 0.9 |
| 9    | Japan                | 5.7   |   |           |   | 1.1 | 71   | Bahrain                | 3.4   |   |           |   | 1.9 |
| 10   | Iceland              | 5.7   |   |           |   | 0.9 | 72   | Moldova                | 3.4   |   |           |   | 1.5 |
| 11   | United Kingdom       | 5.7   |   |           |   | 1.1 | 73   | Kuwait                 | 3.4   |   |           |   | 1.5 |
| 12   | Netherlands          | 5.6   |   |           |   | 1.1 | 74   | Dominican Republic     | 3.4   |   |           |   | 1.3 |
| 13   | Luxembourg           | 5.5   |   |           |   | 1.1 | 75   | Cambodia               | 3.3   |   |           |   | 1.5 |
| 14   | Australia            | 5.4   |   |           |   | 1.3 | 76   | China                  | 3.3   |   |           |   | 1.3 |
| 15   | New Zealand          | 5.3   |   |           |   | 1.3 | 77   | Uganda                 | 3.3   |   |           |   | 1.8 |
| 16   | France               | 5.3   |   |           |   | 1.3 | 78   | Tajikistan             | 3.3   |   |           |   | 1.6 |
| 17   | Tunisia              | 5.2   |   |           |   | 1.2 | 79   | Algeria                | 3.3   |   |           |   | 1.6 |
| 18   | Canada               | 5.2   |   |           |   | 1.4 | 80   | Malawi                 | 3.3   |   |           |   | 1.6 |
| 19   | United States        | 5.1   |   |           |   | 1.4 | 81   | Sri Lanka              | 3.3   |   |           |   | 1.4 |
| 20   | Taiwan, China        | 5.1   |   |           |   | 1.2 | 82   | Benin                  | 3.3   |   |           |   | 1.5 |
| 21   | Belgium              | 5.0   |   |           |   | 1.6 | 83   | Romania                | 3.3   |   |           |   | 1.5 |
| 22   | Slovenia             | 5.0   |   |           |   | 1.0 | 84   | Nigeria                | 3.2   |   |           |   | 1.7 |
| 23   | Malaysia             | 4.9   |   |           |   | 1.3 | 85   | Panama                 | 3.2   |   |           |   | 1.3 |
| 24   | Ireland              | 4.9   |   |           |   | 1.5 | 86   | Jamaica                | 3.2   |   |           |   | 1.3 |
| 25   | Hong Kong SAR        | 4.8   |   |           |   | 1.4 | 87   | Trinidad and Tobago    | 3.2   |   |           |   | 1.6 |
| 26   | Qatar                | 4.6   |   |           |   | 1.4 | 88   | Guatemala              | 3.1   |   |           |   | 1.1 |
| 27   | Israel               | 4.6   |   |           |   | 1.0 | 89   | Mali                   | 3.1   |   |           |   | 1.5 |
| 28   | Estonia              | 4.6   |   |           |   | 1.3 | 89   | Mauritania             | 3.1   |   |           |   | 1.8 |
| 29   | Korea, Rep.          | 4.6   |   |           |   | 1.3 | 91   | Morocco                | 3.1   |   |           |   | 1.5 |
| 30   | United Arab Emirates | 4.6   |   |           |   | 1.7 | 92   | Mozambique             | 3.1   |   |           |   | 1.4 |
| 31   | South Africa         | 4.5   |   |           |   | 1.4 | 93   | Egypt                  | 3.1   |   |           |   | 1.6 |
| 32   | Portugal             | 4.5   |   |           |   | 0.9 | 94   | Kyrgyz Republic        | 3.1   |   |           |   | 1.4 |
| 33   | Slovak Republic      | 4.5   |   |           |   | 1.3 | 95   | Lesotho                | 3.1   |   |           |   | 1.5 |
| 34   | Hungary              | 4.5   |   |           |   | 1.2 | 96   | Macedonia, FYR         | 3.1   |   |           |   | 1.5 |
| 35   | Czech Republic       | 4.4   |   |           |   | 1.4 | 97   | Philippines            | 3.1   |   |           |   | 1.2 |
| 36   | Latvia               | 4.3   |   |           |   | 1.4 | 98   | Ukraine                | 3.1   |   |           |   | 1.4 |
| 37   | Chile                | 4.3   |   |           |   | 1.4 | 99   | Nepal                  | 3.0   |   |           |   | 1.5 |
| 38   | Thailand             | 4.2   |   |           |   | 1.1 | 100  | Guyana                 | 3.0   |   |           |   | 1.3 |
| 39   | Spain                | 4.2   |   |           |   | 1.3 | 101  | Vietnam                | 3.0   |   |           |   | 1.2 |
| 40   | Italy                | 4.2   |   |           |   | 1.4 | 102  | Bolivia                | 3.0   |   |           |   | 1.2 |
| 41   | Costa Rica           | 4.2   |   |           |   | 1.3 | 103  | Azerbaijan             | 3.0   |   |           |   | 1.5 |
| 42   | Namibia              | 4.2   |   |           |   | 1.2 | 104  | Venezuela              | 3.0   |   |           |   | 1.4 |
| 43   | Tanzania             | 4.2   |   |           |   | 1.4 | 105  | Bosnia and Herzegovina | 3.0   |   |           |   | 1.4 |
| 44   | Gambia               | 4.1   |   |           |   | 1.3 | 106  | Honduras               | 2.9   |   |           |   | 1.2 |
| 45   | Lithuania            | 4.1   |   |           |   | 1.4 | 107  | Bulgaria               | 2.9   |   |           |   | 1.4 |
| 46   | Uruguay              | 4.1   |   |           |   | 1.3 | 108  | Nicaragua              | 2.9   |   |           |   | 1.3 |
| 47   | Mauritius            | 4.0   |   |           |   | 1.2 | 109  | Russian Federation     | 2.9   |   |           |   | 1.4 |
| 48   | Poland               | 4.0   |   |           |   | 1.1 | 110  | Argentina              | 2.9   |   |           |   | 1.4 |
| 49   | India                | 4.0   |   |           |   | 1.4 | 111  | Ecuador                | 2.8   |   |           |   | 1.1 |
| 50   | Brazil               | 3.9   |   |           |   | 1.6 | 112  | Cameroon               | 2.7   |   |           |   | 1.3 |
| 51   | Mexico               | 3.8   |   |           |   | 1.4 | 113  | Armenia                | 2.7   |   |           |   | 1.4 |
| 52   | Croatia              | 3.8   |   |           |   | 1.5 | 114  | Angola                 | 2.7   |   |           |   | 1.2 |
| 53   | Malta                | 3.8   |   |           |   | 1.2 | 114  | Burundi                | 2.7   |   |           |   | 1.5 |
| 54   | Botswana             | 3.8   |   |           |   | 1.3 | 116  | Bangladesh             | 2.7   |   |           |   | 1.3 |
| 55   | Greece               | 3.7   |   |           |   | 1.4 | 117  | Mongolia               | 2.7   |   |           |   | 1.2 |
| 56   | Barbados             | 3.7   |   |           |   | 1.3 | 118  | Ethiopia               | 2.6   |   |           |   | 1.4 |
| 57   | Cyprus               | 3.7   |   |           |   | 1.3 | 119  | Suriname               | 2.5   |   |           |   | 1.2 |
| 58   | Jordan               | 3.7   |   |           |   | 1.5 | 120  | Paraguay               | 2.4   |   |           |   | 1.3 |
| 59   | Colombia             | 3.7   |   |           |   | 1.2 | 121  | Serbia and Montenegro  | 2.4   |   |           |   | 1.3 |
| 60   | Kazakhstan           | 3.7   |   |           |   | 1.3 | 122  | Zambia                 | 2.2   |   |           |   | 1.3 |
| 61   | Burkina Faso         | 3.6   |   |           |   | 1.6 | 123  | Albania                | 2.2   |   |           |   | 1.1 |
| 62   | Georgia              | 3.6   |   |           |   | 1.6 | 124  | Chad                   | 2.1   |   |           |   | 1.2 |

SOURCE: World Economic Forum, Executive Opinion Survey 2006

## 2.03 Government prioritization of sustainable Travel & Tourism

Is your country's government taking the necessary steps to ensure that the T&T sector is being developed in a sustainable way?  
(1 = no, development of the sector does not take into account issues related to environmental protection and sustainable development,  
7 = yes, sustainable development issues are at the core of the government's strategy with regard to the industry's development)

| RANK | COUNTRY/ECONOMY           | SCORE | 1 | MEAN: 4.6 | 7 | SD  | RANK | COUNTRY/ECONOMY             | SCORE | 1 | MEAN: 4.6 | 7 | SD  |
|------|---------------------------|-------|---|-----------|---|-----|------|-----------------------------|-------|---|-----------|---|-----|
| 1    | Singapore.....            | 6.2   |   |           |   | 0.7 | 63   | Spain.....                  | 4.7   |   |           |   | 1.6 |
| 2    | New Zealand.....          | 6.0   |   |           |   | 0.7 | 64   | Korea, Rep.....             | 4.6   |   |           |   | 0.9 |
| 3    | Tunisia.....              | 6.0   |   |           |   | 1.1 | 65   | Indonesia.....              | 4.6   |   |           |   | 1.4 |
| 4    | Austria.....              | 5.9   |   |           |   | 1.0 | 66   | Dominican Republic.....     | 4.6   |   |           |   | 1.5 |
| 5    | United Arab Emirates..... | 5.9   |   |           |   | 1.3 | 67   | Uruguay.....                | 4.6   |   |           |   | 1.3 |
| 6    | Hong Kong SAR.....        | 5.8   |   |           |   | 1.4 | 68   | Czech Republic.....         | 4.5   |   |           |   | 1.2 |
| 7    | Mauritius.....            | 5.8   |   |           |   | 0.8 | 69   | El Salvador.....            | 4.5   |   |           |   | 1.6 |
| 8    | Malaysia.....             | 5.7   |   |           |   | 1.0 | 69   | Guatemala.....              | 4.5   |   |           |   | 1.4 |
| 9    | Barbados.....             | 5.7   |   |           |   | 1.3 | 71   | Georgia.....                | 4.4   |   |           |   | 1.5 |
| 10   | Qatar.....                | 5.6   |   |           |   | 1.2 | 72   | Mozambique.....             | 4.4   |   |           |   | 1.6 |
| 11   | Finland.....              | 5.6   |   |           |   | 1.1 | 73   | Chile.....                  | 4.4   |   |           |   | 1.3 |
| 12   | Switzerland.....          | 5.6   |   |           |   | 1.1 | 74   | Colombia.....               | 4.4   |   |           |   | 1.2 |
| 13   | Australia.....            | 5.6   |   |           |   | 0.9 | 75   | Honduras.....               | 4.3   |   |           |   | 1.6 |
| 14   | South Africa.....         | 5.5   |   |           |   | 1.0 | 76   | Tajikistan.....             | 4.3   |   |           |   | 1.8 |
| 15   | Iceland.....              | 5.5   |   |           |   | 1.1 | 77   | Guyana.....                 | 4.3   |   |           |   | 1.5 |
| 16   | Germany.....              | 5.5   |   |           |   | 1.2 | 78   | Benin.....                  | 4.3   |   |           |   | 1.5 |
| 17   | Zambia.....               | 5.4   |   |           |   | 1.4 | 79   | Peru.....                   | 4.3   |   |           |   | 1.2 |
| 18   | Morocco.....              | 5.4   |   |           |   | 1.3 | 80   | Philippines.....            | 4.2   |   |           |   | 1.5 |
| 19   | Gambia.....               | 5.4   |   |           |   | 1.6 | 81   | China.....                  | 4.2   |   |           |   | 1.4 |
| 20   | Tanzania.....             | 5.4   |   |           |   | 1.2 | 82   | Slovak Republic.....        | 4.2   |   |           |   | 1.2 |
| 21   | Ireland.....              | 5.4   |   |           |   | 1.6 | 83   | Malawi.....                 | 4.2   |   |           |   | 1.5 |
| 22   | Denmark.....              | 5.4   |   |           |   | 1.0 | 84   | Latvia.....                 | 4.2   |   |           |   | 1.4 |
| 23   | France.....               | 5.4   |   |           |   | 1.2 | 85   | Nicaragua.....              | 4.2   |   |           |   | 1.5 |
| 24   | Greece.....               | 5.4   |   |           |   | 1.2 | 86   | Bahrain.....                | 4.2   |   |           |   | 2.0 |
| 25   | Cyprus.....               | 5.3   |   |           |   | 1.2 | 87   | Brazil.....                 | 4.2   |   |           |   | 1.4 |
| 26   | Canada.....               | 5.3   |   |           |   | 1.0 | 88   | Nepal.....                  | 4.1   |   |           |   | 1.6 |
| 27   | Israel.....               | 5.3   |   |           |   | 1.0 | 89   | Algeria.....                | 4.1   |   |           |   | 1.6 |
| 28   | Portugal.....             | 5.3   |   |           |   | 1.0 | 90   | Armenia.....                | 4.1   |   |           |   | 1.7 |
| 29   | Luxembourg.....           | 5.3   |   |           |   | 1.4 | 91   | Argentina.....              | 4.1   |   |           |   | 1.4 |
| 30   | Netherlands.....          | 5.2   |   |           |   | 1.3 | 92   | Lithuania.....              | 4.1   |   |           |   | 1.2 |
| 31   | Burkina Faso.....         | 5.2   |   |           |   | 1.5 | 93   | Kazakhstan.....             | 4.0   |   |           |   | 1.5 |
| 32   | Belgium.....              | 5.2   |   |           |   | 1.1 | 94   | Mauritania.....             | 4.0   |   |           |   | 2.0 |
| 33   | Norway.....               | 5.2   |   |           |   | 1.0 | 95   | Moldova.....                | 3.9   |   |           |   | 1.6 |
| 34   | Jordan.....               | 5.2   |   |           |   | 1.3 | 96   | Lesotho.....                | 3.9   |   |           |   | 1.5 |
| 35   | Sweden.....               | 5.2   |   |           |   | 0.9 | 97   | Poland.....                 | 3.9   |   |           |   | 0.9 |
| 36   | Egypt.....                | 5.2   |   |           |   | 1.4 | 98   | Pakistan.....               | 3.8   |   |           |   | 1.5 |
| 37   | Thailand.....             | 5.1   |   |           |   | 1.4 | 99   | Azerbaijan.....             | 3.8   |   |           |   | 1.6 |
| 38   | Botswana.....             | 5.1   |   |           |   | 1.5 | 100  | Kyrgyz Republic.....        | 3.7   |   |           |   | 1.7 |
| 39   | Mali.....                 | 5.1   |   |           |   | 1.4 | 101  | Mongolia.....               | 3.7   |   |           |   | 1.7 |
| 40   | Cambodia.....             | 5.1   |   |           |   | 1.6 | 102  | Angola.....                 | 3.7   |   |           |   | 1.4 |
| 41   | Uganda.....               | 5.1   |   |           |   | 1.7 | 103  | Zimbabwe.....               | 3.7   |   |           |   | 1.5 |
| 42   | Taiwan, China.....        | 5.1   |   |           |   | 1.0 | 104  | Bulgaria.....               | 3.7   |   |           |   | 1.5 |
| 43   | Mexico.....               | 5.1   |   |           |   | 1.2 | 105  | Ethiopia.....               | 3.7   |   |           |   | 1.6 |
| 44   | United Kingdom.....       | 5.0   |   |           |   | 1.4 | 106  | Italy.....                  | 3.6   |   |           |   | 1.4 |
| 45   | Estonia.....              | 5.0   |   |           |   | 1.3 | 107  | Trinidad and Tobago.....    | 3.6   |   |           |   | 1.7 |
| 46   | Jamaica.....              | 5.0   |   |           |   | 1.4 | 108  | Chad.....                   | 3.4   |   |           |   | 1.8 |
| 47   | Kenya.....                | 5.0   |   |           |   | 1.7 | 109  | Ecuador.....                | 3.4   |   |           |   | 1.3 |
| 48   | India.....                | 4.9   |   |           |   | 1.1 | 110  | Bangladesh.....             | 3.3   |   |           |   | 1.6 |
| 49   | United States.....        | 4.9   |   |           |   | 1.5 | 111  | Kuwait.....                 | 3.3   |   |           |   | 1.5 |
| 50   | Malta.....                | 4.9   |   |           |   | 1.2 | 112  | Cameroon.....               | 3.3   |   |           |   | 1.6 |
| 51   | Vietnam.....              | 4.9   |   |           |   | 1.4 | 113  | Suriname.....               | 3.3   |   |           |   | 1.4 |
| 52   | Croatia.....              | 4.8   |   |           |   | 1.4 | 114  | Ukraine.....                | 3.2   |   |           |   | 1.3 |
| 53   | Nigeria.....              | 4.8   |   |           |   | 1.6 | 115  | Romania.....                | 3.2   |   |           |   | 1.4 |
| 54   | Sri Lanka.....            | 4.8   |   |           |   | 1.6 | 116  | Albania.....                | 3.2   |   |           |   | 1.6 |
| 55   | Japan.....                | 4.8   |   |           |   | 1.1 | 117  | Serbia and Montenegro.....  | 3.1   |   |           |   | 1.4 |
| 56   | Madagascar.....           | 4.8   |   |           |   | 1.4 | 118  | Burundi.....                | 3.1   |   |           |   | 1.7 |
| 57   | Slovenia.....             | 4.8   |   |           |   | 1.3 | 119  | Macedonia, FYR.....         | 3.1   |   |           |   | 1.2 |
| 58   | Namibia.....              | 4.8   |   |           |   | 1.5 | 120  | Russian Federation.....     | 3.0   |   |           |   | 1.4 |
| 59   | Hungary.....              | 4.7   |   |           |   | 1.2 | 121  | Bosnia and Herzegovina..... | 2.8   |   |           |   | 1.3 |
| 60   | Costa Rica.....           | 4.7   |   |           |   | 1.5 | 122  | Venezuela.....              | 2.7   |   |           |   | 1.5 |
| 61   | Turkey.....               | 4.7   |   |           |   | 1.2 | 123  | Bolivia.....                | 2.7   |   |           |   | 1.1 |
| 62   | Panama.....               | 4.7   |   |           |   | 1.4 | 124  | Paraguay.....               | 2.7   |   |           |   | 1.4 |

SOURCE: World Economic Forum, Executive Opinion Survey 2006

## Pillar 3

# Safety and security

### 3.01 Business costs of terrorism

The threat of terrorism in your country (1 = imposes significant costs on business, 7 = does not impose significant costs on business)

| RANK | COUNTRY/ECONOMY              | SCORE | 1 | MEAN: 5.0 | 7 | SD  | RANK | COUNTRY/ECONOMY           | SCORE | 1 | MEAN: 5.0 | 7 | SD  |
|------|------------------------------|-------|---|-----------|---|-----|------|---------------------------|-------|---|-----------|---|-----|
| 1    | Finland .....                | 6.3   |   |           |   | 1.3 | 63   | Korea, Rep. ....          | 5.2   |   |           |   | 1.6 |
| 2    | Uruguay .....                | 6.2   |   |           |   | 1.5 | 64   | Paraguay .....            | 5.1   |   |           |   | 1.9 |
| 3    | Brazil .....                 | 6.2   |   |           |   | 1.5 | 65   | Malaysia .....            | 5.1   |   |           |   | 1.8 |
| 4    | Hungary .....                | 6.2   |   |           |   | 1.4 | 66   | Panama .....              | 5.1   |   |           |   | 1.9 |
| 5    | Zimbabwe .....               | 6.1   |   |           |   | 1.4 | 67   | Madagascar .....          | 5.1   |   |           |   | 2.0 |
| 6    | Bosnia and Herzegovina ..... | 6.1   |   |           |   | 1.5 | 68   | France .....              | 5.1   |   |           |   | 1.5 |
| 7    | Slovak Republic .....        | 6.1   |   |           |   | 1.5 | 69   | Barbados .....            | 5.1   |   |           |   | 1.8 |
| 8    | Zambia .....                 | 6.1   |   |           |   | 1.4 | 69   | Cyprus .....              | 5.1   |   |           |   | 2.1 |
| 9    | Portugal .....               | 6.0   |   |           |   | 1.5 | 71   | Kuwait .....              | 5.1   |   |           |   | 1.7 |
| 10   | Austria .....                | 6.0   |   |           |   | 1.4 | 72   | Nicaragua .....           | 5.1   |   |           |   | 1.9 |
| 10   | Dominican Republic .....     | 6.0   |   |           |   | 1.2 | 73   | Jamaica .....             | 5.0   |   |           |   | 1.8 |
| 12   | Argentina .....              | 5.9   |   |           |   | 1.7 | 74   | Canada .....              | 5.0   |   |           |   | 1.5 |
| 13   | Costa Rica .....             | 5.9   |   |           |   | 1.4 | 75   | Denmark .....             | 5.0   |   |           |   | 1.6 |
| 14   | Mauritius .....              | 5.9   |   |           |   | 1.3 | 76   | Azerbaijan .....          | 5.0   |   |           |   | 2.2 |
| 15   | Tunisia .....                | 5.9   |   |           |   | 1.4 | 77   | Singapore .....           | 5.0   |   |           |   | 1.5 |
| 16   | New Zealand .....            | 5.8   |   |           |   | 1.5 | 78   | Australia .....           | 5.0   |   |           |   | 1.5 |
| 17   | Gambia .....                 | 5.8   |   |           |   | 1.5 | 79   | Moldova .....             | 4.9   |   |           |   | 1.9 |
| 18   | Angola .....                 | 5.8   |   |           |   | 1.7 | 80   | Thailand .....            | 4.9   |   |           |   | 1.7 |
| 19   | Luxembourg .....             | 5.8   |   |           |   | 1.6 | 81   | Italy .....               | 4.9   |   |           |   | 1.7 |
| 20   | Chile .....                  | 5.8   |   |           |   | 1.7 | 82   | Suriname .....            | 4.9   |   |           |   | 1.9 |
| 21   | Indonesia .....              | 5.8   |   |           |   | 1.3 | 83   | Netherlands .....         | 4.8   |   |           |   | 1.5 |
| 22   | Botswana .....               | 5.7   |   |           |   | 1.8 | 84   | India .....               | 4.8   |   |           |   | 1.6 |
| 22   | Slovenia .....               | 5.7   |   |           |   | 1.9 | 85   | Belgium .....             | 4.8   |   |           |   | 1.8 |
| 24   | Greece .....                 | 5.7   |   |           |   | 1.5 | 86   | Guatemala .....           | 4.8   |   |           |   | 1.8 |
| 25   | Hong Kong SAR .....          | 5.7   |   |           |   | 1.8 | 87   | Cambodia .....            | 4.7   |   |           |   | 1.8 |
| 26   | Sweden .....                 | 5.7   |   |           |   | 2.0 | 88   | Morocco .....             | 4.7   |   |           |   | 1.8 |
| 27   | Croatia .....                | 5.7   |   |           |   | 1.9 | 89   | Kazakhstan .....          | 4.6   |   |           |   | 1.9 |
| 28   | Czech Republic .....         | 5.6   |   |           |   | 1.5 | 90   | Turkey .....              | 4.6   |   |           |   | 1.7 |
| 29   | Cameroon .....               | 5.6   |   |           |   | 1.9 | 91   | Albania .....             | 4.5   |   |           |   | 2.2 |
| 30   | Germany .....                | 5.6   |   |           |   | 1.2 | 92   | Honduras .....            | 4.5   |   |           |   | 2.1 |
| 31   | Mongolia .....               | 5.6   |   |           |   | 2.0 | 93   | Poland .....              | 4.5   |   |           |   | 1.4 |
| 32   | Malta .....                  | 5.6   |   |           |   | 1.7 | 94   | Venezuela .....           | 4.5   |   |           |   | 2.0 |
| 33   | Estonia .....                | 5.6   |   |           |   | 1.9 | 95   | Bulgaria .....            | 4.5   |   |           |   | 2.0 |
| 34   | Lithuania .....              | 5.6   |   |           |   | 1.8 | 96   | Jordan .....              | 4.4   |   |           |   | 1.8 |
| 35   | Iceland .....                | 5.6   |   |           |   | 2.3 | 97   | Japan .....               | 4.4   |   |           |   | 1.7 |
| 36   | Benin .....                  | 5.5   |   |           |   | 1.8 | 98   | Spain .....               | 4.4   |   |           |   | 1.9 |
| 37   | Mauritania .....             | 5.4   |   |           |   | 2.1 | 99   | Bahrain .....             | 4.3   |   |           |   | 1.9 |
| 38   | Namibia .....                | 5.4   |   |           |   | 1.8 | 100  | Chad .....                | 4.3   |   |           |   | 2.2 |
| 39   | Armenia .....                | 5.4   |   |           |   | 1.9 | 101  | Peru .....                | 4.3   |   |           |   | 1.8 |
| 40   | Switzerland .....            | 5.4   |   |           |   | 1.6 | 102  | Egypt .....               | 4.3   |   |           |   | 2.2 |
| 41   | Serbia and Montenegro .....  | 5.4   |   |           |   | 1.8 | 103  | Russian Federation .....  | 4.3   |   |           |   | 1.9 |
| 42   | United Arab Emirates .....   | 5.4   |   |           |   | 1.6 | 104  | China .....               | 4.2   |   |           |   | 1.7 |
| 43   | South Africa .....           | 5.4   |   |           |   | 1.6 | 105  | Macedonia, FYR .....      | 4.2   |   |           |   | 2.0 |
| 43   | Ukraine .....                | 5.4   |   |           |   | 1.8 | 106  | Kyrgyz Republic .....     | 4.2   |   |           |   | 2.0 |
| 45   | Georgia .....                | 5.3   |   |           |   | 1.7 | 107  | Tajikistan .....          | 4.2   |   |           |   | 2.2 |
| 46   | Norway .....                 | 5.3   |   |           |   | 1.8 | 108  | Trinidad and Tobago ..... | 4.1   |   |           |   | 1.9 |
| 46   | Qatar .....                  | 5.3   |   |           |   | 1.5 | 109  | El Salvador .....         | 3.8   |   |           |   | 1.6 |
| 48   | Mali .....                   | 5.3   |   |           |   | 2.0 | 110  | United States .....       | 3.8   |   |           |   | 1.7 |
| 49   | Ireland .....                | 5.3   |   |           |   | 2.0 | 111  | Burundi .....             | 3.8   |   |           |   | 2.4 |
| 50   | Latvia .....                 | 5.3   |   |           |   | 2.0 | 112  | United Kingdom .....      | 3.8   |   |           |   | 1.7 |
| 51   | Mexico .....                 | 5.3   |   |           |   | 1.7 | 113  | Bangladesh .....          | 3.8   |   |           |   | 1.9 |
| 52   | Taiwan, China .....          | 5.3   |   |           |   | 2.1 | 114  | Algeria .....             | 3.7   |   |           |   | 2.2 |
| 53   | Tanzania .....               | 5.3   |   |           |   | 1.7 | 115  | Nigeria .....             | 3.7   |   |           |   | 2.0 |
| 54   | Mozambique .....             | 5.2   |   |           |   | 1.7 | 116  | Guyana .....              | 3.6   |   |           |   | 1.9 |
| 55   | Burkina Faso .....           | 5.2   |   |           |   | 1.8 | 117  | Kenya .....               | 3.6   |   |           |   | 2.0 |
| 56   | Malawi .....                 | 5.2   |   |           |   | 2.1 | 118  | Philippines .....         | 3.5   |   |           |   | 1.6 |
| 57   | Ethiopia .....               | 5.2   |   |           |   | 1.7 | 119  | Uganda .....              | 3.4   |   |           |   | 2.1 |
| 58   | Ecuador .....                | 5.2   |   |           |   | 1.7 | 120  | Israel .....              | 3.2   |   |           |   | 1.4 |
| 59   | Lesotho .....                | 5.2   |   |           |   | 1.9 | 121  | Pakistan .....            | 3.1   |   |           |   | 1.4 |
| 60   | Romania .....                | 5.2   |   |           |   | 2.0 | 122  | Colombia .....            | 3.0   |   |           |   | 1.5 |
| 61   | Vietnam .....                | 5.2   |   |           |   | 2.0 | 123  | Sri Lanka .....           | 2.6   |   |           |   | 1.7 |
| 62   | Bolivia .....                | 5.2   |   |           |   | 1.9 | 124  | Nepal .....               | 1.7   |   |           |   | 1.0 |

SOURCE: World Economic Forum, Executive Opinion Survey 2006



### 3.02 Reliability of police services

Police services (1 = cannot be relied upon to protect businesses from criminals, 7 = can be relied upon to protect businesses from criminals)

| RANK | COUNTRY/ECONOMY            | SCORE | 1 | MEAN: 4.2 | 7 | SD  | RANK | COUNTRY/ECONOMY              | SCORE | 1 | MEAN: 4.2 | 7 | SD  |
|------|----------------------------|-------|---|-----------|---|-----|------|------------------------------|-------|---|-----------|---|-----|
| 1    | Finland .....              | 6.6   |   |           |   | 0.7 | 63   | Suriname .....               | 4.1   |   |           |   | 1.7 |
| 2    | Germany .....              | 6.5   |   |           |   | 0.6 | 64   | China .....                  | 4.0   |   |           |   | 1.5 |
| 3    | Denmark .....              | 6.5   |   |           |   | 1.0 | 65   | Costa Rica .....             | 4.0   |   |           |   | 1.5 |
| 3    | Singapore .....            | 6.5   |   |           |   | 0.6 | 66   | Burkina Faso .....           | 4.0   |   |           |   | 1.7 |
| 5    | Switzerland .....          | 6.4   |   |           |   | 0.9 | 67   | Zambia .....                 | 4.0   |   |           |   | 1.7 |
| 6    | Iceland .....              | 6.3   |   |           |   | 1.2 | 68   | Albania .....                | 3.9   |   |           |   | 1.6 |
| 7    | Norway .....               | 6.2   |   |           |   | 0.9 | 69   | Poland .....                 | 3.9   |   |           |   | 1.0 |
| 8    | Austria .....              | 6.2   |   |           |   | 0.9 | 70   | Uruguay .....                | 3.9   |   |           |   | 1.5 |
| 9    | Hong Kong SAR .....        | 6.2   |   |           |   | 1.1 | 71   | Gambia .....                 | 3.8   |   |           |   | 1.8 |
| 10   | Jordan .....               | 6.0   |   |           |   | 1.2 | 72   | Macedonia, FYR .....         | 3.8   |   |           |   | 1.7 |
| 11   | United Arab Emirates ..... | 5.9   |   |           |   | 1.3 | 73   | Czech Republic .....         | 3.8   |   |           |   | 1.4 |
| 12   | Australia .....            | 5.8   |   |           |   | 1.0 | 74   | Armenia .....                | 3.8   |   |           |   | 1.9 |
| 13   | Netherlands .....          | 5.8   |   |           |   | 1.2 | 75   | Kazakhstan .....             | 3.7   |   |           |   | 1.7 |
| 14   | Canada .....               | 5.8   |   |           |   | 1.3 | 76   | Lithuania .....              | 3.7   |   |           |   | 1.5 |
| 15   | Luxembourg .....           | 5.7   |   |           |   | 1.2 | 77   | Croatia .....                | 3.7   |   |           |   | 1.5 |
| 16   | United States .....        | 5.7   |   |           |   | 1.4 | 78   | Serbia and Montenegro .....  | 3.7   |   |           |   | 1.7 |
| 17   | Japan .....                | 5.7   |   |           |   | 1.2 | 79   | Romania .....                | 3.7   |   |           |   | 1.8 |
| 18   | France .....               | 5.6   |   |           |   | 1.4 | 80   | El Salvador .....            | 3.6   |   |           |   | 1.3 |
| 19   | Malaysia .....             | 5.5   |   |           |   | 1.1 | 81   | Malawi .....                 | 3.6   |   |           |   | 1.6 |
| 19   | United Kingdom .....       | 5.5   |   |           |   | 1.5 | 82   | Tanzania .....               | 3.5   |   |           |   | 1.9 |
| 21   | Qatar .....                | 5.5   |   |           |   | 1.6 | 83   | Madagascar .....             | 3.5   |   |           |   | 1.5 |
| 22   | Spain .....                | 5.5   |   |           |   | 1.4 | 84   | Philippines .....            | 3.5   |   |           |   | 1.4 |
| 23   | New Zealand .....          | 5.5   |   |           |   | 1.4 | 85   | Pakistan .....               | 3.5   |   |           |   | 1.6 |
| 24   | Tunisia .....              | 5.5   |   |           |   | 1.3 | 86   | Uganda .....                 | 3.4   |   |           |   | 1.9 |
| 25   | Portugal .....             | 5.5   |   |           |   | 1.0 | 87   | Ukraine .....                | 3.4   |   |           |   | 1.6 |
| 26   | Kuwait .....               | 5.4   |   |           |   | 1.4 | 88   | South Africa .....           | 3.3   |   |           |   | 1.5 |
| 27   | Sweden .....               | 5.4   |   |           |   | 1.5 | 89   | Benin .....                  | 3.3   |   |           |   | 1.8 |
| 28   | Barbados .....             | 5.3   |   |           |   | 1.1 | 90   | Kenya .....                  | 3.3   |   |           |   | 1.8 |
| 29   | Ireland .....              | 5.3   |   |           |   | 1.4 | 91   | Angola .....                 | 3.3   |   |           |   | 1.5 |
| 30   | Malta .....                | 5.3   |   |           |   | 1.3 | 92   | Cameroon .....               | 3.3   |   |           |   | 1.8 |
| 31   | Chile .....                | 5.2   |   |           |   | 1.4 | 93   | Sri Lanka .....              | 3.3   |   |           |   | 1.6 |
| 32   | Belgium .....              | 5.2   |   |           |   | 1.4 | 94   | Lesotho .....                | 3.2   |   |           |   | 1.6 |
| 33   | Algeria .....              | 5.1   |   |           |   | 1.5 | 95   | Peru .....                   | 3.2   |   |           |   | 1.4 |
| 34   | Greece .....               | 5.0   |   |           |   | 1.3 | 96   | Burundi .....                | 3.2   |   |           |   | 1.8 |
| 35   | Morocco .....              | 5.0   |   |           |   | 1.7 | 97   | Namibia .....                | 3.2   |   |           |   | 1.7 |
| 36   | Taiwan, China .....        | 5.0   |   |           |   | 1.4 | 98   | Moldova .....                | 3.2   |   |           |   | 1.6 |
| 37   | Cyprus .....               | 4.9   |   |           |   | 1.4 | 99   | Indonesia .....              | 3.1   |   |           |   | 0.8 |
| 38   | Estonia .....              | 4.9   |   |           |   | 1.5 | 100  | Cambodia .....               | 3.1   |   |           |   | 1.6 |
| 39   | Korea, Rep. ....           | 4.9   |   |           |   | 1.4 | 101  | Nepal .....                  | 3.1   |   |           |   | 1.7 |
| 40   | Italy .....                | 4.9   |   |           |   | 1.5 | 102  | Honduras .....               | 3.1   |   |           |   | 1.5 |
| 41   | Thailand .....             | 4.8   |   |           |   | 1.3 | 103  | Dominican Republic .....     | 3.1   |   |           |   | 1.3 |
| 42   | Israel .....               | 4.6   |   |           |   | 1.5 | 104  | Mexico .....                 | 3.0   |   |           |   | 1.4 |
| 43   | Hungary .....              | 4.6   |   |           |   | 1.6 | 105  | Russian Federation .....     | 3.0   |   |           |   | 1.6 |
| 44   | Panama .....               | 4.6   |   |           |   | 1.5 | 106  | Mongolia .....               | 2.9   |   |           |   | 1.6 |
| 45   | Egypt .....                | 4.5   |   |           |   | 1.8 | 107  | Brazil .....                 | 2.9   |   |           |   | 1.5 |
| 46   | Vietnam .....              | 4.5   |   |           |   | 1.5 | 108  | Argentina .....              | 2.9   |   |           |   | 1.2 |
| 47   | Turkey .....               | 4.5   |   |           |   | 1.4 | 109  | Mozambique .....             | 2.8   |   |           |   | 1.5 |
| 48   | India .....                | 4.5   |   |           |   | 1.5 | 110  | Ecuador .....                | 2.8   |   |           |   | 1.5 |
| 49   | Slovak Republic .....      | 4.5   |   |           |   | 1.3 | 111  | Paraguay .....               | 2.8   |   |           |   | 1.5 |
| 50   | Azerbaijan .....           | 4.4   |   |           |   | 1.9 | 112  | Zimbabwe .....               | 2.8   |   |           |   | 1.5 |
| 51   | Slovenia .....             | 4.4   |   |           |   | 1.7 | 113  | Jamaica .....                | 2.8   |   |           |   | 1.3 |
| 52   | Georgia .....              | 4.4   |   |           |   | 1.5 | 114  | Guatemala .....              | 2.8   |   |           |   | 1.3 |
| 53   | Colombia .....             | 4.4   |   |           |   | 1.4 | 115  | Nigeria .....                | 2.7   |   |           |   | 1.7 |
| 54   | Bahrain .....              | 4.4   |   |           |   | 2.0 | 116  | Bulgaria .....               | 2.7   |   |           |   | 1.4 |
| 55   | Latvia .....               | 4.3   |   |           |   | 1.5 | 117  | Bosnia and Herzegovina ..... | 2.7   |   |           |   | 1.7 |
| 56   | Mauritius .....            | 4.3   |   |           |   | 1.3 | 118  | Bangladesh .....             | 2.4   |   |           |   | 1.3 |
| 57   | Mali .....                 | 4.3   |   |           |   | 1.9 | 119  | Chad .....                   | 2.3   |   |           |   | 1.5 |
| 58   | Nicaragua .....            | 4.3   |   |           |   | 1.8 | 120  | Bolivia .....                | 2.3   |   |           |   | 1.1 |
| 59   | Tajikistan .....           | 4.2   |   |           |   | 2.2 | 121  | Kyrgyz Republic .....        | 2.3   |   |           |   | 1.4 |
| 60   | Ethiopia .....             | 4.2   |   |           |   | 1.6 | 122  | Trinidad and Tobago .....    | 2.2   |   |           |   | 1.5 |
| 61   | Mauritania .....           | 4.2   |   |           |   | 1.7 | 123  | Venezuela .....              | 2.1   |   |           |   | 1.2 |
| 62   | Botswana .....             | 4.1   |   |           |   | 1.6 | 124  | Guyana .....                 | 1.9   |   |           |   | 1.0 |

SOURCE: World Economic Forum, Executive Opinion Survey 2006

### 3.03 Business costs of crime and violence

The incidence of common crime and violence (e.g., street muggings, firms being looted) (1 = imposes significant costs on businesses, 7 = does not impose significant costs on businesses)

| RANK | COUNTRY/ECONOMY             | SCORE | 1 | MEAN: 4.3 | 7 | SD  | RANK | COUNTRY/ECONOMY              | SCORE | 1 | MEAN: 4.3 | 7 | SD  |
|------|-----------------------------|-------|---|-----------|---|-----|------|------------------------------|-------|---|-----------|---|-----|
| 1    | Iceland .....               | 6.8   |   |           |   | 0.4 | 63   | Croatia .....                | 4.3   |   |           |   | 1.7 |
| 2    | Finland .....               | 6.7   |   |           |   | 0.7 | 64   | Philippines .....            | 4.2   |   |           |   | 1.6 |
| 3    | Germany .....               | 6.6   |   |           |   | 0.7 | 65   | Burkina Faso .....           | 4.2   |   |           |   | 1.5 |
| 4    | Singapore .....             | 6.6   |   |           |   | 0.7 | 66   | Botswana .....               | 4.1   |   |           |   | 1.7 |
| 5    | Denmark .....               | 6.5   |   |           |   | 0.8 | 67   | Kazakhstan .....             | 4.1   |   |           |   | 1.7 |
| 6    | Austria .....               | 6.4   |   |           |   | 0.9 | 68   | Panama .....                 | 4.1   |   |           |   | 1.8 |
| 7    | Switzerland .....           | 6.4   |   |           |   | 1.0 | 69   | Ukraine .....                | 4.0   |   |           |   | 1.7 |
| 8    | Hong Kong SAR .....         | 6.4   |   |           |   | 1.0 | 70   | China .....                  | 4.0   |   |           |   | 1.7 |
| 9    | Norway .....                | 6.4   |   |           |   | 0.8 | 71   | Moldova .....                | 3.9   |   |           |   | 1.8 |
| 10   | Jordan .....                | 6.2   |   |           |   | 0.8 | 72   | Romania .....                | 3.9   |   |           |   | 1.7 |
| 11   | United Arab Emirates .....  | 6.2   |   |           |   | 1.5 | 73   | Tajikistan .....             | 3.9   |   |           |   | 2.0 |
| 12   | Japan .....                 | 6.1   |   |           |   | 1.2 | 74   | Sri Lanka .....              | 3.9   |   |           |   | 1.7 |
| 13   | Qatar .....                 | 6.0   |   |           |   | 1.4 | 75   | Mongolia .....               | 3.8   |   |           |   | 1.8 |
| 14   | Malta .....                 | 6.0   |   |           |   | 1.0 | 76   | Pakistan .....               | 3.8   |   |           |   | 1.4 |
| 15   | Portugal .....              | 6.0   |   |           |   | 1.0 | 77   | Albania .....                | 3.8   |   |           |   | 2.0 |
| 16   | Greece .....                | 5.9   |   |           |   | 1.0 | 78   | Nicaragua .....              | 3.8   |   |           |   | 1.7 |
| 17   | New Zealand .....           | 5.8   |   |           |   | 1.4 | 79   | Mali .....                   | 3.8   |   |           |   | 2.2 |
| 18   | Sweden .....                | 5.8   |   |           |   | 1.1 | 80   | Algeria .....                | 3.8   |   |           |   | 2.0 |
| 19   | Australia .....             | 5.7   |   |           |   | 1.3 | 81   | Bosnia and Herzegovina ..... | 3.7   |   |           |   | 1.9 |
| 20   | Kuwait .....                | 5.6   |   |           |   | 1.6 | 82   | Russian Federation .....     | 3.7   |   |           |   | 1.7 |
| 21   | Tunisia .....               | 5.6   |   |           |   | 1.4 | 83   | Uruguay .....                | 3.6   |   |           |   | 1.5 |
| 22   | Luxembourg .....            | 5.6   |   |           |   | 1.5 | 84   | Namibia .....                | 3.6   |   |           |   | 1.8 |
| 23   | Slovak Republic .....       | 5.6   |   |           |   | 1.2 | 85   | Uganda .....                 | 3.6   |   |           |   | 1.9 |
| 24   | India .....                 | 5.6   |   |           |   | 1.5 | 86   | Tanzania .....               | 3.5   |   |           |   | 2.0 |
| 25   | Cyprus .....                | 5.5   |   |           |   | 1.5 | 87   | Malawi .....                 | 3.5   |   |           |   | 1.7 |
| 26   | Azerbaijan .....            | 5.5   |   |           |   | 1.6 | 88   | Benin .....                  | 3.4   |   |           |   | 1.8 |
| 27   | Slovenia .....              | 5.5   |   |           |   | 1.4 | 89   | Nepal .....                  | 3.4   |   |           |   | 1.7 |
| 28   | Indonesia .....             | 5.4   |   |           |   | 1.1 | 90   | Burundi .....                | 3.4   |   |           |   | 1.8 |
| 29   | Canada .....                | 5.4   |   |           |   | 1.6 | 91   | Cambodia .....               | 3.3   |   |           |   | 1.6 |
| 30   | Taiwan, China .....         | 5.4   |   |           |   | 1.4 | 92   | Zimbabwe .....               | 3.3   |   |           |   | 1.7 |
| 31   | United Kingdom .....        | 5.3   |   |           |   | 1.4 | 93   | Costa Rica .....             | 3.2   |   |           |   | 1.5 |
| 32   | Malaysia .....              | 5.3   |   |           |   | 1.6 | 94   | Suriname .....               | 3.2   |   |           |   | 1.8 |
| 33   | Estonia .....               | 5.3   |   |           |   | 1.6 | 95   | Macedonia, FYR .....         | 3.2   |   |           |   | 1.6 |
| 34   | Hungary .....               | 5.2   |   |           |   | 1.4 | 96   | Bolivia .....                | 3.2   |   |           |   | 1.6 |
| 35   | Netherlands .....           | 5.2   |   |           |   | 1.4 | 97   | Bulgaria .....               | 3.2   |   |           |   | 1.7 |
| 36   | Israel .....                | 5.2   |   |           |   | 1.5 | 98   | Bangladesh .....             | 3.1   |   |           |   | 1.5 |
| 37   | Armenia .....               | 5.2   |   |           |   | 1.7 | 99   | Dominican Republic .....     | 3.1   |   |           |   | 1.5 |
| 38   | Belgium .....               | 5.1   |   |           |   | 1.5 | 100  | Cameroon .....               | 3.1   |   |           |   | 1.7 |
| 39   | Latvia .....                | 5.1   |   |           |   | 1.5 | 101  | Colombia .....               | 3.0   |   |           |   | 1.3 |
| 40   | Thailand .....              | 5.0   |   |           |   | 1.4 | 102  | Lesotho .....                | 3.0   |   |           |   | 1.6 |
| 41   | Ireland .....               | 5.0   |   |           |   | 1.5 | 103  | Kyrgyz Republic .....        | 3.0   |   |           |   | 1.5 |
| 42   | United States .....         | 5.0   |   |           |   | 1.6 | 104  | Zambia .....                 | 3.0   |   |           |   | 1.4 |
| 43   | Barbados .....              | 5.0   |   |           |   | 1.5 | 105  | Argentina .....              | 2.9   |   |           |   | 1.2 |
| 44   | Morocco .....               | 5.0   |   |           |   | 1.8 | 106  | Nigeria .....                | 2.9   |   |           |   | 1.8 |
| 45   | France .....                | 5.0   |   |           |   | 1.6 | 107  | Madagascar .....             | 2.8   |   |           |   | 1.3 |
| 46   | Korea, Rep. ....            | 4.9   |   |           |   | 1.5 | 108  | Paraguay .....               | 2.8   |   |           |   | 1.5 |
| 47   | Bahrain .....               | 4.9   |   |           |   | 1.7 | 109  | Mozambique .....             | 2.7   |   |           |   | 1.4 |
| 48   | Egypt .....                 | 4.8   |   |           |   | 1.8 | 110  | Ecuador .....                | 2.7   |   |           |   | 1.3 |
| 49   | Czech Republic .....        | 4.8   |   |           |   | 1.6 | 111  | Brazil .....                 | 2.7   |   |           |   | 1.6 |
| 50   | Gambia .....                | 4.8   |   |           |   | 1.7 | 112  | South Africa .....           | 2.6   |   |           |   | 1.5 |
| 51   | Turkey .....                | 4.7   |   |           |   | 1.6 | 113  | Peru .....                   | 2.6   |   |           |   | 1.3 |
| 52   | Mauritius .....             | 4.7   |   |           |   | 1.5 | 114  | Kenya .....                  | 2.5   |   |           |   | 1.5 |
| 52   | Spain .....                 | 4.7   |   |           |   | 1.7 | 115  | Angola .....                 | 2.4   |   |           |   | 1.1 |
| 54   | Georgia .....               | 4.6   |   |           |   | 1.4 | 116  | Mexico .....                 | 2.4   |   |           |   | 1.2 |
| 55   | Chile .....                 | 4.6   |   |           |   | 1.7 | 117  | Trinidad and Tobago .....    | 2.3   |   |           |   | 1.7 |
| 56   | Vietnam .....               | 4.6   |   |           |   | 1.7 | 118  | Chad .....                   | 2.3   |   |           |   | 1.6 |
| 57   | Serbia and Montenegro ..... | 4.6   |   |           |   | 2.0 | 119  | Honduras .....               | 2.1   |   |           |   | 1.2 |
| 58   | Mauritania .....            | 4.5   |   |           |   | 1.6 | 120  | Jamaica .....                | 2.1   |   |           |   | 1.2 |
| 59   | Lithuania .....             | 4.5   |   |           |   | 1.6 | 121  | Guatemala .....              | 2.0   |   |           |   | 1.0 |
| 60   | Italy .....                 | 4.4   |   |           |   | 1.8 | 122  | El Salvador .....            | 1.9   |   |           |   | 0.9 |
| 61   | Ethiopia .....              | 4.4   |   |           |   | 1.9 | 123  | Venezuela .....              | 1.8   |   |           |   | 1.1 |
| 62   | Poland .....                | 4.3   |   |           |   | 1.1 | 124  | Guyana .....                 | 1.7   |   |           |   | 0.9 |

SOURCE: World Economic Forum, Executive Opinion Survey 2006

## Pillar 4

# Health and hygiene

## 4.01 Government efforts to reduce health risks from pandemics

Do you believe that your government is taking the right steps to minimize the health risks and disruptions to business/travel potentially caused by pandemics? (1 = no, the government is taking no steps, 7 = yes, the government is undertaking all possible measures)

| RANK | COUNTRY/ECONOMY      | SCORE | 1 | MEAN: 4.4 | 7 | SD  | RANK | COUNTRY/ECONOMY        | SCORE | 1 | MEAN: 4.4 | 7 | SD  |
|------|----------------------|-------|---|-----------|---|-----|------|------------------------|-------|---|-----------|---|-----|
| 1    | Singapore            | 6.2   |   |           |   | 0.7 | 63   | Kazakhstan             | 4.3   |   |           |   | 1.4 |
| 2    | Finland              | 6.1   |   |           |   | 1.0 | 64   | Spain                  | 4.3   |   |           |   | 1.6 |
| 3    | Tunisia              | 6.0   |   |           |   | 0.9 | 65   | Benin                  | 4.3   |   |           |   | 1.7 |
| 4    | Hong Kong SAR        | 5.9   |   |           |   | 0.9 | 66   | Colombia               | 4.3   |   |           |   | 1.4 |
| 5    | Iceland              | 5.9   |   |           |   | 1.0 | 67   | Costa Rica             | 4.2   |   |           |   | 1.3 |
| 6    | Norway               | 5.8   |   |           |   | 0.8 | 68   | Lithuania              | 4.2   |   |           |   | 1.3 |
| 7    | Hungary              | 5.7   |   |           |   | 1.0 | 69   | El Salvador            | 4.2   |   |           |   | 1.4 |
| 8    | Malaysia             | 5.7   |   |           |   | 1.1 | 70   | Mauritania             | 4.2   |   |           |   | 1.6 |
| 9    | United Arab Emirates | 5.7   |   |           |   | 1.2 | 71   | Kenya                  | 4.1   |   |           |   | 1.8 |
| 10   | Denmark              | 5.7   |   |           |   | 1.1 | 72   | India                  | 4.1   |   |           |   | 1.5 |
| 11   | Kuwait               | 5.7   |   |           |   | 1.4 | 73   | Malawi                 | 4.1   |   |           |   | 1.7 |
| 12   | France               | 5.6   |   |           |   | 1.3 | 74   | Mozambique             | 4.1   |   |           |   | 1.5 |
| 13   | Qatar                | 5.6   |   |           |   | 1.2 | 75   | Latvia                 | 4.1   |   |           |   | 1.5 |
| 14   | Japan                | 5.5   |   |           |   | 1.3 | 76   | Cambodia               | 4.1   |   |           |   | 1.6 |
| 15   | Vietnam              | 5.5   |   |           |   | 1.3 | 77   | Mongolia               | 4.1   |   |           |   | 1.8 |
| 16   | New Zealand          | 5.4   |   |           |   | 1.0 | 78   | Serbia and Montenegro  | 4.1   |   |           |   | 1.5 |
| 17   | Netherlands          | 5.4   |   |           |   | 1.2 | 79   | Jamaica                | 4.1   |   |           |   | 1.5 |
| 18   | Germany              | 5.4   |   |           |   | 1.2 | 80   | Ireland                | 4.0   |   |           |   | 1.5 |
| 19   | Sweden               | 5.4   |   |           |   | 1.4 | 81   | Panama                 | 4.0   |   |           |   | 1.5 |
| 20   | Switzerland          | 5.4   |   |           |   | 1.3 | 82   | Philippines            | 4.0   |   |           |   | 1.7 |
| 21   | Belgium              | 5.3   |   |           |   | 1.2 | 83   | Georgia                | 4.0   |   |           |   | 1.5 |
| 22   | Australia            | 5.3   |   |           |   | 1.0 | 84   | Guyana                 | 3.9   |   |           |   | 1.5 |
| 23   | Luxembourg           | 5.3   |   |           |   | 1.4 | 85   | Pakistan               | 3.9   |   |           |   | 1.4 |
| 24   | China                | 5.3   |   |           |   | 1.2 | 86   | Madagascar             | 3.9   |   |           |   | 1.6 |
| 25   | Greece               | 5.3   |   |           |   | 1.4 | 87   | Poland                 | 3.9   |   |           |   | 1.1 |
| 26   | Malta                | 5.2   |   |           |   | 1.4 | 88   | Cameroon               | 3.7   |   |           |   | 1.6 |
| 27   | Taiwan, China        | 5.2   |   |           |   | 1.4 | 89   | Azerbaijan             | 3.7   |   |           |   | 1.6 |
| 28   | Austria              | 5.2   |   |           |   | 1.4 | 90   | Armenia                | 3.7   |   |           |   | 1.7 |
| 29   | Israel               | 5.1   |   |           |   | 1.3 | 91   | Macedonia, FYR         | 3.7   |   |           |   | 1.5 |
| 30   | Jordan               | 5.1   |   |           |   | 1.3 | 92   | Ethiopia               | 3.7   |   |           |   | 1.6 |
| 31   | Barbados             | 5.1   |   |           |   | 1.3 | 92   | Lesotho                | 3.7   |   |           |   | 1.8 |
| 32   | Italy                | 5.0   |   |           |   | 1.4 | 94   | Angola                 | 3.7   |   |           |   | 1.5 |
| 33   | Botswana             | 5.0   |   |           |   | 1.6 | 95   | Brazil                 | 3.6   |   |           |   | 1.7 |
| 34   | Thailand             | 5.0   |   |           |   | 1.3 | 96   | Moldova                | 3.6   |   |           |   | 1.5 |
| 35   | Czech Republic       | 5.0   |   |           |   | 1.3 | 97   | Romania                | 3.6   |   |           |   | 1.5 |
| 36   | Portugal             | 4.9   |   |           |   | 1.4 | 98   | Guatemala              | 3.6   |   |           |   | 1.4 |
| 37   | Croatia              | 4.9   |   |           |   | 1.5 | 99   | Namibia                | 3.6   |   |           |   | 1.4 |
| 38   | Mali                 | 4.9   |   |           |   | 1.8 | 100  | Indonesia              | 3.5   |   |           |   | 1.0 |
| 39   | Korea, Rep.          | 4.9   |   |           |   | 1.3 | 101  | South Africa           | 3.5   |   |           |   | 1.4 |
| 40   | Bahrain              | 4.9   |   |           |   | 1.6 | 102  | Bulgaria               | 3.5   |   |           |   | 1.6 |
| 41   | Canada               | 4.8   |   |           |   | 1.3 | 103  | Ukraine                | 3.5   |   |           |   | 1.5 |
| 42   | Morocco              | 4.8   |   |           |   | 1.6 | 104  | Albania                | 3.5   |   |           |   | 1.7 |
| 43   | Slovenia             | 4.8   |   |           |   | 1.3 | 105  | Honduras               | 3.4   |   |           |   | 1.4 |
| 44   | Tanzania             | 4.7   |   |           |   | 1.4 | 106  | Trinidad and Tobago    | 3.4   |   |           |   | 1.8 |
| 45   | Mexico               | 4.7   |   |           |   | 1.3 | 107  | Suriname               | 3.4   |   |           |   | 1.5 |
| 46   | United Kingdom       | 4.7   |   |           |   | 1.5 | 108  | Russian Federation     | 3.4   |   |           |   | 1.7 |
| 47   | Slovak Republic      | 4.7   |   |           |   | 1.3 | 109  | Burundi                | 3.3   |   |           |   | 1.9 |
| 48   | Algeria              | 4.7   |   |           |   | 1.7 | 110  | Peru                   | 3.2   |   |           |   | 1.0 |
| 49   | Burkina Faso         | 4.7   |   |           |   | 1.5 | 111  | Bosnia and Herzegovina | 3.2   |   |           |   | 1.5 |
| 50   | Mauritius            | 4.7   |   |           |   | 1.3 | 111  | Nicaragua              | 3.2   |   |           |   | 1.4 |
| 51   | Cyprus               | 4.6   |   |           |   | 1.6 | 113  | Kyrgyz Republic        | 3.1   |   |           |   | 1.5 |
| 52   | Uganda               | 4.6   |   |           |   | 1.8 | 114  | Argentina              | 3.1   |   |           |   | 1.5 |
| 53   | Chile                | 4.6   |   |           |   | 1.4 | 115  | Chad                   | 3.1   |   |           |   | 1.8 |
| 54   | Nigeria              | 4.5   |   |           |   | 1.8 | 116  | Bangladesh             | 3.0   |   |           |   | 1.5 |
| 55   | Sri Lanka            | 4.5   |   |           |   | 1.6 | 117  | Bolivia                | 3.0   |   |           |   | 1.4 |
| 55   | Tajikistan           | 4.5   |   |           |   | 1.7 | 118  | Zimbabwe               | 2.8   |   |           |   | 1.5 |
| 57   | Gambia               | 4.5   |   |           |   | 1.6 | 119  | Nepal                  | 2.7   |   |           |   | 1.6 |
| 58   | Estonia              | 4.5   |   |           |   | 1.3 | 120  | Zambia                 | 2.6   |   |           |   | 1.4 |
| 59   | Egypt                | 4.5   |   |           |   | 1.7 | 121  | Venezuela              | 2.6   |   |           |   | 1.4 |
| 60   | United States        | 4.5   |   |           |   | 1.5 | 122  | Paraguay               | 2.6   |   |           |   | 1.3 |
| 61   | Uruguay              | 4.5   |   |           |   | 1.5 | 123  | Dominican Republic     | 2.5   |   |           |   | 1.3 |
| 62   | Turkey               | 4.4   |   |           |   | 1.5 | 124  | Ecuador                | 2.4   |   |           |   | 1.2 |

SOURCE: World Economic Forum, Executive Opinion Survey 2006

## 4.02 Physician density

Physician density per 1,000 population, 2004 or most recent year available

| RANK | COUNTRY/ECONOMY       | HARD DATA | RANK | COUNTRY/ECONOMY        | HARD DATA |
|------|-----------------------|-----------|------|------------------------|-----------|
| 1    | Belgium               | 4.5       | 63   | Singapore              | 1.4       |
| 2    | Estonia               | 4.5       | 64   | Colombia               | 1.4       |
| 3    | Greece                | 4.4       | 64   | Turkey                 | 1.4       |
| 4    | Russian Federation    | 4.3       | 66   | Bosnia and Herzegovina | 1.3       |
| 5    | Italy                 | 4.2       | 66   | Tunisia                | 1.3       |
| 6    | Georgia               | 4.1       | 68   | Costa Rica             | 1.3       |
| 7    | Lithuania             | 4.0       | 69   | Albania                | 1.3       |
| 8    | Israel                | 3.8       | 70   | El Salvador            | 1.2       |
| 9    | Uruguay               | 3.7       | 71   | Bolivia                | 1.2       |
| 10   | Iceland               | 3.6       | 72   | Barbados               | 1.2       |
| 11   | Switzerland           | 3.6       | 73   | Peru                   | 1.2       |
| 12   | Armenia               | 3.6       | 74   | Brazil                 | 1.2       |
| 13   | Bulgaria              | 3.6       | 75   | Algeria                | 1.1       |
| 14   | Azerbaijan            | 3.6       | 76   | Paraguay               | 1.1       |
| 15   | Kazakhstan            | 3.5       | 77   | Bahrain                | 1.1       |
| 16   | Czech Republic        | 3.5       | 77   | Chile                  | 1.1       |
| 17   | Portugal              | 3.4       | 79   | China                  | 1.1       |
| 18   | Austria               | 3.4       | 79   | Mauritius              | 1.1       |
| 19   | France                | 3.4       | 81   | Guatemala              | 0.9       |
| 19   | Germany               | 3.4       | 82   | Jamaica                | 0.9       |
| 21   | Hungary               | 3.3       | 83   | Trinidad and Tobago    | 0.8       |
| 22   | Spain                 | 3.3       | 84   | South Africa           | 0.8       |
| 23   | Sweden                | 3.3       | 85   | Pakistan               | 0.7       |
| 24   | Malta                 | 3.2       | 86   | Malaysia               | 0.7       |
| 24   | Slovak Republic       | 3.2       | 87   | India                  | 0.6       |
| 26   | Finland               | 3.2       | 88   | Philippines            | 0.6       |
| 27   | Netherlands           | 3.2       | 89   | Honduras               | 0.6       |
| 28   | Norway                | 3.1       | 90   | Sri Lanka              | 0.6       |
| 29   | Argentina             | 3.0       | 91   | Egypt                  | 0.5       |
| 29   | Latvia                | 3.0       | 92   | Vietnam                | 0.5       |
| 31   | Ukraine               | 3.0       | 93   | Morocco                | 0.5       |
| 32   | Denmark               | 2.9       | 94   | Guyana                 | 0.5       |
| 33   | Ireland               | 2.8       | 95   | Suriname               | 0.5       |
| 34   | Luxembourg            | 2.7       | 96   | Botswana               | 0.4       |
| 35   | Moldova               | 2.6       | 97   | Nicaragua              | 0.4       |
| 36   | Mongolia              | 2.6       | 97   | Thailand               | 0.4       |
| 37   | United States         | 2.6       | 99   | Namibia                | 0.3       |
| 38   | Kyrgyz Republic       | 2.5       | 100  | Madagascar             | 0.3       |
| 39   | Australia             | 2.5       | 101  | Nigeria                | 0.3       |
| 39   | Poland                | 2.5       | 102  | Bangladesh             | 0.3       |
| 41   | Croatia               | 2.4       | 103  | Nepal                  | 0.2       |
| 42   | New Zealand           | 2.4       | 104  | Cameroon               | 0.2       |
| 43   | Cyprus                | 2.3       | 105  | Cambodia               | 0.2       |
| 44   | United Kingdom        | 2.3       | 105  | Zimbabwe               | 0.2       |
| 45   | Slovenia              | 2.3       | 107  | Kenya                  | 0.1       |
| 46   | Qatar                 | 2.2       | 108  | Indonesia              | 0.1       |
| 47   | Macedonia, FYR        | 2.2       | 109  | Zambia                 | 0.1       |
| 48   | Canada                | 2.1       | 110  | Gambia                 | 0.1       |
| 49   | Serbia and Montenegro | 2.1       | 110  | Mauritania             | 0.1       |
| 50   | Jordan                | 2.0       | 112  | Angola                 | 0.1       |
| 50   | Tajikistan            | 2.0       | 112  | Mali                   | 0.1       |
| 52   | United Arab Emirates  | 2.0       | 112  | Uganda                 | 0.1       |
| 53   | Japan                 | 2.0       | 115  | Burkina Faso           | 0.1       |
| 53   | Mexico                | 2.0       | 116  | Lesotho                | 0.1       |
| 55   | Venezuela             | 1.9       | 117  | Benin                  | 0.0       |
| 56   | Romania               | 1.9       | 117  | Chad                   | 0.0       |
| 57   | Dominican Republic    | 1.9       | 119  | Burundi                | 0.0       |
| 58   | Korea, Rep.           | 1.6       | 119  | Ethiopia               | 0.0       |
| 59   | Kuwait                | 1.5       | 119  | Mozambique             | 0.0       |
| 60   | Panama                | 1.5       | 122  | Malawi                 | 0.0       |
| 61   | Taiwan, China         | 1.5       | 122  | Tanzania               | 0.0       |
| 62   | Ecuador               | 1.5       | n/a  | Hong Kong SAR          | n/a       |

SOURCE: World Health Organization, *World Health Statistics 2006* and *The World Health Report 2006*

## 4.03 Access to improved sanitation

Access to adequate sanitation facilities as a percentage of total population

| RANK | COUNTRY/ECONOMY             | HARD DATA |             | RANK | COUNTRY/ECONOMY          | HARD DATA |             |
|------|-----------------------------|-----------|-------------|------|--------------------------|-----------|-------------|
| 1    | Australia.....              | 100.0     | <div></div> | 62   | Kazakhstan .....         | 72.0      | <div></div> |
| 1    | Austria .....               | 100.0     | <div></div> | 62   | Panama.....              | 72.0      | <div></div> |
| 1    | Bahrain .....               | 100.0     | <div></div> | 65   | Guyana .....             | 70.0      | <div></div> |
| 1    | Belgium .....               | 100.0     | <div></div> | 66   | Egypt .....              | 68.0      | <div></div> |
| 1    | Bulgaria.....               | 100.0     | <div></div> | 66   | Honduras.....            | 68.0      | <div></div> |
| 1    | Canada.....                 | 100.0     | <div></div> | 66   | Moldova.....             | 68.0      | <div></div> |
| 1    | Cyprus .....                | 100.0     | <div></div> | 66   | Venezuela .....          | 68.0      | <div></div> |
| 1    | Denmark.....                | 100.0     | <div></div> | 70   | South Africa.....        | 67.0      | <div></div> |
| 1    | Finland.....                | 100.0     | <div></div> | 71   | Nicaragua.....           | 66.0      | <div></div> |
| 1    | France.....                 | 100.0     | <div></div> | 72   | El Salvador.....         | 63.0      | <div></div> |
| 1    | Germany.....                | 100.0     | <div></div> | 73   | Peru.....                | 62.0      | <div></div> |
| 1    | Greece.....                 | 100.0     | <div></div> | 74   | Guatemala .....          | 61.0      | <div></div> |
| 1    | Hong Kong SAR .....         | 100.0     | <div></div> | 74   | Morocco .....            | 61.0      | <div></div> |
| 1    | Iceland.....                | 100.0     | <div></div> | 76   | Kyrgyz Republic.....     | 60.0      | <div></div> |
| 1    | Ireland.....                | 100.0     | <div></div> | 77   | Mongolia.....            | 59.0      | <div></div> |
| 1    | Israel.....                 | 100.0     | <div></div> | 78   | Dominican Republic ..... | 57.0      | <div></div> |
| 1    | Italy.....                  | 100.0     | <div></div> | 78   | Zimbabwe.....            | 57.0      | <div></div> |
| 1    | Japan .....                 | 100.0     | <div></div> | 80   | Azerbaijan .....         | 55.0      | <div></div> |
| 1    | Kuwait .....                | 100.0     | <div></div> | 81   | Pakistan .....           | 54.0      | <div></div> |
| 1    | Luxembourg .....            | 100.0     | <div></div> | 82   | Gambia .....             | 53.0      | <div></div> |
| 1    | Netherlands .....           | 100.0     | <div></div> | 82   | Tajikistan .....         | 53.0      | <div></div> |
| 1    | New Zealand .....           | 100.0     | <div></div> | 84   | Indonesia .....          | 52.0      | <div></div> |
| 1    | Norway.....                 | 100.0     | <div></div> | 85   | Romania.....             | 51.0      | <div></div> |
| 1    | Portugal .....              | 100.0     | <div></div> | 86   | Bangladesh.....          | 48.0      | <div></div> |
| 1    | Qatar.....                  | 100.0     | <div></div> | 86   | Cameroon.....            | 48.0      | <div></div> |
| 1    | Singapore .....             | 100.0     | <div></div> | 86   | Kenya.....               | 48.0      | <div></div> |
| 1    | Slovak Republic .....       | 100.0     | <div></div> | 89   | Malawi.....              | 46.0      | <div></div> |
| 1    | Slovenia.....               | 100.0     | <div></div> | 89   | Tanzania .....           | 46.0      | <div></div> |
| 1    | Spain.....                  | 100.0     | <div></div> | 91   | Bolivia.....             | 45.0      | <div></div> |
| 1    | Sweden .....                | 100.0     | <div></div> | 91   | Mali.....                | 45.0      | <div></div> |
| 1    | Switzerland.....            | 100.0     | <div></div> | 91   | Zambia.....              | 45.0      | <div></div> |
| 1    | Trinidad and Tobago.....    | 100.0     | <div></div> | 94   | China .....              | 44.0      | <div></div> |
| 1    | United Arab Emirates .....  | 100.0     | <div></div> | 95   | Mauritania.....          | 42.0      | <div></div> |
| 1    | United Kingdom .....        | 100.0     | <div></div> | 96   | Botswana .....           | 41.0      | <div></div> |
| 1    | United States .....         | 100.0     | <div></div> | 96   | Uganda .....             | 41.0      | <div></div> |
| 36   | Barbados .....              | 99.0      | <div></div> | 96   | Vietnam .....            | 41.0      | <div></div> |
| 36   | Mauritius .....             | 99.0      | <div></div> | 99   | Nigeria .....            | 38.0      | <div></div> |
| 36   | Thailand .....              | 99.0      | <div></div> | 100  | Lesotho .....            | 37.0      | <div></div> |
| 36   | Ukraine .....               | 99.0      | <div></div> | 101  | Burundi.....             | 36.0      | <div></div> |
| 40   | Hungary.....                | 95.0      | <div></div> | 102  | Madagascar .....         | 33.0      | <div></div> |
| 41   | Uruguay.....                | 94.0      | <div></div> | 103  | Benin .....              | 32.0      | <div></div> |
| 42   | Bosnia and Herzegovina..... | 93.0      | <div></div> | 104  | Angola .....             | 30.0      | <div></div> |
| 42   | Jordan.....                 | 93.0      | <div></div> | 104  | India.....               | 30.0      | <div></div> |
| 42   | Suriname .....              | 93.0      | <div></div> | 104  | Namibia .....            | 30.0      | <div></div> |
| 45   | Algeria .....               | 92.0      | <div></div> | 107  | Mozambique.....          | 27.0      | <div></div> |
| 45   | Chile .....                 | 92.0      | <div></div> | 107  | Nepal .....              | 27.0      | <div></div> |
| 45   | Costa Rica .....            | 92.0      | <div></div> | 109  | Cambodia .....           | 16.0      | <div></div> |
| 48   | Sri Lanka.....              | 91.0      | <div></div> | 110  | Burkina Faso.....        | 12.0      | <div></div> |
| 49   | Albania.....                | 89.0      | <div></div> | 111  | Chad .....               | 8.0       | <div></div> |
| 50   | Russian Federation.....     | 87.0      | <div></div> | 112  | Ethiopia.....            | 6.0       | <div></div> |
| 50   | Serbia and Montenegro.....  | 87.0      | <div></div> | n/a  | Argentina .....          | n/a       |             |
| 52   | Colombia .....              | 86.0      | <div></div> | n/a  | Croatia .....            | n/a       |             |
| 53   | Armenia.....                | 84.0      | <div></div> | n/a  | Czech Republic.....      | n/a       |             |
| 54   | Georgia.....                | 83.0      | <div></div> | n/a  | Estonia.....             | n/a       |             |
| 54   | Turkey .....                | 83.0      | <div></div> | n/a  | Korea, Rep.....          | n/a       |             |
| 56   | Jamaica .....               | 80.0      | <div></div> | n/a  | Latvia .....             | n/a       |             |
| 56   | Tunisia.....                | 80.0      | <div></div> | n/a  | Lithuania .....          | n/a       |             |
| 58   | Paraguay.....               | 78.0      | <div></div> | n/a  | Macedonia, FYR .....     | n/a       |             |
| 59   | Mexico.....                 | 77.0      | <div></div> | n/a  | Malaysia.....            | n/a       |             |
| 60   | Brazil.....                 | 75.0      | <div></div> | n/a  | Malta.....               | n/a       |             |
| 61   | Philippines .....           | 73.0      | <div></div> | n/a  | Poland.....              | n/a       |             |
| 62   | Ecuador .....               | 72.0      | <div></div> | n/a  | Taiwan, China .....      | n/a       |             |

SOURCE: World Bank, *World Development Indicators 2006* (published version)

## 4.04 Access to improved drinking water

Access to safe drinking water as a percentage of total population

| RANK | COUNTRY/ECONOMY             | HARD DATA |  | RANK | COUNTRY/ECONOMY      | HARD DATA |  |
|------|-----------------------------|-----------|--|------|----------------------|-----------|--|
| 1    | Australia.....              | 100.0     |  | 62   | Pakistan.....        | 90.0      |  |
| 1    | Austria.....                | 100.0     |  | 64   | Brazil.....          | 89.0      |  |
| 1    | Barbados.....               | 100.0     |  | 65   | Algeria.....         | 87.0      |  |
| 1    | Belgium.....                | 100.0     |  | 65   | South Africa.....    | 87.0      |  |
| 1    | Bulgaria.....               | 100.0     |  | 67   | Ecuador.....         | 86.0      |  |
| 1    | Canada.....                 | 100.0     |  | 67   | India.....           | 86.0      |  |
| 1    | Cyprus.....                 | 100.0     |  | 67   | Kazakhstan.....      | 86.0      |  |
| 1    | Denmark.....                | 100.0     |  | 70   | Bolivia.....         | 85.0      |  |
| 1    | Finland.....                | 100.0     |  | 70   | Philippines.....     | 85.0      |  |
| 1    | France.....                 | 100.0     |  | 70   | Thailand.....        | 85.0      |  |
| 1    | Germany.....                | 100.0     |  | 73   | Nepal.....           | 84.0      |  |
| 1    | Greece.....                 | 100.0     |  | 74   | Guyana.....          | 83.0      |  |
| 1    | Hong Kong SAR.....          | 100.0     |  | 74   | Paraguay.....        | 83.0      |  |
| 1    | Iceland.....                | 100.0     |  | 74   | Venezuela.....       | 83.0      |  |
| 1    | Ireland.....                | 100.0     |  | 74   | Zimbabwe.....        | 83.0      |  |
| 1    | Israel.....                 | 100.0     |  | 78   | El Salvador.....     | 82.0      |  |
| 1    | Italy.....                  | 100.0     |  | 78   | Gambia.....          | 82.0      |  |
| 1    | Japan.....                  | 100.0     |  | 78   | Tunisia.....         | 82.0      |  |
| 1    | Kuwait.....                 | 100.0     |  | 81   | Nicaragua.....       | 81.0      |  |
| 1    | Luxembourg.....             | 100.0     |  | 81   | Peru.....            | 81.0      |  |
| 1    | Malta.....                  | 100.0     |  | 83   | Morocco.....         | 80.0      |  |
| 1    | Mauritius.....              | 100.0     |  | 83   | Namibia.....         | 80.0      |  |
| 1    | Netherlands.....            | 100.0     |  | 83   | Vietnam.....         | 80.0      |  |
| 1    | New Zealand.....            | 100.0     |  | 86   | Burundi.....         | 79.0      |  |
| 1    | Norway.....                 | 100.0     |  | 87   | Indonesia.....       | 78.0      |  |
| 1    | Portugal.....               | 100.0     |  | 87   | Sri Lanka.....       | 78.0      |  |
| 1    | Qatar.....                  | 100.0     |  | 89   | Azerbaijan.....      | 77.0      |  |
| 1    | Singapore.....              | 100.0     |  | 89   | China.....           | 77.0      |  |
| 1    | Slovak Republic.....        | 100.0     |  | 91   | Georgia.....         | 76.0      |  |
| 1    | Slovenia.....               | 100.0     |  | 91   | Kyrgyz Republic..... | 76.0      |  |
| 1    | Spain.....                  | 100.0     |  | 91   | Lesotho.....         | 76.0      |  |
| 1    | Sweden.....                 | 100.0     |  | 94   | Bangladesh.....      | 75.0      |  |
| 1    | Switzerland.....            | 100.0     |  | 95   | Tanzania.....        | 73.0      |  |
| 1    | United Arab Emirates.....   | 100.0     |  | 96   | Benin.....           | 68.0      |  |
| 1    | United Kingdom.....         | 100.0     |  | 97   | Malawi.....          | 67.0      |  |
| 1    | United States.....          | 100.0     |  | 98   | Cameroon.....        | 63.0      |  |
| 37   | Hungary.....                | 99.0      |  | 99   | Kenya.....           | 62.0      |  |
| 38   | Bosnia and Herzegovina..... | 98.0      |  | 99   | Mongolia.....        | 62.0      |  |
| 38   | Egypt.....                  | 98.0      |  | 101  | Nigeria.....         | 60.0      |  |
| 38   | Ukraine.....                | 98.0      |  | 102  | Tajikistan.....      | 58.0      |  |
| 38   | Uruguay.....                | 98.0      |  | 103  | Romania.....         | 57.0      |  |
| 42   | Albania.....                | 97.0      |  | 104  | Mauritania.....      | 56.0      |  |
| 42   | Costa Rica.....             | 97.0      |  | 104  | Uganda.....          | 56.0      |  |
| 44   | Russian Federation.....     | 96.0      |  | 106  | Zambia.....          | 55.0      |  |
| 45   | Botswana.....               | 95.0      |  | 107  | Burkina Faso.....    | 51.0      |  |
| 45   | Chile.....                  | 95.0      |  | 108  | Angola.....          | 50.0      |  |
| 45   | Guatemala.....              | 95.0      |  | 109  | Mali.....            | 48.0      |  |
| 45   | Malaysia.....               | 95.0      |  | 110  | Madagascar.....      | 45.0      |  |
| 49   | Dominican Republic.....     | 93.0      |  | 111  | Mozambique.....      | 42.0      |  |
| 49   | Jamaica.....                | 93.0      |  | 112  | Cambodia.....        | 34.0      |  |
| 49   | Serbia and Montenegro.....  | 93.0      |  | 112  | Chad.....            | 34.0      |  |
| 49   | Turkey.....                 | 93.0      |  | 114  | Ethiopia.....        | 22.0      |  |
| 53   | Armenia.....                | 92.0      |  | n/a  | Argentina.....       | n/a       |  |
| 53   | Colombia.....               | 92.0      |  | n/a  | Bahrain.....         | n/a       |  |
| 53   | Korea, Rep.....             | 92.0      |  | n/a  | Croatia.....         | n/a       |  |
| 53   | Moldova.....                | 92.0      |  | n/a  | Czech Republic.....  | n/a       |  |
| 53   | Suriname.....               | 92.0      |  | n/a  | Estonia.....         | n/a       |  |
| 58   | Jordan.....                 | 91.0      |  | n/a  | Latvia.....          | n/a       |  |
| 58   | Mexico.....                 | 91.0      |  | n/a  | Lithuania.....       | n/a       |  |
| 58   | Panama.....                 | 91.0      |  | n/a  | Macedonia, FYR.....  | n/a       |  |
| 58   | Trinidad and Tobago.....    | 91.0      |  | n/a  | Poland.....          | n/a       |  |
| 62   | Honduras.....               | 90.0      |  | n/a  | Taiwan, China.....   | n/a       |  |

SOURCE: World Bank, *World Development Indicators 2005* (published version)





## Pillar 5

# Prioritization of Travel & Tourism

## 5.01 Government prioritization of the T&T industry

Is the T&T industry given due consideration/priority compared with other sectors when your government sets policy on investment and development? (1 = no, the T&T industry is not a priority for the government, 7 = yes, nurturing and developing T&T industry is a top priority for the government)

| RANK | COUNTRY/ECONOMY         | SCORE | 1 | MEAN: 4.5 | 7 | SD  | RANK | COUNTRY/ECONOMY             | SCORE | 1 | MEAN: 4.5 | 7 | SD  |
|------|-------------------------|-------|---|-----------|---|-----|------|-----------------------------|-------|---|-----------|---|-----|
| 1    | Mauritius.....          | 6.5   |   |           |   | 0.8 | 63   | United Kingdom.....         | 4.6   |   |           |   | 1.4 |
| 2    | Barbados.....           | 6.3   |   |           |   | 0.9 | 64   | Kyrgyz Republic.....        | 4.6   |   |           |   | 1.8 |
| 3    | Cyprus.....             | 6.1   |   |           |   | 1.1 | 65   | Norway.....                 | 4.6   |   |           |   | 1.3 |
| 4    | United Arab Emirates .. | 6.1   |   |           |   | 1.1 | 66   | Denmark.....                | 4.6   |   |           |   | 1.3 |
| 5    | Hong Kong SAR.....      | 6.0   |   |           |   | 0.9 | 67   | Mongolia.....               | 4.5   |   |           |   | 1.5 |
| 6    | Singapore.....          | 6.0   |   |           |   | 0.9 | 68   | Tajikistan.....             | 4.5   |   |           |   | 2.0 |
| 7    | Cambodia.....           | 5.9   |   |           |   | 1.0 | 69   | Argentina.....              | 4.5   |   |           |   | 1.3 |
| 8    | Malaysia.....           | 5.9   |   |           |   | 0.8 | 69   | El Salvador.....            | 4.5   |   |           |   | 1.4 |
| 9    | Gambia.....             | 5.9   |   |           |   | 1.3 | 71   | Philippines.....            | 4.5   |   |           |   | 1.4 |
| 10   | Tunisia.....            | 5.9   |   |           |   | 0.9 | 72   | Burkina Faso.....           | 4.4   |   |           |   | 2.0 |
| 11   | Zambia.....             | 5.8   |   |           |   | 1.0 | 73   | Turkey.....                 | 4.4   |   |           |   | 1.3 |
| 12   | New Zealand.....        | 5.8   |   |           |   | 0.8 | 74   | Taiwan, China.....          | 4.4   |   |           |   | 1.3 |
| 13   | Ireland.....            | 5.6   |   |           |   | 1.4 | 75   | Nigeria.....                | 4.3   |   |           |   | 1.9 |
| 14   | Thailand.....           | 5.6   |   |           |   | 1.0 | 76   | Peru.....                   | 4.3   |   |           |   | 1.4 |
| 15   | Jamaica.....            | 5.6   |   |           |   | 1.3 | 77   | Slovenia.....               | 4.2   |   |           |   | 1.5 |
| 16   | Morocco.....            | 5.5   |   |           |   | 1.7 | 78   | Colombia.....               | 4.1   |   |           |   | 1.4 |
| 17   | Spain.....              | 5.5   |   |           |   | 1.2 | 79   | Netherlands.....            | 4.1   |   |           |   | 1.4 |
| 18   | Greece.....             | 5.5   |   |           |   | 1.2 | 80   | Sweden.....                 | 4.0   |   |           |   | 1.3 |
| 19   | Portugal.....           | 5.5   |   |           |   | 0.9 | 81   | Trinidad and Tobago.....    | 4.0   |   |           |   | 1.7 |
| 20   | South Africa.....       | 5.4   |   |           |   | 1.3 | 82   | Algeria.....                | 4.0   |   |           |   | 1.9 |
| 21   | Malta.....              | 5.4   |   |           |   | 1.3 | 83   | Malawi.....                 | 4.0   |   |           |   | 1.4 |
| 22   | Jordan.....             | 5.4   |   |           |   | 1.3 | 84   | United States.....          | 4.0   |   |           |   | 1.4 |
| 23   | Austria.....            | 5.4   |   |           |   | 1.1 | 85   | Azerbaijan.....             | 3.9   |   |           |   | 1.6 |
| 24   | Qatar.....              | 5.3   |   |           |   | 1.1 | 86   | Albania.....                | 3.9   |   |           |   | 2.0 |
| 25   | Botswana.....           | 5.3   |   |           |   | 1.2 | 87   | Belgium.....                | 3.9   |   |           |   | 1.3 |
| 26   | Tanzania.....           | 5.3   |   |           |   | 1.3 | 88   | Korea, Rep.....             | 3.9   |   |           |   | 1.2 |
| 27   | Sri Lanka.....          | 5.3   |   |           |   | 1.4 | 89   | Benin.....                  | 3.9   |   |           |   | 1.7 |
| 28   | Australia.....          | 5.3   |   |           |   | 1.0 | 90   | Kazakhstan.....             | 3.9   |   |           |   | 1.7 |
| 29   | Madagascar.....         | 5.3   |   |           |   | 1.4 | 91   | Zimbabwe.....               | 3.8   |   |           |   | 1.3 |
| 30   | Egypt.....              | 5.2   |   |           |   | 1.5 | 92   | Italy.....                  | 3.8   |   |           |   | 1.7 |
| 31   | Switzerland.....        | 5.2   |   |           |   | 1.3 | 93   | Chile.....                  | 3.8   |   |           |   | 1.3 |
| 32   | Dominican Republic..... | 5.1   |   |           |   | 1.3 | 94   | Brazil.....                 | 3.8   |   |           |   | 1.5 |
| 33   | Mauritania.....         | 5.1   |   |           |   | 1.6 | 95   | Czech Republic.....         | 3.7   |   |           |   | 1.3 |
| 34   | Indonesia.....          | 5.1   |   |           |   | 0.9 | 96   | Latvia.....                 | 3.7   |   |           |   | 1.5 |
| 35   | Kenya.....              | 5.1   |   |           |   | 1.6 | 97   | Luxembourg.....             | 3.7   |   |           |   | 1.7 |
| 36   | France.....             | 5.0   |   |           |   | 1.5 | 98   | Japan.....                  | 3.6   |   |           |   | 1.4 |
| 37   | Croatia.....            | 5.0   |   |           |   | 1.5 | 99   | Slovak Republic.....        | 3.6   |   |           |   | 1.3 |
| 38   | Iceland.....            | 5.0   |   |           |   | 1.2 | 100  | Finland.....                | 3.6   |   |           |   | 1.2 |
| 39   | Mexico.....             | 5.0   |   |           |   | 1.2 | 101  | Serbia and Montenegro.....  | 3.5   |   |           |   | 1.9 |
| 40   | Mozambique.....         | 4.9   |   |           |   | 1.2 | 102  | Lesotho.....                | 3.5   |   |           |   | 1.7 |
| 41   | Uganda.....             | 4.9   |   |           |   | 1.7 | 103  | Suriname.....               | 3.5   |   |           |   | 1.4 |
| 42   | Mali.....               | 4.9   |   |           |   | 1.7 | 104  | Poland.....                 | 3.5   |   |           |   | 1.1 |
| 43   | Georgia.....            | 4.8   |   |           |   | 1.5 | 105  | Pakistan.....               | 3.5   |   |           |   | 1.6 |
| 44   | Honduras.....           | 4.8   |   |           |   | 1.6 | 106  | Ethiopia.....               | 3.4   |   |           |   | 1.6 |
| 45   | Uruguay.....            | 4.8   |   |           |   | 1.5 | 107  | Romania.....                | 3.4   |   |           |   | 1.5 |
| 46   | Namibia.....            | 4.8   |   |           |   | 1.6 | 108  | Lithuania.....              | 3.4   |   |           |   | 1.3 |
| 47   | Nepal.....              | 4.8   |   |           |   | 1.7 | 109  | Moldova.....                | 3.4   |   |           |   | 1.6 |
| 48   | Guatemala.....          | 4.8   |   |           |   | 1.4 | 110  | Angola.....                 | 3.4   |   |           |   | 1.6 |
| 49   | China.....              | 4.8   |   |           |   | 1.5 | 111  | Germany.....                | 3.4   |   |           |   | 1.6 |
| 50   | Hungary.....            | 4.8   |   |           |   | 1.2 | 112  | Bangladesh.....             | 3.2   |   |           |   | 1.7 |
| 51   | Guyana.....             | 4.8   |   |           |   | 1.4 | 113  | Ecuador.....                | 3.1   |   |           |   | 1.3 |
| 52   | Armenia.....            | 4.8   |   |           |   | 1.6 | 114  | Ukraine.....                | 3.1   |   |           |   | 1.6 |
| 52   | Costa Rica.....         | 4.8   |   |           |   | 1.6 | 115  | Cameroon.....               | 3.1   |   |           |   | 1.9 |
| 54   | Israel.....             | 4.7   |   |           |   | 1.3 | 116  | Chad.....                   | 2.8   |   |           |   | 1.9 |
| 55   | Panama.....             | 4.7   |   |           |   | 1.5 | 117  | Bosnia and Herzegovina..... | 2.8   |   |           |   | 1.4 |
| 56   | Estonia.....            | 4.7   |   |           |   | 1.3 | 118  | Macedonia, FYR.....         | 2.8   |   |           |   | 1.4 |
| 57   | Nicaragua.....          | 4.7   |   |           |   | 1.6 | 119  | Kuwait.....                 | 2.7   |   |           |   | 1.6 |
| 58   | Bulgaria.....           | 4.7   |   |           |   | 1.6 | 120  | Russian Federation.....     | 2.6   |   |           |   | 1.5 |
| 59   | India.....              | 4.7   |   |           |   | 1.4 | 121  | Paraguay.....               | 2.6   |   |           |   | 1.3 |
| 60   | Bahrain.....            | 4.7   |   |           |   | 1.6 | 122  | Bolivia.....                | 2.6   |   |           |   | 1.2 |
| 61   | Canada.....             | 4.7   |   |           |   | 1.2 | 123  | Burundi.....                | 2.5   |   |           |   | 1.6 |
| 61   | Vietnam.....            | 4.7   |   |           |   | 1.2 | 124  | Venezuela.....              | 2.4   |   |           |   | 1.5 |

SOURCE: World Economic Forum, Executive Opinion Survey 2006

## 5.02 T&T government expenditure

T&T government expenditure as percentage of total budget, 2005

RANK COUNTRY/ECONOMY HARD DATA

|    |                     |      |  |
|----|---------------------|------|--|
| 1  | Dominican Republic  | 20.9 |  |
| 2  | Jamaica             | 16.7 |  |
| 3  | Mauritius           | 15.8 |  |
| 4  | Barbados            | 15.6 |  |
| 5  | Iceland             | 13.0 |  |
| 6  | Malta               | 11.3 |  |
| 7  | Jordan              | 10.3 |  |
| 8  | Singapore           | 10.1 |  |
| 9  | Gambia              | 9.3  |  |
| 10 | Cyprus              | 9.2  |  |
| 11 | Cambodia            | 9.1  |  |
| 12 | Indonesia           | 8.9  |  |
| 13 | Estonia             | 8.1  |  |
| 14 | Paraguay            | 7.9  |  |
| 15 | Hong Kong SAR       | 7.5  |  |
| 15 | Switzerland         | 7.5  |  |
| 17 | Tunisia             | 7.2  |  |
| 18 | Kenya               | 6.9  |  |
| 19 | Egypt               | 6.6  |  |
| 20 | Portugal            | 6.5  |  |
| 21 | Spain               | 6.4  |  |
| 22 | Costa Rica          | 6.1  |  |
| 23 | Guyana              | 5.9  |  |
| 24 | Norway              | 5.5  |  |
| 24 | Tanzania            | 5.5  |  |
| 26 | Madagascar          | 5.4  |  |
| 26 | Qatar               | 5.4  |  |
| 28 | Hungary             | 5.2  |  |
| 29 | United States       | 5.1  |  |
| 30 | Nepal               | 5.0  |  |
| 30 | Ukraine             | 5.0  |  |
| 30 | Uruguay             | 5.0  |  |
| 33 | Austria             | 4.8  |  |
| 33 | Mexico              | 4.8  |  |
| 33 | Panama              | 4.8  |  |
| 36 | Guatemala           | 4.6  |  |
| 37 | Sri Lanka           | 4.4  |  |
| 38 | Slovenia            | 4.2  |  |
| 39 | Chile               | 4.1  |  |
| 39 | Japan               | 4.1  |  |
| 39 | Trinidad and Tobago | 4.1  |  |
| 42 | Canada              | 4.0  |  |
| 42 | Honduras            | 4.0  |  |
| 44 | Albania             | 3.8  |  |
| 44 | Australia           | 3.8  |  |
| 44 | Bahrain             | 3.8  |  |
| 44 | Chad                | 3.8  |  |
| 44 | China               | 3.8  |  |
| 49 | Czech Republic      | 3.7  |  |
| 49 | Ecuador             | 3.7  |  |
| 49 | Greece              | 3.7  |  |
| 49 | Namibia             | 3.7  |  |
| 53 | Ireland             | 3.6  |  |
| 54 | Italy               | 3.5  |  |
| 54 | New Zealand         | 3.5  |  |
| 54 | Philippines         | 3.5  |  |
| 54 | Venezuela           | 3.5  |  |
| 58 | Romania             | 3.4  |  |
| 59 | Belgium             | 3.2  |  |
| 59 | Bulgaria            | 3.2  |  |
| 59 | France              | 3.2  |  |
| 62 | Bolivia             | 3.1  |  |

RANK COUNTRY/ECONOMY HARD DATA

|     |                        |     |  |
|-----|------------------------|-----|--|
| 62  | Finland                | 3.1 |  |
| 64  | Benin                  | 3.0 |  |
| 64  | Latvia                 | 3.0 |  |
| 64  | Lithuania              | 3.0 |  |
| 67  | United Kingdom         | 2.9 |  |
| 68  | Brazil                 | 2.8 |  |
| 69  | Peru                   | 2.7 |  |
| 69  | Poland                 | 2.7 |  |
| 69  | Russian Federation     | 2.7 |  |
| 69  | Thailand               | 2.7 |  |
| 73  | Denmark                | 2.5 |  |
| 73  | El Salvador            | 2.5 |  |
| 73  | Korea, Rep.            | 2.5 |  |
| 73  | Luxembourg             | 2.5 |  |
| 77  | Argentina              | 2.4 |  |
| 78  | Botswana               | 2.3 |  |
| 78  | Ethiopia               | 2.3 |  |
| 78  | Uganda                 | 2.3 |  |
| 78  | Zimbabwe               | 2.3 |  |
| 82  | Germany                | 2.2 |  |
| 82  | Netherlands            | 2.2 |  |
| 82  | Sweden                 | 2.2 |  |
| 85  | Bangladesh             | 2.1 |  |
| 85  | Israel                 | 2.1 |  |
| 85  | Nicaragua              | 2.1 |  |
| 85  | Slovak Republic        | 2.1 |  |
| 85  | Zambia                 | 2.1 |  |
| 90  | Colombia               | 2.0 |  |
| 91  | Burkina Faso           | 1.9 |  |
| 91  | Pakistan               | 1.9 |  |
| 91  | United Arab Emirates   | 1.9 |  |
| 94  | Cameroon               | 1.7 |  |
| 94  | Malaysia               | 1.7 |  |
| 94  | Mali                   | 1.7 |  |
| 94  | Suriname               | 1.7 |  |
| 94  | Taiwan, China          | 1.7 |  |
| 99  | Croatia                | 1.4 |  |
| 99  | Vietnam                | 1.4 |  |
| 101 | Macedonia, FYR         | 1.3 |  |
| 101 | Malawi                 | 1.3 |  |
| 103 | Kuwait                 | 1.2 |  |
| 103 | Lesotho                | 1.2 |  |
| 105 | Algeria                | 1.1 |  |
| 105 | Angola                 | 1.1 |  |
| 105 | Bosnia and Herzegovina | 1.1 |  |
| 108 | India                  | 0.9 |  |
| 109 | Burundi                | 0.7 |  |
| 110 | Turkey                 | 0.6 |  |
| 111 | South Africa           | 0.5 |  |
| 112 | Nigeria                | 0.3 |  |
| n/a | Armenia                | n/a |  |
| n/a | Azerbaijan             | n/a |  |
| n/a | Georgia                | n/a |  |
| n/a | Kazakhstan             | n/a |  |
| n/a | Kyrgyz Republic        | n/a |  |
| n/a | Mauritania             | n/a |  |
| n/a | Moldova                | n/a |  |
| n/a | Mongolia               | n/a |  |
| n/a | Morocco                | n/a |  |
| n/a | Mozambique             | n/a |  |
| n/a | Serbia and Montenegro  | n/a |  |
| n/a | Tajikistan             | n/a |  |

## 5.03 Effectiveness of marketing and branding to attract tourists

Does your country carry out effective marketing and branding to attract inbound tourists? (1 = no, tourism marketing is nonexistent or completely ineffective, 7 = yes, tourism marketing is excellent and is very effective in attracting tourists)

| RANK | COUNTRY/ECONOMY      | SCORE | 1 | MEAN: 4.2 | 7 | SD  | RANK | COUNTRY/ECONOMY        | SCORE | 1 | MEAN: 4.2 | 7 | SD  |
|------|----------------------|-------|---|-----------|---|-----|------|------------------------|-------|---|-----------|---|-----|
| 1    | United Arab Emirates | 6.2   |   |           |   | 1.1 | 63   | Nigeria                | 4.3   |   |           |   | 1.8 |
| 2    | New Zealand          | 5.9   |   |           |   | 0.8 | 64   | Germany                | 4.3   |   |           |   | 1.3 |
| 3    | Singapore            | 5.9   |   |           |   | 1.0 | 65   | Turkey                 | 4.2   |   |           |   | 1.4 |
| 4    | Hong Kong SAR        | 5.9   |   |           |   | 0.9 | 66   | Luxembourg             | 4.2   |   |           |   | 1.6 |
| 5    | Barbados             | 5.8   |   |           |   | 1.1 | 67   | Colombia               | 4.2   |   |           |   | 1.4 |
| 6    | Malaysia             | 5.8   |   |           |   | 1.0 | 68   | Finland                | 4.1   |   |           |   | 1.2 |
| 7    | Austria              | 5.7   |   |           |   | 1.1 | 69   | Belgium                | 4.1   |   |           |   | 1.3 |
| 8    | Iceland              | 5.6   |   |           |   | 0.7 | 70   | Philippines            | 4.1   |   |           |   | 1.4 |
| 9    | Ireland              | 5.5   |   |           |   | 1.3 | 71   | Hungary                | 4.1   |   |           |   | 1.3 |
| 10   | Jamaica              | 5.5   |   |           |   | 1.2 | 72   | Nepal                  | 4.1   |   |           |   | 1.5 |
| 11   | Thailand             | 5.5   |   |           |   | 1.1 | 73   | Korea, Rep.            | 4.1   |   |           |   | 1.2 |
| 12   | Spain                | 5.5   |   |           |   | 1.1 | 74   | Guyana                 | 4.0   |   |           |   | 1.5 |
| 13   | Australia            | 5.5   |   |           |   | 1.0 | 75   | Argentina              | 4.0   |   |           |   | 1.4 |
| 14   | Tunisia              | 5.4   |   |           |   | 0.9 | 76   | El Salvador            | 4.0   |   |           |   | 1.3 |
| 15   | Indonesia            | 5.4   |   |           |   | 1.1 | 77   | Chile                  | 3.9   |   |           |   | 1.3 |
| 16   | South Africa         | 5.4   |   |           |   | 0.9 | 78   | Sweden                 | 3.9   |   |           |   | 1.3 |
| 17   | Portugal             | 5.4   |   |           |   | 0.7 | 79   | Czech Republic         | 3.9   |   |           |   | 1.3 |
| 18   | Cyprus               | 5.4   |   |           |   | 1.2 | 80   | Japan                  | 3.8   |   |           |   | 1.3 |
| 19   | Morocco              | 5.3   |   |           |   | 1.5 | 81   | Benin                  | 3.8   |   |           |   | 1.7 |
| 20   | Mali                 | 5.3   |   |           |   | 1.6 | 82   | Mozambique             | 3.8   |   |           |   | 1.5 |
| 21   | Gambia               | 5.3   |   |           |   | 1.4 | 83   | Bulgaria               | 3.8   |   |           |   | 1.5 |
| 22   | Mauritius            | 5.3   |   |           |   | 1.1 | 84   | Latvia                 | 3.7   |   |           |   | 1.4 |
| 23   | Zambia               | 5.3   |   |           |   | 1.2 | 85   | Brazil                 | 3.7   |   |           |   | 1.5 |
| 24   | Switzerland          | 5.3   |   |           |   | 1.1 | 86   | Poland                 | 3.7   |   |           |   | 1.0 |
| 25   | Mexico               | 5.2   |   |           |   | 1.1 | 87   | Slovenia               | 3.6   |   |           |   | 1.4 |
| 26   | Kenya                | 5.2   |   |           |   | 1.4 | 88   | Tajikistan             | 3.6   |   |           |   | 2.0 |
| 27   | Namibia              | 5.1   |   |           |   | 1.1 | 89   | Trinidad and Tobago    | 3.6   |   |           |   | 1.6 |
| 28   | France               | 5.1   |   |           |   | 1.3 | 90   | Kazakhstan             | 3.6   |   |           |   | 1.6 |
| 29   | United Kingdom       | 5.1   |   |           |   | 1.3 | 91   | Azerbaijan             | 3.5   |   |           |   | 1.6 |
| 30   | Cambodia             | 5.0   |   |           |   | 1.7 | 92   | Armenia                | 3.5   |   |           |   | 1.7 |
| 31   | Mauritania           | 5.0   |   |           |   | 1.7 | 93   | Italy                  | 3.4   |   |           |   | 1.6 |
| 32   | Greece               | 5.0   |   |           |   | 1.1 | 94   | Algeria                | 3.4   |   |           |   | 1.7 |
| 33   | Tanzania             | 4.9   |   |           |   | 1.4 | 95   | Lithuania              | 3.4   |   |           |   | 1.3 |
| 34   | Madagascar           | 4.9   |   |           |   | 1.4 | 96   | Georgia                | 3.4   |   |           |   | 1.5 |
| 35   | Israel               | 4.9   |   |           |   | 1.1 | 97   | Suriname               | 3.4   |   |           |   | 1.4 |
| 36   | Egypt                | 4.9   |   |           |   | 1.5 | 98   | Serbia and Montenegro  | 3.3   |   |           |   | 1.6 |
| 37   | Croatia              | 4.8   |   |           |   | 1.6 | 99   | Ethiopia               | 3.3   |   |           |   | 1.4 |
| 38   | Costa Rica           | 4.8   |   |           |   | 1.4 | 100  | Kyrgyz Republic        | 3.3   |   |           |   | 1.5 |
| 38   | Norway               | 4.8   |   |           |   | 1.1 | 101  | Malawi                 | 3.3   |   |           |   | 1.6 |
| 40   | Burkina Faso         | 4.8   |   |           |   | 1.8 | 102  | Zimbabwe               | 3.3   |   |           |   | 1.4 |
| 41   | Denmark              | 4.8   |   |           |   | 1.4 | 103  | Ecuador                | 3.2   |   |           |   | 1.3 |
| 42   | Estonia              | 4.7   |   |           |   | 1.2 | 104  | Lesotho                | 3.2   |   |           |   | 1.4 |
| 43   | Panama               | 4.7   |   |           |   | 1.3 | 105  | Ukraine                | 3.2   |   |           |   | 1.5 |
| 44   | Uganda               | 4.7   |   |           |   | 1.6 | 106  | Pakistan               | 3.2   |   |           |   | 1.5 |
| 45   | Dominican Republic   | 4.7   |   |           |   | 1.4 | 107  | Bahrain                | 3.2   |   |           |   | 1.6 |
| 46   | Canada               | 4.7   |   |           |   | 1.3 | 108  | Slovak Republic        | 3.1   |   |           |   | 1.2 |
| 47   | Peru                 | 4.6   |   |           |   | 1.2 | 109  | Moldova                | 3.1   |   |           |   | 1.5 |
| 48   | Jordan               | 4.6   |   |           |   | 1.3 | 110  | Mongolia               | 3.1   |   |           |   | 1.5 |
| 49   | Botswana             | 4.6   |   |           |   | 1.6 | 111  | Romania                | 2.9   |   |           |   | 1.3 |
| 50   | Guatemala            | 4.5   |   |           |   | 1.4 | 112  | Macedonia, FYR         | 2.8   |   |           |   | 1.4 |
| 51   | Sri Lanka            | 4.5   |   |           |   | 1.6 | 113  | Russian Federation     | 2.8   |   |           |   | 1.3 |
| 52   | Netherlands          | 4.5   |   |           |   | 1.3 | 114  | Cameroon               | 2.7   |   |           |   | 1.5 |
| 53   | Nicaragua            | 4.5   |   |           |   | 1.5 | 115  | Angola                 | 2.6   |   |           |   | 1.4 |
| 54   | United States        | 4.5   |   |           |   | 1.4 | 116  | Kuwait                 | 2.6   |   |           |   | 1.7 |
| 55   | Malta                | 4.5   |   |           |   | 1.4 | 117  | Bangladesh             | 2.6   |   |           |   | 1.5 |
| 56   | Vietnam              | 4.5   |   |           |   | 1.4 | 118  | Bosnia and Herzegovina | 2.6   |   |           |   | 1.2 |
| 57   | China                | 4.4   |   |           |   | 1.4 | 119  | Chad                   | 2.5   |   |           |   | 1.9 |
| 58   | Uruguay              | 4.4   |   |           |   | 1.3 | 120  | Albania                | 2.5   |   |           |   | 1.3 |
| 59   | India                | 4.4   |   |           |   | 1.3 | 121  | Bolivia                | 2.4   |   |           |   | 1.1 |
| 60   | Qatar                | 4.4   |   |           |   | 1.4 | 122  | Paraguay               | 2.4   |   |           |   | 1.2 |
| 60   | Taiwan, China        | 4.4   |   |           |   | 1.1 | 123  | Burundi                | 2.3   |   |           |   | 1.2 |
| 62   | Honduras             | 4.3   |   |           |   | 1.5 | 124  | Venezuela              | 2.0   |   |           |   | 1.1 |

SOURCE: World Economic Forum, Executive Opinion Survey 2006

## 5.04 T&T fair attendance

Index of country presence at 12 major T&T fairs, 2005–06

| RANK | COUNTRY/ECONOMY           | HARD DATA |  | RANK | COUNTRY/ECONOMY             | HARD DATA |  |
|------|---------------------------|-----------|--|------|-----------------------------|-----------|--|
| 1    | Poland.....               | 10.0      |  | 48   | Slovak Republic.....        | 4.0       |  |
| 2    | Malaysia.....             | 9.0       |  | 48   | Taiwan, China.....          | 4.0       |  |
| 2    | Spain.....                | 9.0       |  | 48   | Trinidad and Tobago.....    | 4.0       |  |
| 4    | Austria.....              | 8.0       |  | 48   | Uruguay.....                | 4.0       |  |
| 4    | Canada.....               | 8.0       |  | 48   | Venezuela.....              | 4.0       |  |
| 4    | China.....                | 8.0       |  | 48   | Vietnam.....                | 4.0       |  |
| 4    | Egypt.....                | 8.0       |  | 48   | Zambia.....                 | 4.0       |  |
| 4    | France.....               | 8.0       |  | 70   | Algeria.....                | 3.0       |  |
| 4    | Germany.....              | 8.0       |  | 70   | Armenia.....                | 3.0       |  |
| 4    | Greece.....               | 8.0       |  | 70   | Azerbaijan.....             | 3.0       |  |
| 4    | India.....                | 8.0       |  | 70   | Bahrain.....                | 3.0       |  |
| 4    | Thailand.....             | 8.0       |  | 70   | Belgium.....                | 3.0       |  |
| 4    | Tunisia.....              | 8.0       |  | 70   | Iceland.....                | 3.0       |  |
| 4    | Turkey.....               | 8.0       |  | 70   | Jamaica.....                | 3.0       |  |
| 15   | Bulgaria.....             | 7.0       |  | 70   | Latvia.....                 | 3.0       |  |
| 15   | Czech Republic.....       | 7.0       |  | 70   | Mali.....                   | 3.0       |  |
| 15   | Ireland.....              | 7.0       |  | 70   | New Zealand.....            | 3.0       |  |
| 15   | Italy.....                | 7.0       |  | 70   | Nigeria.....                | 3.0       |  |
| 15   | Korea, Rep.....           | 7.0       |  | 70   | Norway.....                 | 3.0       |  |
| 15   | Switzerland.....          | 7.0       |  | 70   | Paraguay.....               | 3.0       |  |
| 15   | United Arab Emirates..... | 7.0       |  | 70   | Philippines.....            | 3.0       |  |
| 15   | United Kingdom.....       | 7.0       |  | 70   | Qatar.....                  | 3.0       |  |
| 23   | Argentina.....            | 6.0       |  | 70   | Serbia and Montenegro.....  | 3.0       |  |
| 23   | Australia.....            | 6.0       |  | 70   | Slovenia.....               | 3.0       |  |
| 23   | Brazil.....               | 6.0       |  | 70   | Sweden.....                 | 3.0       |  |
| 23   | Finland.....              | 6.0       |  | 70   | Ukraine.....                | 3.0       |  |
| 23   | Indonesia.....            | 6.0       |  | 70   | Zimbabwe.....               | 3.0       |  |
| 23   | Japan.....                | 6.0       |  | 90   | Albania.....                | 2.0       |  |
| 23   | Kenya.....                | 6.0       |  | 90   | Colombia.....               | 2.0       |  |
| 23   | Malta.....                | 6.0       |  | 90   | Denmark.....                | 2.0       |  |
| 23   | Mexico.....               | 6.0       |  | 90   | Gambia.....                 | 2.0       |  |
| 23   | Morocco.....              | 6.0       |  | 90   | Honduras.....               | 2.0       |  |
| 23   | Romania.....              | 6.0       |  | 90   | Kazakhstan.....             | 2.0       |  |
| 23   | Russian Federation.....   | 6.0       |  | 90   | Kuwait.....                 | 2.0       |  |
| 35   | Bolivia.....              | 5.0       |  | 90   | Kyrgyz Republic.....        | 2.0       |  |
| 35   | Cambodia.....             | 5.0       |  | 90   | Mauritius.....              | 2.0       |  |
| 35   | Costa Rica.....           | 5.0       |  | 90   | Mozambique.....             | 2.0       |  |
| 35   | Croatia.....              | 5.0       |  | 90   | Netherlands.....            | 2.0       |  |
| 35   | Cyprus.....               | 5.0       |  | 90   | Nicaragua.....              | 2.0       |  |
| 35   | Guatemala.....            | 5.0       |  | 90   | Pakistan.....               | 2.0       |  |
| 35   | Hungary.....              | 5.0       |  | 90   | Panama.....                 | 2.0       |  |
| 35   | Israel.....               | 5.0       |  | 90   | Uganda.....                 | 2.0       |  |
| 35   | Peru.....                 | 5.0       |  | 105  | Angola.....                 | 1.0       |  |
| 35   | South Africa.....         | 5.0       |  | 105  | Bangladesh.....             | 1.0       |  |
| 35   | Sri Lanka.....            | 5.0       |  | 105  | Barbados.....               | 1.0       |  |
| 35   | Tanzania.....             | 5.0       |  | 105  | Botswana.....               | 1.0       |  |
| 35   | United States.....        | 5.0       |  | 105  | Cameroon.....               | 1.0       |  |
| 48   | Chile.....                | 4.0       |  | 105  | El Salvador.....            | 1.0       |  |
| 48   | Dominican Republic.....   | 4.0       |  | 105  | Lesotho.....                | 1.0       |  |
| 48   | Ecuador.....              | 4.0       |  | 105  | Macedonia, FYR.....         | 1.0       |  |
| 48   | Estonia.....              | 4.0       |  | 105  | Madagascar.....             | 1.0       |  |
| 48   | Ethiopia.....             | 4.0       |  | 105  | Mauritania.....             | 1.0       |  |
| 48   | Georgia.....              | 4.0       |  | 105  | Moldova.....                | 1.0       |  |
| 48   | Guyana.....               | 4.0       |  | 105  | Namibia.....                | 1.0       |  |
| 48   | Hong Kong SAR.....        | 4.0       |  | 117  | Benin.....                  | 0.0       |  |
| 48   | Jordan.....               | 4.0       |  | 117  | Bosnia and Herzegovina..... | 0.0       |  |
| 48   | Lithuania.....            | 4.0       |  | 117  | Burkina Faso.....           | 0.0       |  |
| 48   | Luxembourg.....           | 4.0       |  | 117  | Burundi.....                | 0.0       |  |
| 48   | Mongolia.....             | 4.0       |  | 117  | Chad.....                   | 0.0       |  |
| 48   | Nepal.....                | 4.0       |  | 117  | Malawi.....                 | 0.0       |  |
| 48   | Portugal.....             | 4.0       |  | 117  | Suriname.....               | 0.0       |  |
| 48   | Singapore.....            | 4.0       |  | 117  | Tajikistan.....             | 0.0       |  |

SOURCE: Booz Allen Hamilton Inc.



## Pillar 6

# Air transport infrastructure

## 6.01 Quality of air transport infrastructure

Passenger air transport in your country is (1 = infrequent, limited and inefficient, 7 = as frequent, extensive, and efficient as the world's best)

| RANK | COUNTRY/ECONOMY      | SCORE | 1 | MEAN: 4.5 | 7 | SD  | RANK | COUNTRY/ECONOMY        | SCORE | 1 | MEAN: 4.5 | 7 | SD  |
|------|----------------------|-------|---|-----------|---|-----|------|------------------------|-------|---|-----------|---|-----|
| 1    | Singapore            | 6.9   |   |           |   | 0.3 | 63   | Hungary                | 4.5   |   |           |   | 1.4 |
| 2    | Germany              | 6.7   |   |           |   | 0.5 | 64   | Ethiopia               | 4.5   |   |           |   | 1.6 |
| 3    | Hong Kong SAR        | 6.7   |   |           |   | 0.9 | 65   | Morocco                | 4.5   |   |           |   | 1.6 |
| 4    | Netherlands          | 6.6   |   |           |   | 0.7 | 66   | Guatemala              | 4.4   |   |           |   | 1.3 |
| 5    | France               | 6.5   |   |           |   | 0.7 | 67   | Italy                  | 4.4   |   |           |   | 1.5 |
| 6    | United Kingdom       | 6.5   |   |           |   | 0.7 | 68   | Costa Rica             | 4.3   |   |           |   | 1.2 |
| 7    | United Arab Emirates | 6.5   |   |           |   | 0.9 | 69   | Russian Federation     | 4.3   |   |           |   | 1.5 |
| 8    | Japan                | 6.4   |   |           |   | 0.7 | 70   | Croatia                | 4.2   |   |           |   | 1.4 |
| 9    | Denmark              | 6.3   |   |           |   | 0.8 | 71   | Ecuador                | 4.2   |   |           |   | 1.0 |
| 10   | Finland              | 6.3   |   |           |   | 0.9 | 72   | Kazakhstan             | 4.1   |   |           |   | 1.6 |
| 11   | United States        | 6.2   |   |           |   | 1.1 | 73   | Indonesia              | 4.1   |   |           |   | 0.8 |
| 12   | Barbados             | 6.0   |   |           |   | 0.7 | 74   | Moldova                | 4.1   |   |           |   | 1.4 |
| 13   | Iceland              | 6.0   |   |           |   | 0.8 | 75   | Sri Lanka              | 4.1   |   |           |   | 1.6 |
| 14   | Switzerland          | 6.0   |   |           |   | 1.0 | 76   | Philippines            | 4.0   |   |           |   | 1.4 |
| 15   | Australia            | 6.0   |   |           |   | 0.8 | 77   | Honduras               | 4.0   |   |           |   | 1.4 |
| 16   | Malaysia             | 6.0   |   |           |   | 0.8 | 78   | Gambia                 | 3.9   |   |           |   | 1.5 |
| 17   | Canada               | 6.0   |   |           |   | 1.1 | 79   | Venezuela              | 3.9   |   |           |   | 1.2 |
| 18   | Belgium              | 6.0   |   |           |   | 1.1 | 80   | Cambodia               | 3.9   |   |           |   | 1.4 |
| 19   | Norway               | 5.9   |   |           |   | 0.9 | 81   | Nicaragua              | 3.8   |   |           |   | 1.4 |
| 20   | Taiwan, China        | 5.8   |   |           |   | 0.9 | 82   | Vietnam                | 3.8   |   |           |   | 1.3 |
| 21   | Sweden               | 5.8   |   |           |   | 0.9 | 83   | Slovak Republic        | 3.8   |   |           |   | 1.3 |
| 22   | South Africa         | 5.8   |   |           |   | 0.9 | 84   | Argentina              | 3.8   |   |           |   | 1.2 |
| 23   | Spain                | 5.7   |   |           |   | 0.9 | 85   | Armenia                | 3.8   |   |           |   | 1.4 |
| 24   | Portugal             | 5.7   |   |           |   | 1.1 | 86   | Poland                 | 3.8   |   |           |   | 1.0 |
| 25   | El Salvador          | 5.7   |   |           |   | 0.9 | 87   | Botswana               | 3.8   |   |           |   | 1.4 |
| 26   | Israel               | 5.7   |   |           |   | 1.4 | 88   | Tanzania               | 3.7   |   |           |   | 1.4 |
| 27   | Austria              | 5.7   |   |           |   | 1.2 | 89   | China                  | 3.7   |   |           |   | 1.4 |
| 28   | New Zealand          | 5.7   |   |           |   | 1.0 | 90   | Romania                | 3.6   |   |           |   | 1.4 |
| 29   | Chile                | 5.6   |   |           |   | 0.9 | 91   | Algeria                | 3.5   |   |           |   | 1.3 |
| 30   | Ireland              | 5.6   |   |           |   | 1.1 | 92   | Bulgaria               | 3.5   |   |           |   | 1.4 |
| 31   | Thailand             | 5.5   |   |           |   | 1.0 | 93   | Mozambique             | 3.5   |   |           |   | 1.1 |
| 32   | Korea, Rep.          | 5.5   |   |           |   | 0.9 | 94   | Nigeria                | 3.5   |   |           |   | 1.9 |
| 33   | Jamaica              | 5.5   |   |           |   | 1.2 | 95   | Georgia                | 3.4   |   |           |   | 1.3 |
| 34   | Dominican Republic   | 5.5   |   |           |   | 1.0 | 96   | Uganda                 | 3.3   |   |           |   | 1.6 |
| 35   | Qatar                | 5.4   |   |           |   | 1.4 | 97   | Peru                   | 3.3   |   |           |   | 1.2 |
| 36   | Greece               | 5.4   |   |           |   | 1.0 | 98   | Nepal                  | 3.3   |   |           |   | 1.4 |
| 37   | Bahrain              | 5.4   |   |           |   | 1.3 | 99   | Angola                 | 3.3   |   |           |   | 1.4 |
| 38   | Luxembourg           | 5.3   |   |           |   | 1.1 | 100  | Madagascar             | 3.2   |   |           |   | 1.4 |
| 38   | Mauritius            | 5.3   |   |           |   | 0.8 | 101  | Uruguay                | 3.2   |   |           |   | 1.4 |
| 40   | Malta                | 5.3   |   |           |   | 0.9 | 102  | Serbia and Montenegro  | 3.2   |   |           |   | 1.4 |
| 41   | Latvia               | 5.2   |   |           |   | 1.3 | 103  | Albania                | 3.1   |   |           |   | 1.4 |
| 42   | Panama               | 5.2   |   |           |   | 1.4 | 104  | Kyrgyz Republic        | 3.1   |   |           |   | 1.6 |
| 43   | Azerbaijan           | 5.1   |   |           |   | 1.4 | 105  | Guyana                 | 3.0   |   |           |   | 1.3 |
| 44   | Estonia              | 5.1   |   |           |   | 1.2 | 106  | Ukraine                | 3.0   |   |           |   | 1.4 |
| 45   | Czech Republic       | 5.1   |   |           |   | 1.2 | 107  | Paraguay               | 3.0   |   |           |   | 1.3 |
| 46   | India                | 5.1   |   |           |   | 1.1 | 108  | Bolivia                | 2.9   |   |           |   | 1.2 |
| 47   | Kuwait               | 5.0   |   |           |   | 1.4 | 109  | Macedonia, FYR         | 2.9   |   |           |   | 1.2 |
| 48   | Jordan               | 5.0   |   |           |   | 1.3 | 110  | Tajikistan             | 2.9   |   |           |   | 1.8 |
| 49   | Tunisia              | 5.0   |   |           |   | 1.0 | 111  | Burkina Faso           | 2.9   |   |           |   | 1.5 |
| 50   | Kenya                | 5.0   |   |           |   | 1.4 | 112  | Mongolia               | 2.8   |   |           |   | 1.3 |
| 51   | Namibia              | 4.9   |   |           |   | 1.2 | 113  | Malawi                 | 2.8   |   |           |   | 1.2 |
| 52   | Cyprus               | 4.9   |   |           |   | 1.4 | 114  | Mali                   | 2.7   |   |           |   | 1.4 |
| 53   | Colombia             | 4.9   |   |           |   | 1.1 | 115  | Zimbabwe               | 2.6   |   |           |   | 1.3 |
| 54   | Turkey               | 4.7   |   |           |   | 1.3 | 116  | Benin                  | 2.6   |   |           |   | 1.4 |
| 55   | Mexico               | 4.7   |   |           |   | 1.2 | 117  | Bosnia and Herzegovina | 2.5   |   |           |   | 1.4 |
| 56   | Egypt                | 4.7   |   |           |   | 1.5 | 118  | Mauritania             | 2.5   |   |           |   | 1.5 |
| 57   | Brazil               | 4.6   |   |           |   | 1.3 | 119  | Suriname               | 2.5   |   |           |   | 1.2 |
| 58   | Zambia               | 4.6   |   |           |   | 1.7 | 120  | Bangladesh             | 2.5   |   |           |   | 1.4 |
| 59   | Pakistan             | 4.6   |   |           |   | 1.2 | 121  | Burundi                | 2.4   |   |           |   | 1.4 |
| 60   | Slovenia             | 4.6   |   |           |   | 1.2 | 122  | Cameroon               | 2.2   |   |           |   | 1.3 |
| 61   | Trinidad and Tobago  | 4.6   |   |           |   | 1.3 | 123  | Lesotho                | 2.2   |   |           |   | 1.4 |
| 62   | Lithuania            | 4.5   |   |           |   | 1.2 | 124  | Chad                   | 2.1   |   |           |   | 1.2 |

SOURCE: World Economic Forum, Executive Opinion Survey 2006



## 6.02 Available seat kilometers

Scheduled available seat kilometers per week originating in country (in millions), August 2005 and February 2006 average

| RANK | COUNTRY/ECONOMY      | HARD DATA |  | RANK | COUNTRY/ECONOMY        | HARD DATA |
|------|----------------------|-----------|--|------|------------------------|-----------|
| 1    | United States        | 32,095.3  |  | 63   | Jamaica                | 121.7     |
| 2    | China                | 5,923.3   |  | 64   | Jordan                 | 108.6     |
| 3    | United Kingdom       | 5,688.7   |  | 65   | Costa Rica             | 105.2     |
| 4    | Japan                | 5,246.2   |  | 66   | Panama                 | 104.8     |
| 5    | Germany              | 3,990.6   |  | 67   | Kazakhstan             | 93.8      |
| 6    | France               | 3,119.7   |  | 68   | Romania                | 88.3      |
| 7    | Australia            | 2,772.4   |  | 69   | Barbados               | 83.6      |
| 8    | Spain                | 2,728.1   |  | 70   | Tunisia                | 82.4      |
| 9    | Canada               | 2,539.6   |  | 71   | Ethiopia               | 80.0      |
| 10   | Singapore            | 1,793.3   |  | 72   | Algeria                | 66.2      |
| 11   | Hong Kong SAR        | 1,762.4   |  | 73   | Iceland                | 63.9      |
| 12   | Italy                | 1,748.9   |  | 74   | El Salvador            | 58.7      |
| 13   | Brazil               | 1,723.4   |  | 75   | Bolivia                | 54.1      |
| 14   | Thailand             | 1,699.4   |  | 76   | Bulgaria               | 51.3      |
| 15   | India                | 1,660.2   |  | 77   | Guatemala              | 45.4      |
| 16   | Russian Federation   | 1,604.4   |  | 78   | Azerbaijan             | 44.9      |
| 17   | Netherlands          | 1,453.6   |  | 79   | Trinidad and Tobago    | 44.6      |
| 18   | Mexico               | 1,433.6   |  | 80   | Malta                  | 41.6      |
| 19   | Korea, Rep.          | 1,384.5   |  | 81   | Serbia and Montenegro  | 40.1      |
| 20   | United Arab Emirates | 1,277.6   |  | 82   | Tanzania               | 39.7      |
| 21   | Malaysia             | 1,011.2   |  | 83   | Angola                 | 39.6      |
| 22   | South Africa         | 955.7     |  | 84   | Nepal                  | 37.8      |
| 23   | Taiwan, China        | 890.3     |  | 85   | Latvia                 | 36.0      |
| 24   | Indonesia            | 768.4     |  | 86   | Armenia                | 34.8      |
| 25   | New Zealand          | 658.3     |  | 87   | Madagascar             | 33.9      |
| 26   | Switzerland          | 650.7     |  | 88   | Croatia                | 33.2      |
| 27   | Turkey               | 574.0     |  | 89   | Cambodia               | 32.8      |
| 28   | Argentina            | 555.2     |  | 90   | Namibia                | 32.3      |
| 29   | Philippines          | 548.5     |  | 91   | Cameroon               | 27.5      |
| 30   | Portugal             | 478.6     |  | 92   | Kyrgyz Republic        | 25.9      |
| 31   | Greece               | 420.2     |  | 93   | Lithuania              | 23.0      |
| 32   | Austria              | 391.4     |  | 94   | Mozambique             | 22.7      |
| 33   | Denmark              | 374.3     |  | 95   | Zimbabwe               | 22.3      |
| 34   | Sweden               | 369.4     |  | 96   | Uruguay                | 21.2      |
| 35   | Egypt                | 351.4     |  | 97   | Slovak Republic        | 20.6      |
| 36   | Israel               | 350.2     |  | 98   | Mali                   | 20.4      |
| 37   | Ireland              | 322.4     |  | 99   | Honduras               | 19.5      |
| 38   | Chile                | 316.7     |  | 100  | Uganda                 | 18.5      |
| 39   | Norway               | 313.6     |  | 101  | Luxembourg             | 17.5      |
| 40   | Pakistan             | 310.8     |  | 102  | Nicaragua              | 17.3      |
| 41   | Vietnam              | 305.8     |  | 103  | Estonia                | 16.6      |
| 42   | Belgium              | 295.6     |  | 104  | Suriname               | 16.0      |
| 43   | Colombia             | 279.0     |  | 105  | Zambia                 | 15.0      |
| 44   | Qatar                | 263.3     |  | 106  | Georgia                | 14.8      |
| 45   | Finland              | 255.1     |  | 107  | Mongolia               | 14.3      |
| 46   | Peru                 | 234.8     |  | 108  | Slovenia               | 13.5      |
| 47   | Venezuela            | 226.5     |  | 109  | Paraguay               | 11.1      |
| 48   | Dominican Republic   | 222.8     |  | 110  | Benin                  | 11.1      |
| 49   | Morocco              | 191.0     |  | 111  | Albania                | 11.0      |
| 50   | Poland               | 190.3     |  | 112  | Tajikistan             | 10.0      |
| 51   | Kenya                | 182.7     |  | 113  | Mauritania             | 9.5       |
| 52   | Sri Lanka            | 165.8     |  | 114  | Guyana                 | 7.9       |
| 53   | Czech Republic       | 157.7     |  | 115  | Burkina Faso           | 7.6       |
| 54   | Kuwait               | 156.0     |  | 116  | Macedonia, FYR         | 7.4       |
| 55   | Bahrain              | 150.9     |  | 117  | Moldova                | 7.0       |
| 56   | Mauritius            | 137.1     |  | 118  | Chad                   | 6.7       |
| 57   | Nigeria              | 136.7     |  | 119  | Malawi                 | 6.3       |
| 58   | Bangladesh           | 132.2     |  | 120  | Botswana               | 3.8       |
| 59   | Hungary              | 129.4     |  | 121  | Bosnia and Herzegovina | 3.1       |
| 60   | Ecuador              | 124.6     |  | 122  | Burundi                | 1.7       |
| 61   | Ukraine              | 123.0     |  | 123  | Gambia                 | 1.6       |
| 62   | Cyprus               | 122.3     |  | 124  | Lesotho                | 0.2       |

SOURCE: International Air Transport Association, SRS Analyser

## 6.03 Departures per 1,000 population

Number of aircraft departures per 1,000 population, 2005

RANK COUNTRY/ECONOMY HARD DATA

|    |                      |      |  |
|----|----------------------|------|--|
| 1  | Luxembourg           | 81.5 |  |
| 2  | Norway               | 66.8 |  |
| 3  | New Zealand          | 66.0 |  |
| 4  | Ireland              | 40.9 |  |
| 5  | Iceland              | 39.4 |  |
| 6  | Switzerland          | 38.0 |  |
| 7  | Malta                | 37.9 |  |
| 8  | Qatar                | 31.3 |  |
| 9  | Bahrain              | 28.9 |  |
| 10 | United States        | 28.9 |  |
| 11 | Trinidad and Tobago  | 26.0 |  |
| 12 | Sweden               | 26.0 |  |
| 13 | Finland              | 24.7 |  |
| 14 | Denmark              | 20.3 |  |
| 15 | United Arab Emirates | 19.8 |  |
| 16 | Australia            | 19.3 |  |
| 17 | Belgium              | 17.2 |  |
| 18 | Singapore            | 17.2 |  |
| 19 | Cyprus               | 17.0 |  |
| 20 | United Kingdom       | 16.3 |  |
| 21 | Austria              | 16.3 |  |
| 22 | Netherlands          | 13.8 |  |
| 23 | France               | 13.0 |  |
| 24 | Spain                | 12.8 |  |
| 25 | Zimbabwe             | 10.7 |  |
| 26 | Mauritius            | 10.4 |  |
| 27 | Greece               | 9.6  |  |
| 28 | Germany              | 9.5  |  |
| 29 | Portugal             | 9.1  |  |
| 30 | Jamaica              | 8.9  |  |
| 31 | Canada               | 8.9  |  |
| 32 | Israel               | 8.3  |  |
| 33 | Panama               | 7.9  |  |
| 34 | Malaysia             | 7.3  |  |
| 35 | Kuwait               | 7.1  |  |
| 36 | Italy                | 6.8  |  |
| 37 | El Salvador          | 6.6  |  |
| 38 | Costa Rica           | 6.6  |  |
| 39 | Slovenia             | 6.6  |  |
| 40 | Mongolia             | 6.3  |  |
| 41 | Estonia              | 6.3  |  |
| 42 | Chile                | 5.2  |  |
| 43 | Japan                | 5.0  |  |
| 44 | Latvia               | 4.8  |  |
| 45 | Colombia             | 4.4  |  |
| 46 | Suriname             | 4.3  |  |
| 47 | Botswana             | 4.3  |  |
| 48 | Czech Republic       | 4.3  |  |
| 49 | Croatia              | 4.1  |  |
| 50 | Brazil               | 3.5  |  |
| 51 | Hungary              | 3.2  |  |
| 52 | Argentina            | 3.1  |  |
| 53 | Lithuania            | 2.9  |  |
| 54 | Uruguay              | 2.8  |  |
| 55 | Jordan               | 2.8  |  |
| 56 | South Africa         | 2.8  |  |
| 57 | Mexico               | 2.7  |  |
| 58 | Namibia              | 2.7  |  |
| 59 | Macedonia, FYR       | 2.3  |  |
| 60 | Russian Federation   | 2.3  |  |
| 61 | Bolivia              | 2.3  |  |
| 62 | Tunisia              | 1.9  |  |

RANK COUNTRY/ECONOMY HARD DATA

|     |                        |     |  |
|-----|------------------------|-----|--|
| 63  | Poland                 | 1.9 |  |
| 64  | Thailand               | 1.6 |  |
| 65  | Turkey                 | 1.5 |  |
| 66  | Algeria                | 1.4 |  |
| 67  | Morocco                | 1.4 |  |
| 68  | Paraguay               | 1.3 |  |
| 69  | Ecuador                | 1.2 |  |
| 70  | Madagascar             | 1.2 |  |
| 71  | Albania                | 1.1 |  |
| 72  | Peru                   | 1.1 |  |
| 73  | Bosnia and Herzegovina | 1.0 |  |
| 74  | Azerbaijan             | 1.0 |  |
| 75  | Kyrgyz Republic        | 1.0 |  |
| 76  | Armenia                | 0.9 |  |
| 77  | Romania                | 0.9 |  |
| 78  | Bulgaria               | 0.9 |  |
| 79  | Moldova                | 0.9 |  |
| 80  | Ukraine                | 0.8 |  |
| 81  | Kenya                  | 0.7 |  |
| 82  | Mauritania             | 0.7 |  |
| 83  | Indonesia              | 0.7 |  |
| 84  | China                  | 0.6 |  |
| 85  | Tajikistan             | 0.6 |  |
| 86  | Sri Lanka              | 0.6 |  |
| 87  | Kazakhstan             | 0.6 |  |
| 88  | Guatemala              | 0.5 |  |
| 89  | Philippines            | 0.5 |  |
| 90  | Nepal                  | 0.4 |  |
| 91  | Zambia                 | 0.4 |  |
| 92  | Vietnam                | 0.4 |  |
| 93  | Georgia                | 0.4 |  |
| 94  | Guyana                 | 0.4 |  |
| 95  | Ethiopia               | 0.4 |  |
| 96  | Mozambique             | 0.4 |  |
| 97  | Angola                 | 0.4 |  |
| 98  | Malawi                 | 0.4 |  |
| 99  | Taiwan, China          | 0.3 |  |
| 100 | Slovak Republic        | 0.3 |  |
| 101 | Pakistan               | 0.3 |  |
| 102 | Cameroon               | 0.3 |  |
| 103 | India                  | 0.2 |  |
| 104 | Burundi                | 0.2 |  |
| 105 | Burkina Faso           | 0.1 |  |
| 106 | Tanzania               | 0.1 |  |
| 107 | Lesotho                | 0.1 |  |
| 108 | Benin                  | 0.1 |  |
| 109 | Nicaragua              | 0.1 |  |
| 110 | Chad                   | 0.1 |  |
| 111 | Nigeria                | 0.1 |  |
| 112 | Mali                   | 0.1 |  |
| 113 | Bangladesh             | 0.0 |  |
| 114 | Dominican Republic     | 0.0 |  |
| 115 | Uganda                 | 0.0 |  |
| n/a | Barbados               | n/a |  |
| n/a | Cambodia               | n/a |  |
| n/a | Egypt                  | n/a |  |
| n/a | Gambia                 | n/a |  |
| n/a | Honduras               | n/a |  |
| n/a | Hong Kong SAR          | n/a |  |
| n/a | Korea, Rep.            | n/a |  |
| n/a | Serbia and Montenegro  | n/a |  |
| n/a | Venezuela              | n/a |  |

SOURCE: Booz Allen Hamilton Inc.

## 6.04 Airport density

Number of airports per million population, 2005

RANK COUNTRY/ECONOMY HARD DATA

|    |                      |       |
|----|----------------------|-------|
| 1  | Iceland              | 330.3 |
| 2  | Paraguay             | 138.3 |
| 3  | Bolivia              | 120.2 |
| 4  | Suriname             | 105.0 |
| 5  | Namibia              | 67.0  |
| 6  | Guyana               | 64.0  |
| 7  | Botswana             | 51.8  |
| 8  | United States        | 50.2  |
| 9  | Canada               | 40.4  |
| 10 | Guatemala            | 37.6  |
| 11 | Costa Rica           | 37.1  |
| 12 | Argentina            | 33.7  |
| 13 | Panama               | 33.4  |
| 14 | Zimbabwe             | 33.2  |
| 15 | Nicaragua            | 32.2  |
| 16 | New Zealand          | 28.7  |
| 17 | Bulgaria             | 28.6  |
| 18 | Lithuania            | 28.4  |
| 19 | Finland              | 28.3  |
| 20 | Sweden               | 28.2  |
| 21 | Chile                | 22.8  |
| 21 | Colombia             | 22.8  |
| 23 | Australia            | 22.3  |
| 24 | Brazil               | 22.2  |
| 25 | Norway               | 22.0  |
| 26 | Cyprus               | 21.8  |
| 26 | Estonia              | 21.8  |
| 26 | Latvia               | 21.8  |
| 29 | Kazakhstan           | 20.7  |
| 30 | Angola               | 20.5  |
| 31 | Uruguay              | 18.7  |
| 32 | Russian Federation   | 18.0  |
| 33 | Denmark              | 17.9  |
| 34 | Mexico               | 17.3  |
| 35 | Mongolia             | 16.5  |
| 36 | South Africa         | 16.4  |
| 37 | Honduras             | 16.0  |
| 38 | Ecuador              | 15.3  |
| 39 | Croatia              | 15.1  |
| 40 | Venezuela            | 14.5  |
| 41 | Ukraine              | 14.0  |
| 42 | Lesotho              | 13.8  |
| 43 | United Arab Emirates | 13.7  |
| 44 | Jamaica              | 12.8  |
| 45 | Czech Republic       | 11.7  |
| 46 | El Salvador          | 10.9  |
| 47 | Kyrgyz Republic      | 10.1  |
| 48 | Zambia               | 9.7   |
| 49 | Ireland              | 9.0   |
| 50 | Switzerland          | 8.7   |
| 51 | Peru                 | 8.4   |
| 52 | Macedonia, FYR       | 8.3   |
| 53 | Israel               | 8.1   |
| 53 | Mozambique           | 8.1   |
| 55 | France               | 7.9   |
| 56 | Mauritania           | 7.8   |
| 56 | United Kingdom       | 7.8   |
| 58 | Tajikistan           | 7.7   |
| 59 | Greece               | 7.5   |
| 60 | Slovenia             | 7.0   |
| 61 | Austria              | 6.7   |
| 61 | Germany              | 6.7   |

RANK COUNTRY/ECONOMY HARD DATA

|     |                        |     |
|-----|------------------------|-----|
| 63  | Kenya                  | 6.5 |
| 64  | Georgia                | 6.4 |
| 64  | Madagascar             | 6.4 |
| 66  | Azerbaijan             | 6.3 |
| 66  | Slovak Republic        | 6.3 |
| 68  | Portugal               | 6.2 |
| 69  | Bosnia and Herzegovina | 6.1 |
| 70  | Bahrain                | 5.8 |
| 71  | Trinidad and Tobago    | 5.6 |
| 72  | Armenia                | 5.4 |
| 73  | Chad                   | 5.2 |
| 73  | Moldova                | 5.2 |
| 75  | Malaysia               | 4.9 |
| 75  | Mauritius              | 4.9 |
| 77  | Qatar                  | 4.6 |
| 78  | Hungary                | 4.4 |
| 79  | Luxembourg             | 4.3 |
| 80  | Algeria                | 4.2 |
| 81  | Belgium                | 4.1 |
| 81  | Serbia and Montenegro  | 4.1 |
| 83  | Spain                  | 3.9 |
| 84  | Korea, Rep.            | 3.7 |
| 85  | Barbados               | 3.6 |
| 86  | Dominican Republic     | 3.4 |
| 87  | Malawi                 | 3.3 |
| 87  | Tanzania               | 3.3 |
| 89  | Poland                 | 3.2 |
| 90  | Albania                | 3.1 |
| 91  | Jordan                 | 3.0 |
| 91  | Kuwait                 | 3.0 |
| 91  | Tunisia                | 3.0 |
| 94  | Philippines            | 2.9 |
| 95  | Cameroon               | 2.8 |
| 95  | Indonesia              | 2.8 |
| 97  | Romania                | 2.7 |
| 98  | Mali                   | 2.5 |
| 98  | Malta                  | 2.5 |
| 100 | Burkina Faso           | 2.4 |
| 101 | Italy                  | 2.3 |
| 101 | Singapore              | 2.3 |
| 103 | Morocco                | 1.9 |
| 104 | Nepal                  | 1.7 |
| 104 | Taiwan, China          | 1.7 |
| 104 | Thailand               | 1.7 |
| 104 | Turkey                 | 1.7 |
| 108 | Netherlands            | 1.6 |
| 109 | Cambodia               | 1.5 |
| 110 | Japan                  | 1.4 |
| 111 | Egypt                  | 1.1 |
| 111 | Ethiopia               | 1.1 |
| 111 | Uganda                 | 1.1 |
| 114 | Burundi                | 1.0 |
| 115 | Pakistan               | 0.8 |
| 116 | Benin                  | 0.7 |
| 116 | Sri Lanka              | 0.7 |
| 118 | Gambia                 | 0.6 |
| 118 | Hong Kong SAR          | 0.6 |
| 120 | Nigeria                | 0.5 |
| 121 | China                  | 0.4 |
| 121 | India                  | 0.4 |
| 123 | Vietnam                | 0.3 |
| 124 | Bangladesh             | 0.1 |

SOURCE: Booz Allen Hamilton Inc.

## 6.05 Number of operating airlines

Number of airlines with scheduled flights originating in country, August 2005 and February 2006 average

RANK COUNTRY/ECONOMY HARD DATA

|    |                            |       |  |
|----|----------------------------|-------|--|
| 1  | United States .....        | 174.5 |  |
| 2  | United Kingdom .....       | 159.0 |  |
| 3  | France .....               | 157.5 |  |
| 4  | Germany .....              | 149.0 |  |
| 5  | Italy .....                | 128.5 |  |
| 6  | Russian Federation .....   | 108.0 |  |
| 7  | Spain .....                | 101.0 |  |
| 8  | Canada .....               | 85.0  |  |
| 9  | Netherlands .....          | 83.0  |  |
| 10 | Switzerland .....          | 82.5  |  |
| 11 | Thailand .....             | 79.0  |  |
| 12 | China .....                | 78.0  |  |
| 13 | United Arab Emirates ..... | 74.0  |  |
| 14 | India .....                | 70.5  |  |
| 15 | Japan .....                | 68.0  |  |
| 16 | Turkey .....               | 67.5  |  |
| 17 | Austria .....              | 62.0  |  |
| 18 | Sweden .....               | 61.5  |  |
| 19 | Denmark .....              | 60.5  |  |
| 19 | Portugal .....             | 60.5  |  |
| 21 | Australia .....            | 59.0  |  |
| 22 | Hong Kong SAR .....        | 58.5  |  |
| 22 | Singapore .....            | 58.5  |  |
| 24 | Greece .....               | 57.0  |  |
| 25 | Belgium .....              | 55.5  |  |
| 26 | Egypt .....                | 53.0  |  |
| 27 | Malaysia .....             | 48.5  |  |
| 28 | Mexico .....               | 46.5  |  |
| 28 | South Africa .....         | 46.5  |  |
| 30 | Czech Republic .....       | 46.0  |  |
| 31 | Ukraine .....              | 45.0  |  |
| 32 | Ireland .....              | 43.0  |  |
| 33 | Indonesia .....            | 42.0  |  |
| 33 | Korea, Rep .....           | 42.0  |  |
| 35 | Hungary .....              | 40.0  |  |
| 36 | Norway .....               | 39.0  |  |
| 37 | Brazil .....               | 38.0  |  |
| 38 | Cyprus .....               | 36.5  |  |
| 39 | Poland .....               | 35.5  |  |
| 40 | Israel .....               | 34.5  |  |
| 40 | Philippines .....          | 34.5  |  |
| 42 | Argentina .....            | 33.0  |  |
| 43 | Kuwait .....               | 32.5  |  |
| 44 | Dominican Republic .....   | 31.5  |  |
| 45 | Venezuela .....            | 30.0  |  |
| 45 | Vietnam .....              | 30.0  |  |
| 47 | Armenia .....              | 27.5  |  |
| 47 | Azerbaijan .....           | 27.5  |  |
| 47 | Morocco .....              | 27.5  |  |
| 50 | Colombia .....             | 27.0  |  |
| 51 | Pakistan .....             | 26.5  |  |
| 51 | Taiwan, China .....        | 26.5  |  |
| 53 | Kenya .....                | 26.0  |  |
| 54 | Bulgaria .....             | 25.5  |  |
| 54 | Finland .....              | 25.5  |  |
| 54 | Romania .....              | 25.5  |  |
| 57 | Qatar .....                | 24.0  |  |
| 57 | Tunisia .....              | 24.0  |  |
| 59 | Bahrain .....              | 22.5  |  |
| 59 | New Zealand .....          | 22.5  |  |
| 61 | Peru .....                 | 22.0  |  |
| 61 | Sri Lanka .....            | 22.0  |  |

RANK COUNTRY/ECONOMY HARD DATA

|     |                              |      |  |
|-----|------------------------------|------|--|
| 63  | Jordan .....                 | 21.5 |  |
| 64  | Nigeria .....                | 20.5 |  |
| 64  | Serbia and Montenegro .....  | 20.5 |  |
| 66  | Jamaica .....                | 20.0 |  |
| 66  | Kazakhstan .....             | 20.0 |  |
| 68  | Chile .....                  | 19.5 |  |
| 69  | Bangladesh .....             | 19.0 |  |
| 69  | Cambodia .....               | 19.0 |  |
| 71  | Ecuador .....                | 18.5 |  |
| 72  | Croatia .....                | 18.0 |  |
| 72  | Tajikistan .....             | 18.0 |  |
| 74  | Costa Rica .....             | 17.5 |  |
| 75  | Mali .....                   | 15.5 |  |
| 75  | Trinidad and Tobago .....    | 15.5 |  |
| 77  | Georgia .....                | 15.0 |  |
| 77  | Guatemala .....              | 15.0 |  |
| 77  | Tanzania .....               | 15.0 |  |
| 80  | Panama .....                 | 14.5 |  |
| 81  | Cameroon .....               | 14.0 |  |
| 81  | Latvia .....                 | 14.0 |  |
| 81  | Lithuania .....              | 14.0 |  |
| 84  | Kyrgyz Republic .....        | 13.5 |  |
| 85  | Algeria .....                | 13.0 |  |
| 86  | Mauritius .....              | 12.5 |  |
| 87  | Nepal .....                  | 12.0 |  |
| 88  | Barbados .....               | 11.5 |  |
| 88  | Estonia .....                | 11.5 |  |
| 88  | Uganda .....                 | 11.5 |  |
| 91  | Albania .....                | 11.0 |  |
| 91  | Benin .....                  | 11.0 |  |
| 91  | Zambia .....                 | 11.0 |  |
| 94  | Ethiopia .....               | 10.5 |  |
| 94  | Macedonia, FYR .....         | 10.5 |  |
| 94  | Zimbabwe .....               | 10.5 |  |
| 97  | Bolivia .....                | 10.0 |  |
| 97  | Bosnia and Herzegovina ..... | 10.0 |  |
| 97  | Luxembourg .....             | 10.0 |  |
| 97  | Malta .....                  | 10.0 |  |
| 97  | Uruguay .....                | 10.0 |  |
| 102 | Honduras .....               | 9.5  |  |
| 103 | Slovenia .....               | 9.0  |  |
| 104 | Mozambique .....             | 8.5  |  |
| 104 | Slovak Republic .....        | 8.5  |  |
| 106 | El Salvador .....            | 8.0  |  |
| 107 | Angola .....                 | 7.5  |  |
| 107 | Nicaragua .....              | 7.5  |  |
| 109 | Burkina Faso .....           | 7.0  |  |
| 110 | Moldova .....                | 6.5  |  |
| 111 | Madagascar .....             | 6.0  |  |
| 111 | Malawi .....                 | 6.0  |  |
| 111 | Mongolia .....               | 6.0  |  |
| 114 | Iceland .....                | 5.5  |  |
| 114 | Namibia .....                | 5.5  |  |
| 116 | Burundi .....                | 5.0  |  |
| 117 | Gambia .....                 | 4.5  |  |
| 117 | Guyana .....                 | 4.5  |  |
| 117 | Mauritania .....             | 4.5  |  |
| 120 | Paraguay .....               | 4.0  |  |
| 121 | Chad .....                   | 3.5  |  |
| 122 | Botswana .....               | 3.0  |  |
| 122 | Suriname .....               | 3.0  |  |
| 124 | Lesotho .....                | 1.0  |  |

SOURCE: International Air Transport Association, SRS Analyser

## 6.06 International air transport network

Does the air transport network in your country offer you good connections to the overseas markets that offer your business greatest potential? (1 = no, not at all, 7 = yes, to all of my key business markets)

| RANK | COUNTRY/ECONOMY      | SCORE | 1 | MEAN: 5.0 | 7 | SD  | RANK | COUNTRY/ECONOMY        | SCORE | 1 | MEAN: 5.0 | 7 | SD  |
|------|----------------------|-------|---|-----------|---|-----|------|------------------------|-------|---|-----------|---|-----|
| 1    | Germany              | 6.9   |   |           |   | 0.3 | 63   | Italy                  | 5.0   |   |           |   | 1.6 |
| 2    | Singapore            | 6.8   |   |           |   | 0.4 | 64   | Indonesia              | 5.0   |   |           |   | 1.1 |
| 3    | Netherlands          | 6.8   |   |           |   | 0.5 | 65   | Peru                   | 5.0   |   |           |   | 1.4 |
| 4    | United Kingdom       | 6.8   |   |           |   | 0.4 | 66   | Morocco                | 4.9   |   |           |   | 1.7 |
| 5    | Hong Kong SAR        | 6.7   |   |           |   | 0.8 | 67   | Sri Lanka              | 4.9   |   |           |   | 1.6 |
| 6    | United Arab Emirates | 6.6   |   |           |   | 0.7 | 68   | Egypt                  | 4.9   |   |           |   | 1.9 |
| 7    | France               | 6.6   |   |           |   | 0.7 | 69   | Trinidad and Tobago    | 4.9   |   |           |   | 1.5 |
| 8    | Denmark              | 6.6   |   |           |   | 0.6 | 70   | Namibia                | 4.9   |   |           |   | 1.5 |
| 9    | Finland              | 6.5   |   |           |   | 0.7 | 71   | Pakistan               | 4.8   |   |           |   | 1.6 |
| 10   | Iceland              | 6.4   |   |           |   | 0.7 | 72   | Venezuela              | 4.8   |   |           |   | 1.5 |
| 11   | Japan                | 6.4   |   |           |   | 0.8 | 73   | Azerbaijan             | 4.7   |   |           |   | 1.7 |
| 12   | Israel               | 6.3   |   |           |   | 0.8 | 74   | Russian Federation     | 4.7   |   |           |   | 1.7 |
| 13   | Canada               | 6.3   |   |           |   | 0.9 | 75   | Ethiopia               | 4.7   |   |           |   | 1.5 |
| 14   | United States        | 6.3   |   |           |   | 1.1 | 76   | Vietnam                | 4.7   |   |           |   | 1.5 |
| 15   | Switzerland          | 6.3   |   |           |   | 1.0 | 77   | Slovak Republic        | 4.7   |   |           |   | 1.5 |
| 16   | Chile                | 6.3   |   |           |   | 0.8 | 78   | Poland                 | 4.6   |   |           |   | 1.2 |
| 17   | South Africa         | 6.2   |   |           |   | 0.8 | 79   | Nicaragua              | 4.6   |   |           |   | 1.8 |
| 18   | Australia            | 6.2   |   |           |   | 0.9 | 80   | Cambodia               | 4.5   |   |           |   | 1.7 |
| 19   | New Zealand          | 6.2   |   |           |   | 1.0 | 81   | Tanzania               | 4.5   |   |           |   | 1.6 |
| 20   | Spain                | 6.1   |   |           |   | 0.9 | 82   | Romania                | 4.5   |   |           |   | 1.4 |
| 21   | Austria              | 6.1   |   |           |   | 1.2 | 83   | Kazakhstan             | 4.5   |   |           |   | 1.7 |
| 22   | Norway               | 6.1   |   |           |   | 0.9 | 84   | Ecuador                | 4.4   |   |           |   | 1.4 |
| 23   | Sweden               | 6.1   |   |           |   | 1.0 | 85   | Honduras               | 4.4   |   |           |   | 1.8 |
| 24   | Malaysia             | 6.1   |   |           |   | 1.1 | 86   | Croatia                | 4.3   |   |           |   | 1.5 |
| 25   | Jamaica              | 6.1   |   |           |   | 1.0 | 87   | Mauritania             | 4.3   |   |           |   | 1.4 |
| 26   | Panama               | 6.0   |   |           |   | 1.2 | 88   | Algeria                | 4.3   |   |           |   | 1.6 |
| 27   | Ireland              | 6.0   |   |           |   | 1.0 | 89   | China                  | 4.2   |   |           |   | 1.5 |
| 28   | Bahrain              | 6.0   |   |           |   | 1.0 | 90   | Uruguay                | 4.2   |   |           |   | 1.6 |
| 29   | Dominican Republic   | 6.0   |   |           |   | 1.1 | 91   | Nigeria                | 4.1   |   |           |   | 1.8 |
| 30   | El Salvador          | 6.0   |   |           |   | 1.2 | 92   | Botswana               | 4.0   |   |           |   | 1.5 |
| 31   | Belgium              | 5.9   |   |           |   | 1.4 | 93   | Mozambique             | 4.0   |   |           |   | 1.7 |
| 32   | Jordan               | 5.8   |   |           |   | 1.1 | 94   | Bangladesh             | 4.0   |   |           |   | 1.8 |
| 33   | Czech Republic       | 5.8   |   |           |   | 1.2 | 95   | Moldova                | 3.9   |   |           |   | 1.8 |
| 34   | India                | 5.8   |   |           |   | 1.2 | 96   | Georgia                | 3.9   |   |           |   | 1.6 |
| 35   | Portugal             | 5.8   |   |           |   | 1.1 | 97   | Paraguay               | 3.9   |   |           |   | 1.8 |
| 36   | Barbados             | 5.8   |   |           |   | 1.1 | 98   | Gambia                 | 3.9   |   |           |   | 1.7 |
| 37   | Korea, Rep.          | 5.8   |   |           |   | 1.1 | 99   | Bulgaria               | 3.8   |   |           |   | 1.6 |
| 38   | Mexico               | 5.7   |   |           |   | 1.1 | 100  | Uganda                 | 3.8   |   |           |   | 1.8 |
| 39   | Luxembourg           | 5.7   |   |           |   | 1.3 | 101  | Nepal                  | 3.8   |   |           |   | 1.6 |
| 40   | Greece               | 5.6   |   |           |   | 1.3 | 102  | Macedonia, FYR         | 3.7   |   |           |   | 1.7 |
| 41   | Thailand             | 5.6   |   |           |   | 1.0 | 103  | Guyana                 | 3.7   |   |           |   | 1.5 |
| 42   | Mauritius            | 5.6   |   |           |   | 1.0 | 104  | Albania                | 3.6   |   |           |   | 1.8 |
| 43   | Qatar                | 5.6   |   |           |   | 1.7 | 105  | Kyrgyz Republic        | 3.6   |   |           |   | 1.7 |
| 43   | Taiwan, China        | 5.6   |   |           |   | 1.1 | 105  | Mali                   | 3.6   |   |           |   | 1.9 |
| 45   | Hungary              | 5.5   |   |           |   | 1.3 | 107  | Armenia                | 3.6   |   |           |   | 1.6 |
| 46   | Costa Rica           | 5.5   |   |           |   | 1.2 | 108  | Malawi                 | 3.6   |   |           |   | 1.7 |
| 47   | Latvia               | 5.5   |   |           |   | 1.4 | 109  | Madagascar             | 3.6   |   |           |   | 1.5 |
| 48   | Cyprus               | 5.5   |   |           |   | 1.0 | 110  | Ukraine                | 3.6   |   |           |   | 1.7 |
| 49   | Turkey               | 5.4   |   |           |   | 1.4 | 111  | Tajikistan             | 3.5   |   |           |   | 2.1 |
| 50   | Colombia             | 5.3   |   |           |   | 1.3 | 112  | Serbia and Montenegro  | 3.5   |   |           |   | 1.6 |
| 51   | Brazil               | 5.3   |   |           |   | 1.6 | 113  | Angola                 | 3.5   |   |           |   | 1.6 |
| 52   | Malta                | 5.3   |   |           |   | 1.5 | 114  | Zimbabwe               | 3.5   |   |           |   | 1.6 |
| 53   | Estonia              | 5.3   |   |           |   | 1.4 | 115  | Mongolia               | 3.4   |   |           |   | 1.6 |
| 54   | Kuwait               | 5.2   |   |           |   | 1.7 | 116  | Cameroon               | 3.4   |   |           |   | 1.6 |
| 55   | Argentina            | 5.2   |   |           |   | 1.4 | 117  | Burkina Faso           | 3.3   |   |           |   | 1.8 |
| 56   | Zambia               | 5.2   |   |           |   | 1.3 | 118  | Bosnia and Herzegovina | 3.3   |   |           |   | 1.8 |
| 57   | Tunisia              | 5.1   |   |           |   | 1.2 | 119  | Bolivia                | 3.2   |   |           |   | 1.6 |
| 58   | Guatemala            | 5.1   |   |           |   | 1.5 | 120  | Benin                  | 3.0   |   |           |   | 1.6 |
| 59   | Kenya                | 5.1   |   |           |   | 1.6 | 121  | Lesotho                | 2.7   |   |           |   | 1.8 |
| 60   | Lithuania            | 5.1   |   |           |   | 1.3 | 122  | Suriname               | 2.7   |   |           |   | 1.5 |
| 61   | Slovenia             | 5.0   |   |           |   | 1.3 | 123  | Burundi                | 2.7   |   |           |   | 1.7 |
| 62   | Philippines          | 5.0   |   |           |   | 1.3 | 124  | Chad                   | 2.4   |   |           |   | 1.5 |

SOURCE: World Economic Forum, Executive Opinion Survey 2006



## Pillar 7

# Ground transport infrastructure

## 7.01 Road infrastructure

Roads in your country are (1 = underdeveloped, 7 = as extensive and efficient as the world's best)

| RANK | COUNTRY/ECONOMY      | SCORE | 1 | MEAN: 3.7 | 7 | SD  | RANK | COUNTRY/ECONOMY        | SCORE | 1 | MEAN: 3.7 | 7 | SD  |
|------|----------------------|-------|---|-----------|---|-----|------|------------------------|-------|---|-----------|---|-----|
| 1    | Singapore            | 6.7   |   |           |   | 0.5 | 63   | Azerbaijan             | 3.3   |   |           |   | 1.5 |
| 2    | France               | 6.6   |   |           |   | 0.6 | 64   | Egypt                  | 3.3   |   |           |   | 1.5 |
| 3    | Switzerland          | 6.6   |   |           |   | 0.6 | 65   | Argentina              | 3.3   |   |           |   | 1.1 |
| 4    | Germany              | 6.5   |   |           |   | 0.6 | 66   | India                  | 3.2   |   |           |   | 1.3 |
| 5    | Denmark              | 6.4   |   |           |   | 0.7 | 67   | Poland                 | 3.2   |   |           |   | 1.3 |
| 6    | Hong Kong SAR        | 6.3   |   |           |   | 1.0 | 68   | Armenia                | 3.2   |   |           |   | 1.4 |
| 7    | United States        | 6.1   |   |           |   | 1.2 | 69   | Macedonia, FYR         | 3.2   |   |           |   | 1.3 |
| 8    | Japan                | 6.1   |   |           |   | 1.1 | 70   | Zimbabwe               | 3.1   |   |           |   | 1.4 |
| 9    | Austria              | 6.0   |   |           |   | 1.0 | 71   | Trinidad and Tobago    | 3.1   |   |           |   | 1.5 |
| 10   | Belgium              | 6.0   |   |           |   | 1.1 | 72   | Bangladesh             | 3.1   |   |           |   | 1.3 |
| 11   | Netherlands          | 5.9   |   |           |   | 1.1 | 73   | Tanzania               | 3.1   |   |           |   | 1.5 |
| 12   | United Arab Emirates | 5.9   |   |           |   | 1.1 | 74   | Honduras               | 3.0   |   |           |   | 1.2 |
| 13   | Taiwan, China        | 5.9   |   |           |   | 0.9 | 75   | Gambia                 | 3.0   |   |           |   | 1.4 |
| 14   | United Kingdom       | 5.8   |   |           |   | 1.0 | 76   | Malta                  | 3.0   |   |           |   | 1.1 |
| 15   | Malaysia             | 5.7   |   |           |   | 1.1 | 77   | Cambodia               | 2.9   |   |           |   | 1.3 |
| 16   | Canada               | 5.7   |   |           |   | 1.0 | 78   | Guyana                 | 2.8   |   |           |   | 1.2 |
| 17   | Luxembourg           | 5.7   |   |           |   | 1.4 | 79   | Algeria                | 2.8   |   |           |   | 1.4 |
| 18   | Sweden               | 5.5   |   |           |   | 1.1 | 80   | Georgia                | 2.8   |   |           |   | 1.2 |
| 19   | Finland              | 5.5   |   |           |   | 1.0 | 81   | Sri Lanka              | 2.7   |   |           |   | 1.4 |
| 20   | Portugal             | 5.4   |   |           |   | 0.9 | 82   | Ecuador                | 2.7   |   |           |   | 1.0 |
| 21   | Spain                | 5.4   |   |           |   | 0.8 | 83   | Peru                   | 2.6   |   |           |   | 1.0 |
| 22   | Cyprus               | 5.3   |   |           |   | 1.1 | 84   | Malawi                 | 2.6   |   |           |   | 1.1 |
| 23   | Chile                | 5.3   |   |           |   | 0.8 | 85   | Uganda                 | 2.6   |   |           |   | 1.3 |
| 24   | Australia            | 5.2   |   |           |   | 1.2 | 86   | Philippines            | 2.6   |   |           |   | 1.2 |
| 25   | Korea, Rep.          | 5.2   |   |           |   | 1.1 | 87   | Colombia               | 2.6   |   |           |   | 1.1 |
| 26   | Israel               | 5.1   |   |           |   | 1.1 | 88   | Suriname               | 2.6   |   |           |   | 1.1 |
| 27   | Kuwait               | 5.0   |   |           |   | 1.5 | 89   | Mali                   | 2.5   |   |           |   | 1.1 |
| 28   | Thailand             | 5.0   |   |           |   | 0.8 | 90   | Benin                  | 2.5   |   |           |   | 1.3 |
| 29   | Bahrain              | 5.0   |   |           |   | 1.5 | 91   | Vietnam                | 2.5   |   |           |   | 1.0 |
| 29   | Iceland              | 5.0   |   |           |   | 1.0 | 92   | Nicaragua              | 2.4   |   |           |   | 1.0 |
| 31   | El Salvador          | 4.9   |   |           |   | 0.8 | 93   | Venezuela              | 2.4   |   |           |   | 0.9 |
| 32   | Lithuania            | 4.9   |   |           |   | 1.2 | 94   | Nigeria                | 2.4   |   |           |   | 1.3 |
| 33   | Jordan               | 4.9   |   |           |   | 1.1 | 95   | Madagascar             | 2.4   |   |           |   | 1.1 |
| 34   | South Africa         | 4.8   |   |           |   | 1.2 | 96   | Brazil                 | 2.4   |   |           |   | 1.2 |
| 35   | Namibia              | 4.8   |   |           |   | 1.3 | 97   | Bulgaria               | 2.3   |   |           |   | 1.2 |
| 36   | Tunisia              | 4.8   |   |           |   | 1.0 | 98   | Kazakhstan             | 2.3   |   |           |   | 1.2 |
| 37   | Croatia              | 4.7   |   |           |   | 1.3 | 99   | Ethiopia               | 2.3   |   |           |   | 1.1 |
| 38   | Norway               | 4.5   |   |           |   | 1.2 | 100  | Nepal                  | 2.2   |   |           |   | 1.0 |
| 39   | Barbados             | 4.5   |   |           |   | 1.4 | 101  | Kenya                  | 2.2   |   |           |   | 1.0 |
| 40   | Slovenia             | 4.4   |   |           |   | 1.3 | 102  | Lesotho                | 2.2   |   |           |   | 1.2 |
| 41   | New Zealand          | 4.4   |   |           |   | 1.4 | 103  | Russian Federation     | 2.2   |   |           |   | 1.2 |
| 42   | Greece               | 4.3   |   |           |   | 1.2 | 104  | Ukraine                | 2.2   |   |           |   | 1.3 |
| 43   | Mauritius            | 4.2   |   |           |   | 1.3 | 105  | Burkina Faso           | 2.2   |   |           |   | 1.1 |
| 44   | Italy                | 4.2   |   |           |   | 1.7 | 106  | Burundi                | 2.2   |   |           |   | 1.2 |
| 45   | China                | 4.0   |   |           |   | 1.5 | 107  | Zambia                 | 2.1   |   |           |   | 0.8 |
| 46   | Uruguay              | 4.0   |   |           |   | 1.3 | 108  | Costa Rica             | 2.1   |   |           |   | 1.1 |
| 47   | Panama               | 4.0   |   |           |   | 1.3 | 109  | Tajikistan             | 2.1   |   |           |   | 1.3 |
| 48   | Qatar                | 3.9   |   |           |   | 1.7 | 110  | Indonesia              | 2.1   |   |           |   | 1.0 |
| 49   | Mexico               | 3.8   |   |           |   | 1.1 | 111  | Romania                | 2.1   |   |           |   | 1.0 |
| 50   | Czech Republic       | 3.8   |   |           |   | 1.3 | 112  | Bolivia                | 2.0   |   |           |   | 0.8 |
| 51   | Dominican Republic   | 3.7   |   |           |   | 1.4 | 113  | Serbia and Montenegro  | 2.0   |   |           |   | 1.0 |
| 52   | Jamaica              | 3.7   |   |           |   | 1.3 | 114  | Albania                | 1.9   |   |           |   | 0.8 |
| 53   | Turkey               | 3.7   |   |           |   | 1.3 | 115  | Kyrgyz Republic        | 1.9   |   |           |   | 1.0 |
| 54   | Ireland              | 3.7   |   |           |   | 1.5 | 116  | Paraguay               | 1.9   |   |           |   | 1.0 |
| 55   | Botswana             | 3.7   |   |           |   | 1.4 | 117  | Mozambique             | 1.8   |   |           |   | 0.8 |
| 56   | Estonia              | 3.7   |   |           |   | 1.5 | 118  | Mongolia               | 1.8   |   |           |   | 1.0 |
| 57   | Guatemala            | 3.7   |   |           |   | 1.1 | 119  | Mauritania             | 1.8   |   |           |   | 1.0 |
| 57   | Slovak Republic      | 3.7   |   |           |   | 1.2 | 120  | Bosnia and Herzegovina | 1.8   |   |           |   | 0.9 |
| 59   | Hungary              | 3.6   |   |           |   | 1.3 | 121  | Cameroon               | 1.8   |   |           |   | 0.9 |
| 60   | Morocco              | 3.5   |   |           |   | 1.7 | 122  | Angola                 | 1.7   |   |           |   | 0.9 |
| 61   | Pakistan             | 3.5   |   |           |   | 1.3 | 123  | Moldova                | 1.6   |   |           |   | 0.9 |
| 62   | Latvia               | 3.4   |   |           |   | 1.4 | 124  | Chad                   | 1.4   |   |           |   | 0.6 |

SOURCE: World Economic Forum, Executive Opinion Survey 2006



## 7.02 Railroad infrastructure

Railroads in your country are (1 = underdeveloped, 7 = as extensive and efficient as the world's best)

| RANK | COUNTRY/ECONOMY          | SCORE | 1 | MEAN: 2.9 | 7 | SD  | RANK | COUNTRY/ECONOMY              | SCORE | 1 | MEAN: 2.9 | 7 | SD  |
|------|--------------------------|-------|---|-----------|---|-----|------|------------------------------|-------|---|-----------|---|-----|
| 1    | Switzerland .....        | 6.8   |   |           |   | 0.7 | 63   | Mongolia .....               | 2.5   |   |           |   | 1.2 |
| 2    | Japan .....              | 6.6   |   |           |   | 0.9 | 64   | Indonesia .....              | 2.4   |   |           |   | 0.7 |
| 3    | France .....             | 6.5   |   |           |   | 0.8 | 65   | Mexico .....                 | 2.4   |   |           |   | 1.1 |
| 4    | Germany .....            | 6.4   |   |           |   | 0.7 | 66   | Argentina .....              | 2.3   |   |           |   | 1.2 |
| 5    | Hong Kong SAR .....      | 6.3   |   |           |   | 1.1 | 67   | Turkey .....                 | 2.3   |   |           |   | 1.1 |
| 6    | Netherlands .....        | 5.9   |   |           |   | 1.0 | 68   | Bangladesh .....             | 2.3   |   |           |   | 1.0 |
| 7    | Belgium .....            | 5.7   |   |           |   | 1.2 | 69   | Macedonia, FYR .....         | 2.2   |   |           |   | 1.0 |
| 8    | Denmark .....            | 5.7   |   |           |   | 1.0 | 70   | Vietnam .....                | 2.2   |   |           |   | 1.1 |
| 9    | Singapore .....          | 5.7   |   |           |   | 1.3 | 71   | Malta .....                  | 2.2   |   |           |   | 1.5 |
| 10   | Finland .....            | 5.6   |   |           |   | 1.0 | 72   | Algeria .....                | 2.0   |   |           |   | 0.9 |
| 11   | Sweden .....             | 5.5   |   |           |   | 0.9 | 73   | United Arab Emirates .....   | 2.0   |   |           |   | 1.8 |
| 12   | Taiwan, China .....      | 5.4   |   |           |   | 0.9 | 74   | Kyrgyz Republic .....        | 2.0   |   |           |   | 1.1 |
| 13   | Korea, Rep. ....         | 5.2   |   |           |   | 1.0 | 75   | Jordan .....                 | 2.0   |   |           |   | 1.2 |
| 14   | Canada .....             | 5.2   |   |           |   | 1.3 | 76   | Armenia .....                | 2.0   |   |           |   | 1.1 |
| 15   | United States .....      | 5.1   |   |           |   | 1.5 | 77   | Burkina Faso .....           | 2.0   |   |           |   | 1.3 |
| 16   | Austria .....            | 5.0   |   |           |   | 1.3 | 78   | Kenya .....                  | 1.9   |   |           |   | 1.2 |
| 17   | Malaysia .....           | 5.0   |   |           |   | 1.3 | 79   | Kuwait .....                 | 1.9   |   |           |   | 1.5 |
| 18   | Spain .....              | 5.0   |   |           |   | 1.0 | 80   | Mauritania .....             | 1.8   |   |           |   | 1.2 |
| 19   | Luxembourg .....         | 4.9   |   |           |   | 1.7 | 81   | Brazil .....                 | 1.8   |   |           |   | 1.1 |
| 20   | United Kingdom .....     | 4.8   |   |           |   | 1.3 | 82   | Nigeria .....                | 1.8   |   |           |   | 1.2 |
| 21   | India .....              | 4.7   |   |           |   | 1.3 | 83   | Malawi .....                 | 1.8   |   |           |   | 0.9 |
| 22   | Australia .....          | 4.6   |   |           |   | 1.2 | 84   | Mozambique .....             | 1.8   |   |           |   | 0.9 |
| 23   | Slovak Republic .....    | 4.5   |   |           |   | 1.1 | 85   | Peru .....                   | 1.7   |   |           |   | 0.7 |
| 24   | Norway .....             | 4.4   |   |           |   | 1.2 | 86   | Philippines .....            | 1.7   |   |           |   | 1.1 |
| 25   | Tunisia .....            | 4.4   |   |           |   | 1.3 | 87   | Cameroon .....               | 1.7   |   |           |   | 0.8 |
| 26   | Portugal .....           | 4.2   |   |           |   | 1.1 | 88   | Mauritius .....              | 1.6   |   |           |   | 1.2 |
| 27   | Czech Republic .....     | 4.1   |   |           |   | 1.4 | 89   | Mali .....                   | 1.6   |   |           |   | 1.0 |
| 28   | Lithuania .....          | 4.0   |   |           |   | 1.3 | 90   | Bosnia and Herzegovina ..... | 1.6   |   |           |   | 0.7 |
| 29   | Latvia .....             | 4.0   |   |           |   | 1.5 | 91   | Serbia and Montenegro .....  | 1.6   |   |           |   | 0.8 |
| 30   | Russian Federation ..... | 3.9   |   |           |   | 1.6 | 92   | Bahrain .....                | 1.6   |   |           |   | 1.2 |
| 31   | Israel .....             | 3.8   |   |           |   | 1.3 | 93   | Zambia .....                 | 1.6   |   |           |   | 0.7 |
| 32   | Ukraine .....            | 3.8   |   |           |   | 1.4 | 94   | Bolivia .....                | 1.6   |   |           |   | 0.8 |
| 33   | China .....              | 3.8   |   |           |   | 1.4 | 95   | Uruguay .....                | 1.6   |   |           |   | 0.6 |
| 34   | Azerbaijan .....         | 3.8   |   |           |   | 1.4 | 96   | Barbados .....               | 1.5   |   |           |   | 1.2 |
| 35   | Namibia .....            | 3.7   |   |           |   | 1.5 | 97   | Cambodia .....               | 1.5   |   |           |   | 0.8 |
| 36   | Estonia .....            | 3.7   |   |           |   | 1.4 | 98   | Angola .....                 | 1.5   |   |           |   | 0.7 |
| 37   | New Zealand .....        | 3.7   |   |           |   | 1.4 | 98   | Iceland .....                | 1.5   |   |           |   | 1.2 |
| 38   | Poland .....             | 3.7   |   |           |   | 1.1 | 100  | Suriname .....               | 1.5   |   |           |   | 1.3 |
| 39   | Pakistan .....           | 3.6   |   |           |   | 1.2 | 101  | Uganda .....                 | 1.5   |   |           |   | 0.7 |
| 40   | Thailand .....           | 3.6   |   |           |   | 1.1 | 102  | Madagascar .....             | 1.5   |   |           |   | 0.8 |
| 41   | Slovenia .....           | 3.6   |   |           |   | 1.4 | 103  | Lesotho .....                | 1.4   |   |           |   | 1.0 |
| 42   | Hungary .....            | 3.6   |   |           |   | 1.1 | 104  | Guyana .....                 | 1.4   |   |           |   | 1.0 |
| 43   | South Africa .....       | 3.5   |   |           |   | 1.3 | 105  | Costa Rica .....             | 1.4   |   |           |   | 0.9 |
| 44   | Greece .....             | 3.4   |   |           |   | 1.2 | 106  | Chad .....                   | 1.4   |   |           |   | 1.0 |
| 45   | Bulgaria .....           | 3.3   |   |           |   | 1.5 | 107  | Colombia .....               | 1.4   |   |           |   | 0.6 |
| 46   | Kazakhstan .....         | 3.3   |   |           |   | 1.4 | 108  | Venezuela .....              | 1.4   |   |           |   | 0.8 |
| 47   | Egypt .....              | 3.3   |   |           |   | 1.6 | 109  | Jamaica .....                | 1.3   |   |           |   | 0.9 |
| 48   | Botswana .....           | 3.3   |   |           |   | 1.2 | 110  | Ethiopia .....               | 1.3   |   |           |   | 0.6 |
| 49   | Italy .....              | 3.2   |   |           |   | 1.6 | 111  | Benin .....                  | 1.3   |   |           |   | 0.7 |
| 50   | Morocco .....            | 3.1   |   |           |   | 1.6 | 112  | Guatemala .....              | 1.3   |   |           |   | 0.6 |
| 51   | Croatia .....            | 3.0   |   |           |   | 1.3 | 113  | Gambia .....                 | 1.3   |   |           |   | 1.2 |
| 52   | Georgia .....            | 3.0   |   |           |   | 1.2 | 114  | El Salvador .....            | 1.3   |   |           |   | 0.8 |
| 53   | Ireland .....            | 2.9   |   |           |   | 1.3 | 115  | Albania .....                | 1.2   |   |           |   | 0.6 |
| 54   | Romania .....            | 2.9   |   |           |   | 1.4 | 116  | Dominican Republic .....     | 1.2   |   |           |   | 0.8 |
| 55   | Tajikistan .....         | 2.8   |   |           |   | 1.6 | 117  | Burundi .....                | 1.2   |   |           |   | 0.8 |
| 56   | Tanzania .....           | 2.8   |   |           |   | 1.5 | 118  | Trinidad and Tobago .....    | 1.2   |   |           |   | 0.7 |
| 57   | Zimbabwe .....           | 2.7   |   |           |   | 1.3 | 119  | Nepal .....                  | 1.2   |   |           |   | 0.6 |
| 58   | Chile .....              | 2.7   |   |           |   | 1.3 | 120  | Ecuador .....                | 1.1   |   |           |   | 0.5 |
| 59   | Moldova .....            | 2.6   |   |           |   | 1.2 | 121  | Honduras .....               | 1.1   |   |           |   | 0.4 |
| 60   | Qatar .....              | 2.6   |   |           |   | 2.2 | 122  | Nicaragua .....              | 1.1   |   |           |   | 0.6 |
| 61   | Sri Lanka .....          | 2.5   |   |           |   | 1.5 | 123  | Paraguay .....               | 1.0   |   |           |   | 0.3 |
| 62   | Panama .....             | 2.5   |   |           |   | 1.5 | 124  | Cyprus .....                 | 1.0   |   |           |   | n/a |

SOURCE: World Economic Forum, Executive Opinion Survey 2006

## 7.03 Port infrastructure

Port facilities and inland waterways in your country are (1 = underdeveloped, 7 = as developed as the world's best)

| RANK | COUNTRY/ECONOMY      | SCORE | 1 | MEAN: 3.7 | 7 | SD  | RANK | COUNTRY/ECONOMY        | SCORE | 1 | MEAN: 3.7 | 7 | SD  |
|------|----------------------|-------|---|-----------|---|-----|------|------------------------|-------|---|-----------|---|-----|
| 1    | Singapore            | 6.9   |   |           |   | 0.4 | 63   | Argentina              | 3.4   |   |           |   | 1.3 |
| 2    | Netherlands          | 6.7   |   |           |   | 0.6 | 64   | Mexico                 | 3.4   |   |           |   | 1.2 |
| 3    | Hong Kong SAR        | 6.6   |   |           |   | 0.8 | 65   | Russian Federation     | 3.4   |   |           |   | 1.4 |
| 4    | Germany              | 6.6   |   |           |   | 0.6 | 66   | Ukraine                | 3.4   |   |           |   | 1.3 |
| 5    | Belgium              | 6.4   |   |           |   | 0.9 | 67   | Czech Republic         | 3.4   |   |           |   | 1.2 |
| 6    | Denmark              | 6.3   |   |           |   | 0.8 | 68   | Tanzania               | 3.4   |   |           |   | 1.6 |
| 7    | Finland              | 6.2   |   |           |   | 0.7 | 69   | Cambodia               | 3.3   |   |           |   | 1.4 |
| 8    | Japan                | 6.0   |   |           |   | 0.8 | 70   | Georgia                | 3.3   |   |           |   | 1.3 |
| 9    | United Arab Emirates | 6.0   |   |           |   | 1.3 | 71   | Bulgaria               | 3.3   |   |           |   | 1.5 |
| 10   | France               | 6.0   |   |           |   | 1.2 | 72   | Croatia                | 3.3   |   |           |   | 1.3 |
| 11   | Iceland              | 5.8   |   |           |   | 1.0 | 73   | Slovak Republic        | 3.3   |   |           |   | 1.3 |
| 12   | Sweden               | 5.8   |   |           |   | 0.9 | 74   | Kenya                  | 3.2   |   |           |   | 1.4 |
| 13   | Malaysia             | 5.8   |   |           |   | 0.9 | 75   | Romania                | 3.1   |   |           |   | 1.3 |
| 14   | Panama               | 5.7   |   |           |   | 1.4 | 76   | Turkey                 | 3.1   |   |           |   | 1.3 |
| 15   | United States        | 5.7   |   |           |   | 1.3 | 77   | Italy                  | 3.1   |   |           |   | 1.6 |
| 16   | Canada               | 5.6   |   |           |   | 1.0 | 78   | Algeria                | 3.1   |   |           |   | 1.3 |
| 17   | Norway               | 5.6   |   |           |   | 0.9 | 79   | Trinidad and Tobago    | 3.1   |   |           |   | 1.6 |
| 18   | New Zealand          | 5.5   |   |           |   | 1.2 | 80   | Hungary                | 3.0   |   |           |   | 1.2 |
| 19   | United Kingdom       | 5.4   |   |           |   | 1.1 | 81   | Zimbabwe               | 3.0   |   |           |   | 1.5 |
| 20   | Taiwan, China        | 5.4   |   |           |   | 1.0 | 82   | Colombia               | 2.9   |   |           |   | 1.3 |
| 21   | Switzerland          | 5.4   |   |           |   | 1.4 | 83   | Nigeria                | 2.8   |   |           |   | 1.5 |
| 22   | Barbados             | 5.4   |   |           |   | 1.1 | 84   | Ecuador                | 2.8   |   |           |   | 1.0 |
| 23   | Spain                | 5.3   |   |           |   | 1.0 | 85   | Venezuela              | 2.7   |   |           |   | 1.2 |
| 24   | Jamaica              | 5.3   |   |           |   | 1.3 | 86   | Botswana               | 2.7   |   |           |   | 1.4 |
| 25   | Estonia              | 5.3   |   |           |   | 1.1 | 87   | Philippines            | 2.7   |   |           |   | 1.3 |
| 26   | Bahrain              | 5.3   |   |           |   | 1.1 | 88   | Brazil                 | 2.7   |   |           |   | 1.4 |
| 27   | Korea, Rep.          | 5.2   |   |           |   | 1.0 | 89   | Vietnam                | 2.7   |   |           |   | 1.0 |
| 28   | Australia            | 5.1   |   |           |   | 1.1 | 90   | Kazakhstan             | 2.6   |   |           |   | 1.2 |
| 29   | Namibia              | 5.0   |   |           |   | 1.1 | 91   | Mozambique             | 2.6   |   |           |   | 1.2 |
| 30   | Israel               | 4.9   |   |           |   | 1.4 | 92   | Guyana                 | 2.5   |   |           |   | 1.3 |
| 31   | Chile                | 4.9   |   |           |   | 1.1 | 93   | Suriname               | 2.5   |   |           |   | 1.0 |
| 32   | Cyprus               | 4.8   |   |           |   | 1.3 | 94   | Paraguay               | 2.5   |   |           |   | 1.3 |
| 32   | Mauritius            | 4.8   |   |           |   | 0.9 | 95   | Benin                  | 2.5   |   |           |   | 1.2 |
| 34   | Tunisia              | 4.8   |   |           |   | 1.1 | 96   | Angola                 | 2.5   |   |           |   | 1.1 |
| 35   | Malta                | 4.7   |   |           |   | 1.2 | 97   | Indonesia              | 2.4   |   |           |   | 0.8 |
| 36   | Portugal             | 4.7   |   |           |   | 1.2 | 98   | Bangladesh             | 2.4   |   |           |   | 1.2 |
| 37   | Thailand             | 4.7   |   |           |   | 1.1 | 99   | Mauritania             | 2.4   |   |           |   | 1.4 |
| 38   | Austria              | 4.6   |   |           |   | 1.3 | 100  | Nicaragua              | 2.3   |   |           |   | 1.3 |
| 39   | Latvia               | 4.6   |   |           |   | 1.5 | 101  | Madagascar             | 2.3   |   |           |   | 1.1 |
| 40   | Luxembourg           | 4.6   |   |           |   | 1.3 | 102  | Costa Rica             | 2.3   |   |           |   | 1.0 |
| 41   | Greece               | 4.6   |   |           |   | 1.2 | 103  | Cameroon               | 2.2   |   |           |   | 1.1 |
| 42   | Qatar                | 4.5   |   |           |   | 1.5 | 104  | Serbia and Montenegro  | 2.2   |   |           |   | 1.1 |
| 43   | South Africa         | 4.4   |   |           |   | 1.2 | 105  | Peru                   | 2.2   |   |           |   | 0.9 |
| 44   | Slovenia             | 4.4   |   |           |   | 1.6 | 106  | Albania                | 2.0   |   |           |   | 1.1 |
| 45   | Honduras             | 4.3   |   |           |   | 1.6 | 107  | Burundi                | 1.9   |   |           |   | 1.3 |
| 46   | Uruguay              | 4.3   |   |           |   | 1.4 | 108  | Lesotho                | 1.9   |   |           |   | 1.5 |
| 47   | Kuwait               | 4.2   |   |           |   | 1.5 | 109  | Uganda                 | 1.9   |   |           |   | 1.0 |
| 48   | Ireland              | 4.2   |   |           |   | 1.4 | 110  | Zambia                 | 1.9   |   |           |   | 0.9 |
| 49   | Jordan               | 4.0   |   |           |   | 1.3 | 111  | Burkina Faso           | 1.8   |   |           |   | 1.5 |
| 50   | Lithuania            | 4.0   |   |           |   | 1.3 | 112  | Macedonia, FYR         | 1.8   |   |           |   | 1.2 |
| 51   | Gambia               | 3.9   |   |           |   | 1.6 | 113  | Malawi                 | 1.7   |   |           |   | 0.9 |
| 52   | Pakistan             | 3.8   |   |           |   | 1.3 | 114  | Mongolia               | 1.6   |   |           |   | 0.9 |
| 53   | Morocco              | 3.8   |   |           |   | 1.6 | 115  | Tajikistan             | 1.6   |   |           |   | 0.9 |
| 54   | Dominican Republic   | 3.7   |   |           |   | 1.5 | 116  | Bosnia and Herzegovina | 1.5   |   |           |   | 0.9 |
| 55   | China                | 3.7   |   |           |   | 1.3 | 117  | Kyrgyz Republic        | 1.5   |   |           |   | 1.0 |
| 56   | Sri Lanka            | 3.7   |   |           |   | 1.7 | 118  | Moldova                | 1.5   |   |           |   | 1.1 |
| 57   | El Salvador          | 3.6   |   |           |   | 1.6 | 119  | Chad                   | 1.4   |   |           |   | 1.0 |
| 58   | Azerbaijan           | 3.6   |   |           |   | 1.5 | 120  | Ethiopia               | 1.4   |   |           |   | 0.8 |
| 59   | Guatemala            | 3.5   |   |           |   | 1.4 | 121  | Mali                   | 1.4   |   |           |   | 0.7 |
| 60   | Poland               | 3.5   |   |           |   | 1.2 | 122  | Nepal                  | 1.3   |   |           |   | 0.8 |
| 61   | Egypt                | 3.5   |   |           |   | 1.6 | 123  | Bolivia                | 1.3   |   |           |   | 0.7 |
| 61   | India                | 3.5   |   |           |   | 1.4 | 124  | Armenia                | 1.1   |   |           |   | 0.5 |

SOURCE: World Economic Forum, Executive Opinion Survey 2006

## 7.04 Domestic transport network

Does your country's national transport network (domestic flights, buses, trains, taxis, etc.) offer efficient, accessible transportation to a wide range of travelers to key business centers and tourist attractions within your country? (1 = no, not at all, 7 = yes, it is equal to the best in the world)

| RANK | COUNTRY/ECONOMY            | SCORE | 1 | MEAN: 4.6 | 7 | SD  | RANK | COUNTRY/ECONOMY              | SCORE | 1 | MEAN: 4.6 | 7 | SD  |
|------|----------------------------|-------|---|-----------|---|-----|------|------------------------------|-------|---|-----------|---|-----|
| 1    | Germany .....              | 6.8   |   |           |   | 0.4 | 63   | Macedonia, FYR .....         | 4.5   |   |           |   | 1.7 |
| 2    | Switzerland .....          | 6.7   |   |           |   | 0.7 | 64   | China .....                  | 4.5   |   |           |   | 1.3 |
| 3    | Hong Kong SAR .....        | 6.7   |   |           |   | 0.7 | 65   | Pakistan .....               | 4.4   |   |           |   | 1.5 |
| 4    | France .....               | 6.6   |   |           |   | 0.7 | 66   | Bulgaria .....               | 4.4   |   |           |   | 1.4 |
| 5    | Singapore .....            | 6.6   |   |           |   | 0.6 | 67   | Namibia .....                | 4.3   |   |           |   | 1.4 |
| 6    | Japan .....                | 6.6   |   |           |   | 0.8 | 68   | Tanzania .....               | 4.3   |   |           |   | 1.6 |
| 7    | Denmark .....              | 6.4   |   |           |   | 0.7 | 69   | Uruguay .....                | 4.3   |   |           |   | 1.5 |
| 8    | Netherlands .....          | 6.3   |   |           |   | 0.9 | 70   | El Salvador .....            | 4.3   |   |           |   | 1.4 |
| 9    | Finland .....              | 6.3   |   |           |   | 0.9 | 71   | Botswana .....               | 4.3   |   |           |   | 1.3 |
| 10   | Austria .....              | 6.2   |   |           |   | 1.0 | 72   | Kyrgyz Republic .....        | 4.3   |   |           |   | 1.4 |
| 11   | United States .....        | 6.2   |   |           |   | 1.1 | 73   | Kenya .....                  | 4.2   |   |           |   | 1.2 |
| 12   | Sweden .....               | 6.2   |   |           |   | 0.6 | 74   | Indonesia .....              | 4.2   |   |           |   | 1.0 |
| 13   | Canada .....               | 6.1   |   |           |   | 1.0 | 75   | Cyprus .....                 | 4.2   |   |           |   | 1.6 |
| 14   | Iceland .....              | 6.1   |   |           |   | 0.9 | 76   | Ukraine .....                | 4.2   |   |           |   | 1.4 |
| 15   | Belgium .....              | 6.1   |   |           |   | 1.0 | 77   | Vietnam .....                | 4.2   |   |           |   | 1.3 |
| 16   | United Kingdom .....       | 6.1   |   |           |   | 0.9 | 78   | Nigeria .....                | 4.2   |   |           |   | 1.6 |
| 17   | Spain .....                | 6.0   |   |           |   | 0.9 | 79   | Mali .....                   | 4.1   |   |           |   | 1.7 |
| 18   | Taiwan, China .....        | 5.9   |   |           |   | 0.9 | 80   | Dominican Republic .....     | 4.1   |   |           |   | 1.6 |
| 19   | Israel .....               | 5.9   |   |           |   | 1.3 | 81   | Algeria .....                | 4.1   |   |           |   | 1.6 |
| 20   | Norway .....               | 5.9   |   |           |   | 0.9 | 82   | Poland .....                 | 4.0   |   |           |   | 1.1 |
| 21   | Australia .....            | 5.8   |   |           |   | 1.1 | 83   | Romania .....                | 4.0   |   |           |   | 1.3 |
| 22   | Czech Republic .....       | 5.8   |   |           |   | 1.1 | 84   | Cambodia .....               | 4.0   |   |           |   | 1.4 |
| 23   | Malaysia .....             | 5.8   |   |           |   | 1.0 | 85   | Guatemala .....              | 4.0   |   |           |   | 1.3 |
| 24   | New Zealand .....          | 5.7   |   |           |   | 1.2 | 86   | Armenia .....                | 3.9   |   |           |   | 1.7 |
| 25   | Portugal .....             | 5.6   |   |           |   | 1.2 | 87   | Panama .....                 | 3.9   |   |           |   | 1.6 |
| 26   | Chile .....                | 5.6   |   |           |   | 1.0 | 88   | Uganda .....                 | 3.9   |   |           |   | 1.6 |
| 27   | Korea, Rep. ....           | 5.6   |   |           |   | 1.1 | 89   | Honduras .....               | 3.9   |   |           |   | 1.6 |
| 28   | Turkey .....               | 5.5   |   |           |   | 1.2 | 90   | Venezuela .....              | 3.8   |   |           |   | 1.4 |
| 29   | Greece .....               | 5.4   |   |           |   | 1.1 | 91   | Mauritania .....             | 3.8   |   |           |   | 1.2 |
| 30   | United Arab Emirates ..... | 5.4   |   |           |   | 1.6 | 92   | Philippines .....            | 3.8   |   |           |   | 1.5 |
| 31   | Thailand .....             | 5.4   |   |           |   | 0.7 | 93   | Peru .....                   | 3.8   |   |           |   | 1.3 |
| 32   | India .....                | 5.3   |   |           |   | 1.2 | 94   | Tajikistan .....             | 3.8   |   |           |   | 1.9 |
| 33   | Estonia .....              | 5.3   |   |           |   | 1.3 | 95   | Serbia and Montenegro .....  | 3.8   |   |           |   | 1.4 |
| 34   | Luxembourg .....           | 5.2   |   |           |   | 1.6 | 96   | Moldova .....                | 3.8   |   |           |   | 1.7 |
| 35   | Barbados .....             | 5.2   |   |           |   | 1.4 | 97   | Burkina Faso .....           | 3.8   |   |           |   | 1.6 |
| 36   | Latvia .....               | 5.2   |   |           |   | 1.3 | 98   | Trinidad and Tobago .....    | 3.7   |   |           |   | 1.6 |
| 37   | Tunisia .....              | 5.1   |   |           |   | 1.0 | 99   | Nepal .....                  | 3.7   |   |           |   | 1.5 |
| 38   | Bahrain .....              | 5.0   |   |           |   | 1.5 | 100  | Ecuador .....                | 3.7   |   |           |   | 1.2 |
| 39   | Lithuania .....            | 5.0   |   |           |   | 1.1 | 101  | Benin .....                  | 3.6   |   |           |   | 1.5 |
| 40   | Brazil .....               | 4.9   |   |           |   | 1.4 | 102  | Gambia .....                 | 3.6   |   |           |   | 1.6 |
| 41   | Kuwait .....               | 4.9   |   |           |   | 1.5 | 103  | Guyana .....                 | 3.6   |   |           |   | 1.4 |
| 42   | Jordan .....               | 4.9   |   |           |   | 1.4 | 104  | Bosnia and Herzegovina ..... | 3.6   |   |           |   | 1.5 |
| 43   | Croatia .....              | 4.9   |   |           |   | 1.4 | 105  | Sri Lanka .....              | 3.5   |   |           |   | 1.6 |
| 44   | Egypt .....                | 4.8   |   |           |   | 1.6 | 106  | Mongolia .....               | 3.5   |   |           |   | 1.4 |
| 45   | Azerbaijan .....           | 4.8   |   |           |   | 1.3 | 107  | Bangladesh .....             | 3.5   |   |           |   | 1.5 |
| 46   | Hungary .....              | 4.8   |   |           |   | 1.4 | 108  | Madagascar .....             | 3.4   |   |           |   | 1.3 |
| 47   | Slovenia .....             | 4.8   |   |           |   | 1.3 | 109  | Mozambique .....             | 3.3   |   |           |   | 1.4 |
| 48   | Mexico .....               | 4.8   |   |           |   | 1.2 | 110  | Suriname .....               | 3.3   |   |           |   | 1.5 |
| 49   | Qatar .....                | 4.7   |   |           |   | 1.5 | 111  | Ethiopia .....               | 3.3   |   |           |   | 1.5 |
| 50   | Morocco .....              | 4.6   |   |           |   | 1.5 | 112  | Georgia .....                | 3.2   |   |           |   | 1.5 |
| 51   | Malta .....                | 4.6   |   |           |   | 1.5 | 113  | Malawi .....                 | 3.2   |   |           |   | 1.3 |
| 52   | Italy .....                | 4.6   |   |           |   | 1.5 | 114  | Cameroon .....               | 3.1   |   |           |   | 1.4 |
| 53   | Jamaica .....              | 4.6   |   |           |   | 1.4 | 115  | Nicaragua .....              | 3.1   |   |           |   | 1.4 |
| 54   | Russian Federation .....   | 4.6   |   |           |   | 1.4 | 116  | Burundi .....                | 3.1   |   |           |   | 1.6 |
| 55   | Ireland .....              | 4.6   |   |           |   | 1.5 | 117  | Bolivia .....                | 3.0   |   |           |   | 1.3 |
| 56   | South Africa .....         | 4.6   |   |           |   | 1.7 | 118  | Zimbabwe .....               | 2.9   |   |           |   | 1.2 |
| 57   | Slovak Republic .....      | 4.6   |   |           |   | 1.2 | 119  | Lesotho .....                | 2.9   |   |           |   | 1.4 |
| 58   | Argentina .....            | 4.5   |   |           |   | 1.5 | 120  | Paraguay .....               | 2.7   |   |           |   | 1.4 |
| 59   | Kazakhstan .....           | 4.5   |   |           |   | 1.5 | 121  | Albania .....                | 2.6   |   |           |   | 1.3 |
| 60   | Mauritius .....            | 4.5   |   |           |   | 1.4 | 122  | Chad .....                   | 2.3   |   |           |   | 1.5 |
| 61   | Costa Rica .....           | 4.5   |   |           |   | 1.4 | 123  | Angola .....                 | 2.3   |   |           |   | 1.0 |
| 62   | Colombia .....             | 4.5   |   |           |   | 1.3 | 124  | Zambia .....                 | 2.0   |   |           |   | 1.6 |

SOURCE: World Economic Forum, Executive Opinion Survey 2006



## Pillar 8

# Tourism infrastructure

## 8.01 Hotel rooms

Number of hotel rooms per 100 population, 2004 or most recent year available

RANK COUNTRY/ECONOMY HARD DATA

|    |                             |     |  |
|----|-----------------------------|-----|--|
| 1  | Cyprus .....                | 5.5 |  |
| 2  | Malta .....                 | 5.0 |  |
| 3  | Austria .....               | 3.6 |  |
| 4  | Greece .....                | 3.2 |  |
| 5  | Iceland .....               | 2.6 |  |
| 6  | Barbados .....              | 2.2 |  |
| 7  | Switzerland .....           | 1.9 |  |
| 8  | Spain .....                 | 1.8 |  |
| 9  | Croatia .....               | 1.8 |  |
| 10 | Italy .....                 | 1.8 |  |
| 11 | Luxembourg .....            | 1.6 |  |
| 12 | Ireland .....               | 1.5 |  |
| 13 | United States .....         | 1.5 |  |
| 14 | Norway .....                | 1.4 |  |
| 15 | Japan .....                 | 1.2 |  |
| 16 | Canada .....                | 1.2 |  |
| 17 | Tunisia .....               | 1.1 |  |
| 18 | Bahrain .....               | 1.1 |  |
| 19 | Estonia .....               | 1.1 |  |
| 20 | Bulgaria .....              | 1.1 |  |
| 21 | Sweden .....                | 1.1 |  |
| 22 | Germany .....               | 1.1 |  |
| 23 | Finland .....               | 1.0 |  |
| 24 | Australia .....             | 1.0 |  |
| 25 | United Kingdom .....        | 1.0 |  |
| 26 | France .....                | 1.0 |  |
| 27 | Portugal .....              | 1.0 |  |
| 28 | Czech Republic .....        | 1.0 |  |
| 29 | United Arab Emirates .....  | 1.0 |  |
| 30 | Singapore .....             | 0.9 |  |
| 31 | Mauritius .....             | 0.9 |  |
| 32 | Costa Rica .....            | 0.9 |  |
| 33 | Jamaica .....               | 0.8 |  |
| 34 | Denmark .....               | 0.8 |  |
| 35 | Slovenia .....              | 0.8 |  |
| 36 | Israel .....                | 0.7 |  |
| 37 | Dominican Republic .....    | 0.7 |  |
| 38 | Slovak Republic .....       | 0.7 |  |
| 39 | Hong Kong SAR .....         | 0.6 |  |
| 40 | Hungary .....               | 0.6 |  |
| 41 | Belgium .....               | 0.6 |  |
| 42 | Malaysia .....              | 0.6 |  |
| 43 | Netherlands .....           | 0.6 |  |
| 44 | Thailand .....              | 0.6 |  |
| 45 | Uruguay .....               | 0.6 |  |
| 46 | New Zealand .....           | 0.5 |  |
| 47 | Mexico .....                | 0.5 |  |
| 48 | Qatar .....                 | 0.5 |  |
| 49 | Serbia and Montenegro ..... | 0.5 |  |
| 50 | Panama .....                | 0.5 |  |
| 51 | Romania .....               | 0.5 |  |
| 52 | Peru .....                  | 0.5 |  |
| 53 | Argentina .....             | 0.5 |  |
| 54 | Trinidad and Tobago .....   | 0.5 |  |
| 55 | Latvia .....                | 0.4 |  |
| 56 | Jordan .....                | 0.4 |  |
| 57 | Macedonia, FYR .....        | 0.3 |  |
| 58 | Chile .....                 | 0.3 |  |
| 59 | Venezuela .....             | 0.3 |  |
| 60 | Ecuador .....               | 0.3 |  |
| 61 | Turkey .....                | 0.3 |  |
| 62 | Suriname .....              | 0.3 |  |

RANK COUNTRY/ECONOMY HARD DATA

|     |                              |     |  |
|-----|------------------------------|-----|--|
| 63  | Honduras .....               | 0.3 |  |
| 64  | Lithuania .....              | 0.3 |  |
| 65  | Morocco .....                | 0.3 |  |
| 66  | Armenia .....                | 0.2 |  |
| 67  | Bolivia .....                | 0.2 |  |
| 68  | Poland .....                 | 0.2 |  |
| 69  | Georgia .....                | 0.2 |  |
| 70  | Egypt .....                  | 0.2 |  |
| 71  | Botswana .....               | 0.2 |  |
| 72  | Kuwait .....                 | 0.2 |  |
| 73  | Malawi .....                 | 0.2 |  |
| 74  | Guatemala .....              | 0.1 |  |
| 75  | Namibia .....                | 0.1 |  |
| 76  | Albania .....                | 0.1 |  |
| 77  | Algeria .....                | 0.1 |  |
| 78  | Colombia .....               | 0.1 |  |
| 79  | Indonesia .....              | 0.1 |  |
| 80  | Korea, Rep. ....             | 0.1 |  |
| 81  | Russian Federation .....     | 0.1 |  |
| 82  | Azerbaijan .....             | 0.1 |  |
| 83  | Bosnia and Herzegovina ..... | 0.1 |  |
| 84  | South Africa .....           | 0.1 |  |
| 85  | Guyana .....                 | 0.1 |  |
| 86  | Taiwan, China .....          | 0.1 |  |
| 87  | China .....                  | 0.1 |  |
| 88  | Vietnam .....                | 0.1 |  |
| 89  | Sri Lanka .....              | 0.1 |  |
| 90  | Nicaragua .....              | 0.1 |  |
| 91  | Cambodia .....               | 0.1 |  |
| 92  | Lesotho .....                | 0.1 |  |
| 93  | Tanzania .....               | 0.1 |  |
| 94  | Paraguay .....               | 0.1 |  |
| 95  | Kazakhstan .....             | 0.1 |  |
| 96  | Nepal .....                  | 0.1 |  |
| 97  | Uganda .....                 | 0.1 |  |
| 98  | El Salvador .....            | 0.1 |  |
| 99  | Ukraine .....                | 0.1 |  |
| 100 | Moldova .....                | 0.1 |  |
| 101 | Angola .....                 | 0.1 |  |
| 102 | Madagascar .....             | 0.1 |  |
| 103 | Zambia .....                 | 0.0 |  |
| 104 | Zimbabwe .....               | 0.0 |  |
| 105 | Kyrgyz Republic .....        | 0.0 |  |
| 106 | Philippines .....            | 0.0 |  |
| 107 | Mali .....                   | 0.0 |  |
| 108 | Mozambique .....             | 0.0 |  |
| 109 | Benin .....                  | 0.0 |  |
| 110 | Pakistan .....               | 0.0 |  |
| 111 | Nigeria .....                | 0.0 |  |
| 112 | Chad .....                   | 0.0 |  |
| 113 | India .....                  | 0.0 |  |
| 114 | Tajikistan .....             | 0.0 |  |
| 115 | Ethiopia .....               | 0.0 |  |
| 116 | Bangladesh .....             | 0.0 |  |
| n/a | Brazil .....                 | n/a |  |
| n/a | Burkina Faso .....           | n/a |  |
| n/a | Burundi .....                | n/a |  |
| n/a | Cameroon .....               | n/a |  |
| n/a | Gambia .....                 | n/a |  |
| n/a | Kenya .....                  | n/a |  |
| n/a | Mauritania .....             | n/a |  |
| n/a | Mongolia .....               | n/a |  |

SOURCE: United Nations World Tourism Organization; Economist Intelligence Unit

## 8.02 Presence of major car rental companies

Index of presence of major car rental companies, 2006

| RANK | COUNTRY/ECONOMY             | HARD DATA | RANK | COUNTRY/ECONOMY          | HARD DATA |
|------|-----------------------------|-----------|------|--------------------------|-----------|
| 1    | Australia.....              | 7.0       | 55   | Thailand .....           | 5.0       |
| 1    | Austria .....               | 7.0       | 55   | Tunisia .....            | 5.0       |
| 1    | Belgium .....               | 7.0       | 55   | Venezuela .....          | 5.0       |
| 1    | Bosnia and Herzegovina..... | 7.0       | 66   | Albania.....             | 4.0       |
| 1    | Brazil.....                 | 7.0       | 66   | Benin .....              | 4.0       |
| 1    | Canada.....                 | 7.0       | 66   | Botswana .....           | 4.0       |
| 1    | Costa Rica .....            | 7.0       | 66   | Colombia .....           | 4.0       |
| 1    | Croatia .....               | 7.0       | 66   | Egypt .....              | 4.0       |
| 1    | Cyprus .....                | 7.0       | 66   | Honduras.....            | 4.0       |
| 1    | Czech Republic.....         | 7.0       | 66   | India.....               | 4.0       |
| 1    | Dominican Republic .....    | 7.0       | 66   | Indonesia.....           | 4.0       |
| 1    | France.....                 | 7.0       | 66   | Jamaica .....            | 4.0       |
| 1    | Germany.....                | 7.0       | 66   | Japan .....              | 4.0       |
| 1    | Greece.....                 | 7.0       | 66   | Kenya.....               | 4.0       |
| 1    | Hungary .....               | 7.0       | 66   | Korea, Rep.....          | 4.0       |
| 1    | Ireland.....                | 7.0       | 66   | Kyrgyz Republic.....     | 4.0       |
| 1    | Italy.....                  | 7.0       | 66   | Malaysia .....           | 4.0       |
| 1    | Jordan.....                 | 7.0       | 66   | Moldova.....             | 4.0       |
| 1    | Kuwait .....                | 7.0       | 66   | Mozambique.....          | 4.0       |
| 1    | Latvia.....                 | 7.0       | 66   | Namibia .....            | 4.0       |
| 1    | Lithuania .....             | 7.0       | 66   | Pakistan .....           | 4.0       |
| 1    | Malta .....                 | 7.0       | 66   | Paraguay.....            | 4.0       |
| 1    | Poland.....                 | 7.0       | 66   | Philippines .....        | 4.0       |
| 1    | Portugal .....              | 7.0       | 66   | Singapore .....          | 4.0       |
| 1    | Qatar.....                  | 7.0       | 66   | Suriname .....           | 4.0       |
| 1    | Slovak Republic .....       | 7.0       | 66   | Trinidad and Tobago..... | 4.0       |
| 1    | Slovenia .....              | 7.0       | 66   | Ukraine .....            | 4.0       |
| 1    | South Africa.....           | 7.0       | 66   | Uruguay .....            | 4.0       |
| 1    | Spain.....                  | 7.0       | 66   | Zimbabwe.....            | 4.0       |
| 1    | Switzerland.....            | 7.0       | 92   | Azerbaijan .....         | 3.0       |
| 1    | Turkey .....                | 7.0       | 92   | Bolivia .....            | 3.0       |
| 1    | United Arab Emirates .....  | 7.0       | 92   | Cameroon.....            | 3.0       |
| 1    | United Kingdom .....        | 7.0       | 92   | Ecuador .....            | 3.0       |
| 1    | United States .....         | 7.0       | 92   | Kazakhstan .....         | 3.0       |
| 35   | Argentina.....              | 6.0       | 92   | Mali.....                | 3.0       |
| 35   | Bahrain .....               | 6.0       | 92   | Nigeria .....            | 3.0       |
| 35   | Bulgaria.....               | 6.0       | 92   | Sri Lanka.....           | 3.0       |
| 35   | Denmark.....                | 6.0       | 92   | Tanzania .....           | 3.0       |
| 35   | Estonia.....                | 6.0       | 92   | Zambia.....              | 3.0       |
| 35   | Finland .....               | 6.0       | 102  | Algeria .....            | 2.0       |
| 35   | Iceland.....                | 6.0       | 102  | Angola .....             | 2.0       |
| 35   | Israel.....                 | 6.0       | 102  | Armenia .....            | 2.0       |
| 35   | Luxembourg .....            | 6.0       | 102  | Burkina Faso.....        | 2.0       |
| 35   | Macedonia, FYR .....        | 6.0       | 102  | China .....              | 2.0       |
| 35   | Mauritius .....             | 6.0       | 102  | Gambia .....             | 2.0       |
| 35   | Mexico.....                 | 6.0       | 102  | Georgia.....             | 2.0       |
| 35   | Morocco .....               | 6.0       | 102  | Hong Kong SAR .....      | 2.0       |
| 35   | Netherlands.....            | 6.0       | 102  | Lesotho .....            | 2.0       |
| 35   | New Zealand .....           | 6.0       | 102  | Malawi.....              | 2.0       |
| 35   | Norway .....                | 6.0       | 102  | Mauritania.....          | 2.0       |
| 35   | Romania .....               | 6.0       | 113  | Bangladesh.....          | 1.0       |
| 35   | Russian Federation.....     | 6.0       | 113  | Barbados .....           | 1.0       |
| 35   | Serbia and Montenegro.....  | 6.0       | 113  | Burundi.....             | 1.0       |
| 35   | Sweden .....                | 6.0       | 113  | Chad .....               | 1.0       |
| 55   | Chile .....                 | 5.0       | 113  | Ethiopia.....            | 1.0       |
| 55   | El Salvador.....            | 5.0       | 113  | Mongolia.....            | 1.0       |
| 55   | Guatemala .....             | 5.0       | 113  | Taiwan, China .....      | 1.0       |
| 55   | Guyana .....                | 5.0       | 113  | Uganda .....             | 1.0       |
| 55   | Madagascar .....            | 5.0       | 121  | Cambodia .....           | 0.0       |
| 55   | Nicaragua.....              | 5.0       | 121  | Nepal .....              | 0.0       |
| 55   | Panama.....                 | 5.0       | 121  | Tajikistan.....          | 0.0       |
| 55   | Peru.....                   | 5.0       | 121  | Vietnam .....            | 0.0       |

SOURCE: Car Fleet, No 29, Jan-Mar 2005; World Economic Forum

## 8.03 ATMs accepting Visa cards

Number of automated teller machines (ATMs) accepting Visa credit cards per million population, 2006

RANK COUNTRY/ECONOMY HARD DATA

|    |                            |         |  |
|----|----------------------------|---------|--|
| 1  | United States .....        | 1,322.9 |  |
| 2  | Spain.....                 | 1,318.9 |  |
| 3  | Austria .....              | 1,054.6 |  |
| 4  | Portugal .....             | 1,034.1 |  |
| 5  | Luxembourg .....           | 934.8   |  |
| 6  | Switzerland.....           | 862.7   |  |
| 7  | Slovenia .....             | 787.5   |  |
| 8  | Australia.....             | 778.1   |  |
| 9  | France.....                | 762.9   |  |
| 10 | Taiwan, China .....        | 707.9   |  |
| 11 | Italy.....                 | 686.7   |  |
| 12 | United Kingdom .....       | 667.8   |  |
| 13 | Germany.....               | 661.0   |  |
| 14 | Norway.....                | 628.5   |  |
| 15 | Canada.....                | 622.4   |  |
| 16 | Iceland.....               | 606.7   |  |
| 17 | Denmark.....               | 604.4   |  |
| 18 | Cyprus.....                | 603.9   |  |
| 19 | Ireland.....               | 573.4   |  |
| 20 | Greece.....                | 562.1   |  |
| 21 | Estonia.....               | 557.7   |  |
| 22 | Croatia .....              | 522.0   |  |
| 23 | Qatar.....                 | 505.0   |  |
| 24 | New Zealand .....          | 495.8   |  |
| 25 | Netherlands .....          | 481.3   |  |
| 26 | Singapore .....            | 398.4   |  |
| 27 | Latvia.....                | 388.3   |  |
| 28 | Slovak Republic.....       | 347.8   |  |
| 29 | Korea, Rep.....            | 337.3   |  |
| 30 | Bulgaria.....              | 336.0   |  |
| 31 | Malta .....                | 330.0   |  |
| 32 | Finland .....              | 324.2   |  |
| 33 | Hong Kong SAR .....        | 317.3   |  |
| 34 | Sweden .....               | 316.6   |  |
| 35 | Belgium .....              | 296.7   |  |
| 36 | Lithuania.....             | 294.1   |  |
| 37 | United Arab Emirates ..... | 285.3   |  |
| 38 | Czech Republic.....        | 283.0   |  |
| 39 | Hungary .....              | 282.6   |  |
| 40 | Barbados .....             | 270.4   |  |
| 41 | South Africa.....          | 256.7   |  |
| 42 | Thailand .....             | 253.9   |  |
| 43 | Ukraine .....              | 249.1   |  |
| 44 | Mauritius .....            | 229.2   |  |
| 45 | Poland.....                | 217.3   |  |
| 46 | Japan .....                | 216.5   |  |
| 47 | Israel.....                | 216.3   |  |
| 48 | Malaysia .....             | 213.4   |  |
| 49 | Mexico.....                | 204.0   |  |
| 50 | Romania .....              | 203.5   |  |
| 51 | Trinidad and Tobago.....   | 200.8   |  |
| 52 | Chile .....                | 196.3   |  |
| 53 | Bahrain .....              | 191.8   |  |
| 54 | Botswana .....             | 185.6   |  |
| 55 | Russian Federation.....    | 183.8   |  |
| 56 | Argentina.....             | 183.4   |  |
| 57 | Kuwait.....                | 175.2   |  |
| 58 | Panama.....                | 158.4   |  |
| 59 | Colombia .....             | 148.2   |  |
| 60 | Costa Rica .....           | 134.0   |  |
| 61 | Brazil.....                | 133.3   |  |
| 62 | Dominican Republic .....   | 126.2   |  |

RANK COUNTRY/ECONOMY HARD DATA

|     |                             |       |  |
|-----|-----------------------------|-------|--|
| 63  | Kazakhstan .....            | 115.7 |  |
| 64  | Jordan.....                 | 109.6 |  |
| 65  | Azerbaijan .....            | 94.9  |  |
| 66  | Bosnia and Herzegovina..... | 85.6  |  |
| 67  | Venezuela .....             | 83.5  |  |
| 68  | Serbia and Montenegro.....  | 82.7  |  |
| 69  | Namibia .....               | 82.0  |  |
| 70  | Morocco .....               | 74.1  |  |
| 71  | Tunisia .....               | 73.9  |  |
| 72  | Moldova.....                | 65.2  |  |
| 73  | Albania.....                | 60.6  |  |
| 74  | Jamaica .....               | 57.0  |  |
| 75  | Uruguay .....               | 55.7  |  |
| 76  | Indonesia .....             | 52.1  |  |
| 77  | Georgia.....                | 48.2  |  |
| 78  | Bolivia.....                | 47.0  |  |
| 79  | Guatemala .....             | 39.9  |  |
| 80  | Peru.....                   | 38.1  |  |
| 81  | Sri Lanka.....              | 37.1  |  |
| 82  | Nicaragua.....              | 34.0  |  |
| 83  | Paraguay.....               | 30.8  |  |
| 84  | El Salvador.....            | 30.7  |  |
| 85  | China .....                 | 28.8  |  |
| 86  | Macedonia, FYR .....        | 27.0  |  |
| 87  | Egypt .....                 | 25.8  |  |
| 88  | Armenia .....               | 24.7  |  |
| 89  | Ecuador .....               | 23.3  |  |
| 90  | Honduras.....               | 17.9  |  |
| 91  | India.....                  | 16.0  |  |
| 92  | Zimbabwe.....               | 13.4  |  |
| 93  | Vietnam .....               | 13.2  |  |
| 94  | Mozambique.....             | 12.8  |  |
| 95  | Kenya.....                  | 11.6  |  |
| 96  | Turkey.....                 | 10.2  |  |
| 97  | Mongolia.....               | 9.6   |  |
| 98  | Philippines .....           | 8.8   |  |
| 99  | Zambia.....                 | 5.4   |  |
| 100 | Tajikistan .....            | 5.1   |  |
| 101 | Gambia .....                | 3.3   |  |
| 102 | Nepal .....                 | 3.3   |  |
| 103 | Burkina Faso.....           | 3.2   |  |
| 104 | Cambodia .....              | 2.8   |  |
| 105 | Kyrgyz Republic.....        | 2.5   |  |
| 106 | Malawi.....                 | 2.2   |  |
| 107 | Cameroon.....               | 1.5   |  |
| 108 | Benin .....                 | 1.3   |  |
| 109 | Uganda .....                | 0.9   |  |
| 110 | Pakistan .....              | 0.8   |  |
| 111 | Bangladesh.....             | 0.5   |  |
| 112 | Madagascar .....            | 0.4   |  |
| 113 | Mali.....                   | 0.1   |  |
| 114 | Nigeria .....               | 0.0   |  |
| 115 | Algeria .....               | 0.0   |  |
| 115 | Angola .....                | 0.0   |  |
| 115 | Guyana .....                | 0.0   |  |
| n/a | Burundi .....               | n/a   |  |
| n/a | Chad .....                  | n/a   |  |
| n/a | Ethiopia.....               | n/a   |  |
| n/a | Lesotho.....                | n/a   |  |
| n/a | Mauritania.....             | n/a   |  |
| n/a | Suriname .....              | n/a   |  |
| n/a | Tanzania .....              | n/a   |  |



## Pillar 9

# ICT infrastructure

## 9.01 Extent of business Internet use

In your country, companies use the Internet extensively for buying/selling goods and services and for interaction with customers  
(1 = strongly disagree, 7 = strongly agree)

| RANK | COUNTRY/ECONOMY        | SCORE | 1 | MEAN: 3.9 | 7 | SD  | RANK | COUNTRY/ECONOMY       | SCORE | 1 | MEAN: 3.9 | 7 | SD  |
|------|------------------------|-------|---|-----------|---|-----|------|-----------------------|-------|---|-----------|---|-----|
| 1    | Korea, Rep.            | 6.1   |   |           |   | 1.0 | 63   | Costa Rica            | 3.8   |   |           |   | 1.5 |
| 2    | United Kingdom         | 6.1   |   |           |   | 0.9 | 64   | Trinidad and Tobago   | 3.7   |   |           |   | 1.8 |
| 3    | Estonia                | 6.0   |   |           |   | 1.0 | 65   | Egypt                 | 3.7   |   |           |   | 1.6 |
| 4    | Sweden                 | 5.7   |   |           |   | 1.4 | 66   | Qatar                 | 3.7   |   |           |   | 1.6 |
| 5    | Netherlands            | 5.7   |   |           |   | 1.0 | 67   | Jordan                | 3.7   |   |           |   | 1.7 |
| 6    | Germany                | 5.6   |   |           |   | 0.9 | 68   | Kuwait                | 3.6   |   |           |   | 1.7 |
| 7    | Switzerland            | 5.6   |   |           |   | 1.0 | 69   | Kenya                 | 3.6   |   |           |   | 1.8 |
| 8    | Iceland                | 5.6   |   |           |   | 1.3 | 70   | Kazakhstan            | 3.6   |   |           |   | 1.9 |
| 9    | Canada                 | 5.6   |   |           |   | 1.2 | 71   | Colombia              | 3.6   |   |           |   | 1.5 |
| 10   | Denmark                | 5.6   |   |           |   | 1.0 | 72   | Mauritania            | 3.6   |   |           |   | 2.5 |
| 11   | Norway                 | 5.5   |   |           |   | 1.1 | 73   | Namibia               | 3.6   |   |           |   | 1.8 |
| 12   | United States          | 5.5   |   |           |   | 1.5 | 74   | Uganda                | 3.5   |   |           |   | 1.9 |
| 13   | Japan                  | 5.4   |   |           |   | 1.3 | 75   | China                 | 3.5   |   |           |   | 1.5 |
| 14   | Israel                 | 5.4   |   |           |   | 1.4 | 76   | Dominican Republic    | 3.5   |   |           |   | 1.7 |
| 15   | Finland                | 5.4   |   |           |   | 1.3 | 77   | Sri Lanka             | 3.5   |   |           |   | 1.6 |
| 16   | Australia              | 5.2   |   |           |   | 1.3 | 78   | Honduras              | 3.4   |   |           |   | 1.5 |
| 17   | Austria                | 5.2   |   |           |   | 1.1 | 79   | Venezuela             | 3.4   |   |           |   | 1.4 |
| 18   | Taiwan, China          | 5.1   |   |           |   | 1.2 | 80   | Romania               | 3.4   |   |           |   | 1.5 |
| 19   | France                 | 5.1   |   |           |   | 1.2 | 81   | Nigeria               | 3.4   |   |           |   | 1.8 |
| 20   | Czech Republic         | 5.0   |   |           |   | 1.2 | 82   | Bahrain               | 3.3   |   |           |   | 1.6 |
| 21   | Singapore              | 5.0   |   |           |   | 1.1 | 83   | Tajikistan            | 3.3   |   |           |   | 1.8 |
| 22   | New Zealand            | 5.0   |   |           |   | 1.4 | 84   | Mali                  | 3.3   |   |           |   | 1.9 |
| 23   | Brazil                 | 5.0   |   |           |   | 1.3 | 85   | Nepal                 | 3.3   |   |           |   | 1.6 |
| 24   | Hong Kong SAR          | 4.9   |   |           |   | 1.4 | 86   | Bulgaria              | 3.3   |   |           |   | 1.5 |
| 25   | Ireland                | 4.9   |   |           |   | 1.5 | 87   | Tanzania              | 3.2   |   |           |   | 1.6 |
| 26   | Chile                  | 4.8   |   |           |   | 1.2 | 88   | Greece                | 3.2   |   |           |   | 1.3 |
| 27   | Malaysia               | 4.8   |   |           |   | 1.2 | 89   | Ukraine               | 3.2   |   |           |   | 1.5 |
| 28   | Thailand               | 4.7   |   |           |   | 1.4 | 90   | Ecuador               | 3.2   |   |           |   | 1.2 |
| 29   | Lithuania              | 4.6   |   |           |   | 1.4 | 91   | Armenia               | 3.2   |   |           |   | 1.6 |
| 30   | Slovenia               | 4.6   |   |           |   | 1.4 | 92   | Guyana                | 3.2   |   |           |   | 1.6 |
| 31   | India                  | 4.6   |   |           |   | 1.3 | 93   | Burkina Faso          | 3.1   |   |           |   | 1.9 |
| 32   | Belgium                | 4.6   |   |           |   | 1.2 | 94   | Cambodia              | 3.1   |   |           |   | 2.0 |
| 33   | Luxembourg             | 4.5   |   |           |   | 1.4 | 95   | Serbia and Montenegro | 3.1   |   |           |   | 1.9 |
| 34   | Malta                  | 4.4   |   |           |   | 1.3 | 96   | Nicaragua             | 3.1   |   |           |   | 1.5 |
| 35   | Slovak Republic        | 4.3   |   |           |   | 1.3 | 97   | Bangladesh            | 3.1   |   |           |   | 1.7 |
| 36   | Latvia                 | 4.3   |   |           |   | 1.6 | 98   | Mongolia              | 3.1   |   |           |   | 1.6 |
| 37   | Portugal               | 4.3   |   |           |   | 1.1 | 99   | Georgia               | 3.0   |   |           |   | 1.7 |
| 38   | Panama                 | 4.3   |   |           |   | 1.7 | 100  | Gambia                | 3.0   |   |           |   | 1.7 |
| 39   | Guatemala              | 4.2   |   |           |   | 1.5 | 101  | Madagascar            | 3.0   |   |           |   | 1.6 |
| 40   | Italy                  | 4.2   |   |           |   | 1.5 | 102  | Zimbabwe              | 3.0   |   |           |   | 1.4 |
| 41   | Poland                 | 4.2   |   |           |   | 1.1 | 103  | Mauritius             | 3.0   |   |           |   | 1.4 |
| 42   | Russian Federation     | 4.1   |   |           |   | 1.7 | 104  | Malawi                | 2.9   |   |           |   | 1.5 |
| 43   | Hungary                | 4.1   |   |           |   | 1.5 | 105  | Benin                 | 2.9   |   |           |   | 1.7 |
| 44   | Spain                  | 4.1   |   |           |   | 1.4 | 106  | Bolivia               | 2.9   |   |           |   | 1.3 |
| 45   | United Arab Emirates   | 4.1   |   |           |   | 1.5 | 107  | Zambia                | 2.9   |   |           |   | 1.1 |
| 46   | Peru                   | 4.0   |   |           |   | 1.3 | 108  | Suriname              | 2.9   |   |           |   | 1.7 |
| 47   | Cyprus                 | 4.0   |   |           |   | 1.4 | 109  | Morocco               | 2.8   |   |           |   | 1.6 |
| 48   | Indonesia              | 4.0   |   |           |   | 1.1 | 110  | Botswana              | 2.8   |   |           |   | 1.4 |
| 49   | South Africa           | 4.0   |   |           |   | 1.4 | 111  | Vietnam               | 2.8   |   |           |   | 1.6 |
| 50   | Pakistan               | 4.0   |   |           |   | 1.4 | 112  | Ethiopia              | 2.8   |   |           |   | 1.7 |
| 51   | Philippines            | 3.9   |   |           |   | 1.4 | 113  | Paraguay              | 2.7   |   |           |   | 1.3 |
| 52   | Jamaica                | 3.9   |   |           |   | 1.6 | 114  | Mozambique            | 2.7   |   |           |   | 1.5 |
| 53   | El Salvador            | 3.9   |   |           |   | 1.3 | 115  | Lesotho               | 2.7   |   |           |   | 1.6 |
| 54   | Uruguay                | 3.9   |   |           |   | 1.5 | 116  | Kyrgyz Republic       | 2.7   |   |           |   | 1.5 |
| 55   | Argentina              | 3.9   |   |           |   | 1.6 | 117  | Macedonia, FYR        | 2.7   |   |           |   | 1.5 |
| 56   | Mexico                 | 3.9   |   |           |   | 1.4 | 118  | Angola                | 2.6   |   |           |   | 1.7 |
| 57   | Azerbaijan             | 3.9   |   |           |   | 1.9 | 119  | Albania               | 2.6   |   |           |   | 1.5 |
| 58   | Croatia                | 3.9   |   |           |   | 1.5 | 120  | Moldova               | 2.5   |   |           |   | 1.5 |
| 59   | Tunisia                | 3.8   |   |           |   | 1.6 | 121  | Cameroon              | 2.4   |   |           |   | 1.6 |
| 60   | Barbados               | 3.8   |   |           |   | 1.6 | 122  | Burundi               | 2.3   |   |           |   | 1.3 |
| 61   | Turkey                 | 3.8   |   |           |   | 1.4 | 123  | Algeria               | 2.2   |   |           |   | 1.5 |
| 62   | Bosnia and Herzegovina | 3.8   |   |           |   | 1.8 | 124  | Chad                  | 1.9   |   |           |   | 1.4 |

SOURCE: World Economic Forum, Executive Opinion Survey 2006

## 9.02 Internet users

Internet users per 100 population, 2004 or most recent year available

RANK COUNTRY/ECONOMY HARD DATA

|    |                      |      |
|----|----------------------|------|
| 1  | Iceland              | 77.0 |
| 2  | Sweden               | 75.5 |
| 3  | Malta                | 75.3 |
| 4  | Korea, Rep.          | 65.7 |
| 5  | Australia            | 65.3 |
| 6  | United States        | 63.0 |
| 7  | Finland              | 63.0 |
| 8  | United Kingdom       | 62.9 |
| 9  | Canada               | 62.4 |
| 10 | Netherlands          | 61.6 |
| 11 | Luxembourg           | 59.0 |
| 12 | Singapore            | 56.1 |
| 13 | Barbados             | 55.4 |
| 14 | Taiwan, China        | 53.8 |
| 15 | New Zealand          | 52.6 |
| 16 | Estonia              | 51.2 |
| 17 | Denmark              | 50.4 |
| 18 | Hong Kong SAR        | 50.3 |
| 19 | Japan                | 50.2 |
| 20 | Czech Republic       | 50.0 |
| 21 | Italy                | 49.8 |
| 22 | Slovenia             | 48.0 |
| 23 | Austria              | 47.5 |
| 24 | Switzerland          | 47.2 |
| 25 | Israel               | 46.6 |
| 26 | Germany              | 42.7 |
| 27 | Slovak Republic      | 42.3 |
| 28 | France               | 41.4 |
| 29 | Belgium              | 40.2 |
| 30 | Jamaica              | 39.9 |
| 31 | Norway               | 39.4 |
| 32 | Malaysia             | 38.6 |
| 33 | Cyprus               | 36.9 |
| 34 | Latvia               | 35.4 |
| 35 | Spain                | 33.2 |
| 36 | United Arab Emirates | 31.9 |
| 37 | Ireland              | 29.6 |
| 38 | Croatia              | 29.5 |
| 39 | Lithuania            | 28.1 |
| 40 | Portugal             | 28.0 |
| 41 | Chile                | 27.9 |
| 42 | Hungary              | 26.7 |
| 43 | Costa Rica           | 23.5 |
| 44 | Kuwait               | 23.5 |
| 45 | Poland               | 23.3 |
| 46 | Qatar                | 22.2 |
| 47 | Bahrain              | 21.3 |
| 48 | Uruguay              | 21.0 |
| 49 | Romania              | 20.8 |
| 50 | Guyana               | 18.9 |
| 51 | Greece               | 17.8 |
| 52 | Argentina            | 16.1 |
| 53 | Bulgaria             | 15.9 |
| 54 | Mauritius            | 14.6 |
| 55 | Turkey               | 14.1 |
| 56 | Mexico               | 13.4 |
| 57 | Trinidad and Tobago  | 12.2 |
| 58 | Brazil               | 12.2 |
| 59 | Morocco              | 11.7 |
| 60 | Peru                 | 11.6 |
| 61 | Thailand             | 11.3 |
| 62 | Russian Federation   | 11.1 |

RANK COUNTRY/ECONOMY HARD DATA

|     |                        |      |
|-----|------------------------|------|
| 63  | Jordan                 | 10.7 |
| 64  | Moldova                | 9.5  |
| 65  | Panama                 | 9.5  |
| 66  | Dominican Republic     | 9.1  |
| 67  | Colombia               | 8.9  |
| 68  | El Salvador            | 8.9  |
| 69  | Venezuela              | 8.8  |
| 70  | Tunisia                | 8.4  |
| 71  | South Africa           | 7.9  |
| 72  | Ukraine                | 7.8  |
| 73  | Macedonia, FYR         | 7.7  |
| 74  | Mongolia               | 7.6  |
| 75  | China                  | 7.2  |
| 76  | Vietnam                | 7.1  |
| 77  | Zimbabwe               | 6.9  |
| 78  | Suriname               | 6.8  |
| 79  | Indonesia              | 6.5  |
| 80  | Guatemala              | 6.0  |
| 81  | Bosnia and Herzegovina | 5.8  |
| 82  | Egypt                  | 5.6  |
| 83  | Philippines            | 5.3  |
| 84  | Kyrgyz Republic        | 5.2  |
| 85  | Azerbaijan             | 4.9  |
| 86  | Ecuador                | 4.7  |
| 87  | Kenya                  | 4.6  |
| 88  | Armenia                | 3.9  |
| 89  | Bolivia                | 3.9  |
| 90  | Namibia                | 3.7  |
| 91  | Botswana               | 3.5  |
| 92  | Georgia                | 3.5  |
| 93  | Gambia                 | 3.4  |
| 94  | India                  | 3.2  |
| 95  | Honduras               | 3.2  |
| 96  | Algeria                | 2.6  |
| 97  | Kazakhstan             | 2.6  |
| 98  | Paraguay               | 2.5  |
| 99  | Lesotho                | 2.4  |
| 100 | Albania                | 2.3  |
| 101 | Nicaragua              | 2.2  |
| 102 | Zambia                 | 2.1  |
| 103 | Sri Lanka              | 1.4  |
| 104 | Nigeria                | 1.4  |
| 105 | Benin                  | 1.4  |
| 106 | Pakistan               | 1.3  |
| 107 | Angola                 | 1.2  |
| 108 | Cameroon               | 1.0  |
| 109 | Tanzania               | 0.9  |
| 110 | Uganda                 | 0.7  |
| 111 | Mozambique             | 0.7  |
| 112 | Madagascar             | 0.5  |
| 113 | Nepal                  | 0.5  |
| 114 | Mauritania             | 0.5  |
| 115 | Mali                   | 0.5  |
| 116 | Burkina Faso           | 0.4  |
| 117 | Chad                   | 0.4  |
| 118 | Malawi                 | 0.4  |
| 119 | Burundi                | 0.4  |
| 120 | Cambodia               | 0.3  |
| 121 | Bangladesh             | 0.2  |
| 122 | Ethiopia               | 0.2  |
| 123 | Tajikistan             | 0.1  |
| n/a | Serbia and Montenegro  | n/a  |

SOURCE: International Telecommunication Union, *World Telecommunication Indicators 2005*; national sources

## 9.03 Telephone lines

Main telephone lines per 100 inhabitants, 2004

RANK COUNTRY/ECONOMY HARD DATA

|    |                        |      |
|----|------------------------|------|
| 1  | Luxembourg             | 79.8 |
| 2  | Sweden                 | 71.5 |
| 3  | Switzerland            | 71.0 |
| 4  | Germany                | 66.2 |
| 5  | Iceland                | 65.0 |
| 6  | Denmark                | 64.5 |
| 7  | Canada                 | 64.3 |
| 8  | United States          | 60.6 |
| 9  | Taiwan, China          | 59.6 |
| 10 | Australia              | 58.6 |
| 11 | Greece                 | 57.8 |
| 12 | United Kingdom         | 56.4 |
| 13 | France                 | 56.0 |
| 14 | Korea, Rep.            | 55.3 |
| 15 | Hong Kong SAR          | 54.4 |
| 16 | Cyprus                 | 51.8 |
| 17 | Malta                  | 51.6 |
| 18 | Barbados               | 50.1 |
| 19 | Ireland                | 49.8 |
| 20 | Netherlands            | 48.4 |
| 21 | Norway                 | 47.2 |
| 22 | Japan                  | 46.6 |
| 23 | Austria                | 46.2 |
| 24 | New Zealand            | 46.1 |
| 25 | Belgium                | 46.0 |
| 26 | Finland                | 45.4 |
| 27 | Italy                  | 44.8 |
| 28 | Israel                 | 43.7 |
| 29 | Singapore              | 43.2 |
| 30 | Croatia                | 42.7 |
| 31 | Spain                  | 41.5 |
| 32 | Slovenia               | 40.7 |
| 33 | Portugal               | 40.3 |
| 34 | Hungary                | 35.4 |
| 35 | Bulgaria               | 35.1 |
| 36 | Estonia                | 34.0 |
| 37 | Czech Republic         | 33.6 |
| 38 | Serbia and Montenegro  | 32.9 |
| 39 | Poland                 | 31.9 |
| 40 | Costa Rica             | 31.6 |
| 41 | Uruguay                | 30.9 |
| 42 | Mauritius              | 28.7 |
| 43 | Latvia                 | 28.5 |
| 44 | Russian Federation     | 27.5 |
| 45 | United Arab Emirates   | 27.3 |
| 46 | Bahrain                | 26.7 |
| 47 | Turkey                 | 26.5 |
| 48 | Qatar                  | 25.7 |
| 49 | Ukraine                | 25.2 |
| 50 | Macedonia, FYR         | 25.2 |
| 51 | Trinidad and Tobago    | 24.6 |
| 52 | Bosnia and Herzegovina | 24.0 |
| 52 | China                  | 24.0 |
| 54 | Lithuania              | 23.8 |
| 55 | Brazil                 | 23.5 |
| 56 | Slovak Republic        | 23.2 |
| 57 | Argentina              | 22.8 |
| 58 | Chile                  | 21.5 |
| 59 | Moldova                | 20.3 |
| 59 | Romania                | 20.3 |
| 61 | Kuwait                 | 19.5 |
| 62 | Suriname               | 18.6 |

RANK COUNTRY/ECONOMY HARD DATA

|     |                    |      |
|-----|--------------------|------|
| 63  | Malaysia           | 17.4 |
| 64  | Mexico             | 17.2 |
| 65  | Colombia           | 17.1 |
| 66  | Kazakhstan         | 16.2 |
| 67  | Armenia            | 15.3 |
| 68  | Jamaica            | 14.6 |
| 69  | Egypt              | 13.5 |
| 70  | Georgia            | 13.5 |
| 71  | El Salvador        | 13.4 |
| 72  | Guyana             | 13.4 |
| 73  | Venezuela          | 12.8 |
| 74  | Azerbaijan         | 12.3 |
| 74  | Vietnam            | 12.3 |
| 76  | Ecuador            | 12.2 |
| 77  | Tunisia            | 12.1 |
| 78  | Panama             | 11.9 |
| 79  | Jordan             | 11.0 |
| 80  | Thailand           | 11.0 |
| 81  | Dominican Republic | 10.7 |
| 82  | South Africa       | 10.4 |
| 83  | Guatemala          | 8.9  |
| 84  | Albania            | 8.3  |
| 85  | Kyrgyz Republic    | 8.2  |
| 86  | Botswana           | 8.0  |
| 87  | Peru               | 7.4  |
| 88  | Algeria            | 7.1  |
| 89  | Bolivia            | 7.0  |
| 90  | Namibia            | 6.4  |
| 91  | Mongolia           | 5.6  |
| 92  | Honduras           | 5.6  |
| 93  | Sri Lanka          | 5.1  |
| 94  | Paraguay           | 4.7  |
| 95  | Indonesia          | 4.5  |
| 96  | Morocco            | 4.4  |
| 97  | Philippines        | 4.2  |
| 98  | India              | 4.1  |
| 99  | Nicaragua          | 3.8  |
| 100 | Tajikistan         | 3.8  |
| 101 | Pakistan           | 3.0  |
| 102 | Gambia             | 2.9  |
| 103 | Zimbabwe           | 2.7  |
| 104 | Lesotho            | 2.1  |
| 105 | Nepal              | 1.7  |
| 106 | Mauritania         | 1.3  |
| 107 | Benin              | 1.0  |
| 108 | Kenya              | 0.9  |
| 109 | Zambia             | 0.8  |
| 110 | Nigeria            | 0.8  |
| 111 | Malawi             | 0.8  |
| 112 | Mali               | 0.7  |
| 113 | Angola             | 0.7  |
| 114 | Ethiopia           | 0.6  |
| 115 | Bangladesh         | 0.6  |
| 115 | Burkina Faso       | 0.6  |
| 117 | Cameroon           | 0.6  |
| 118 | Tanzania           | 0.4  |
| 119 | Mozambique         | 0.4  |
| 120 | Burundi            | 0.3  |
| 120 | Madagascar         | 0.3  |
| 122 | Uganda             | 0.3  |
| 123 | Cambodia           | 0.3  |
| 124 | Chad               | 0.2  |

SOURCE: International Telecommunication Union, *World Telecommunication Indicators 2005*; national sources

## Pillar 10

# Price competitiveness in the T&T industry

## 10.01 Ticket taxes and airport charges

Index of relative cost of access (ticket taxes and airport charges) to international air transport services, 2006  
(0=highest cost, 100=lowest cost)

| RANK | COUNTRY/ECONOMY             | HARD DATA | RANK | COUNTRY/ECONOMY              | HARD DATA |
|------|-----------------------------|-----------|------|------------------------------|-----------|
| 1    | Kuwait .....                | 100.0     | 63   | New Zealand .....            | 77.9      |
| 2    | Luxembourg .....            | 99.9      | 64   | Cambodia .....               | 76.9      |
| 3    | United Arab Emirates .....  | 98.5      | 65   | Angola .....                 | 76.8      |
| 4    | Qatar .....                 | 98.4      | 66   | Uruguay .....                | 76.6      |
| 5    | Bahrain .....               | 98.3      | 67   | Czech Republic .....         | 76.5      |
| 6    | Lesotho .....               | 98.3      | 68   | Denmark .....                | 76.1      |
| 7    | India .....                 | 97.7      | 69   | Tanzania .....               | 76.0      |
| 8    | Malaysia .....              | 97.1      | 70   | Paraguay .....               | 75.9      |
| 9    | Greece .....                | 96.1      | 71   | Mauritius .....              | 75.8      |
| 10   | Indonesia .....             | 95.6      | 72   | Moldova .....                | 75.3      |
| 11   | Thailand .....              | 95.6      | 73   | Romania .....                | 74.9      |
| 12   | Barbados .....              | 94.8      | 74   | Benin .....                  | 74.4      |
| 13   | Taiwan, China .....         | 94.2      | 75   | Uganda .....                 | 74.4      |
| 14   | Philippines .....           | 93.6      | 76   | France .....                 | 74.4      |
| 15   | Ireland .....               | 93.3      | 77   | Slovak Republic .....        | 73.8      |
| 16   | Botswana .....              | 92.4      | 78   | Kyrgyz Republic .....        | 73.6      |
| 17   | Bulgaria .....              | 91.2      | 79   | United Kingdom .....         | 73.4      |
| 18   | Panama .....                | 90.8      | 80   | Burkina Faso .....           | 72.8      |
| 19   | Spain .....                 | 90.7      | 81   | Argentina .....              | 71.8      |
| 20   | Turkey .....                | 89.6      | 82   | Ukraine .....                | 71.6      |
| 21   | China .....                 | 89.4      | 83   | Pakistan .....               | 71.4      |
| 22   | Cyprus .....                | 89.3      | 84   | Costa Rica .....             | 71.0      |
| 23   | Hong Kong SAR .....         | 89.2      | 85   | Brazil .....                 | 70.4      |
| 24   | Jordan .....                | 89.1      | 86   | Azerbaijan .....             | 70.0      |
| 25   | Mozambique .....            | 88.4      | 87   | Bangladesh .....             | 69.9      |
| 26   | Zambia .....                | 88.4      | 88   | Bosnia and Herzegovina ..... | 69.8      |
| 27   | Italy .....                 | 88.3      | 89   | South Africa .....           | 69.7      |
| 28   | Korea, Rep. ....            | 88.1      | 90   | Namibia .....                | 68.1      |
| 29   | Ethiopia .....              | 87.6      | 91   | Ecuador .....                | 67.6      |
| 30   | Egypt .....                 | 87.4      | 92   | Austria .....                | 65.6      |
| 31   | Tajikistan .....            | 87.4      | 93   | Netherlands .....            | 65.4      |
| 32   | Estonia .....               | 87.3      | 94   | Georgia .....                | 65.3      |
| 33   | Sweden .....                | 87.2      | 95   | Jamaica .....                | 64.8      |
| 34   | Singapore .....             | 87.0      | 96   | Nigeria .....                | 64.3      |
| 35   | Armenia .....               | 86.7      | 97   | Suriname .....               | 63.3      |
| 36   | Latvia .....                | 86.3      | 98   | Mauritania .....             | 63.3      |
| 37   | Vietnam .....               | 86.0      | 99   | Honduras .....               | 60.9      |
| 38   | Mongolia .....              | 85.9      | 100  | Kenya .....                  | 60.8      |
| 39   | Hungary .....               | 85.4      | 101  | Australia .....              | 60.0      |
| 40   | Croatia .....               | 85.4      | 102  | Chile .....                  | 60.0      |
| 41   | Algeria .....               | 85.3      | 103  | Tunisia .....                | 59.6      |
| 42   | Belgium .....               | 85.1      | 104  | Trinidad and Tobago .....    | 59.3      |
| 43   | Nepal .....                 | 84.9      | 105  | Iceland .....                | 57.7      |
| 44   | Germany .....               | 84.7      | 106  | Venezuela .....              | 54.4      |
| 45   | Madagascar .....            | 84.6      | 107  | Bolivia .....                | 54.3      |
| 46   | Norway .....                | 83.7      | 108  | Cameroon .....               | 53.4      |
| 47   | Finland .....               | 83.4      | 109  | United States .....          | 52.2      |
| 48   | Serbia and Montenegro ..... | 83.1      | 110  | Nicaragua .....              | 51.2      |
| 49   | Poland .....                | 82.7      | 111  | Peru .....                   | 51.2      |
| 50   | Macedonia, FYR .....        | 82.2      | 112  | Guatemala .....              | 51.1      |
| 51   | Russian Federation .....    | 82.1      | 113  | Colombia .....               | 50.9      |
| 52   | Malawi .....                | 82.0      | 114  | Mexico .....                 | 50.8      |
| 53   | Albania .....               | 81.8      | 115  | Sri Lanka .....              | 50.4      |
| 54   | Portugal .....              | 81.6      | 116  | Mali .....                   | 48.0      |
| 55   | Slovenia .....              | 81.2      | 117  | Canada .....                 | 46.9      |
| 56   | Burundi .....               | 81.2      | 118  | Malta .....                  | 43.4      |
| 57   | Zimbabwe .....              | 81.0      | 119  | El Salvador .....            | 42.4      |
| 58   | Lithuania .....             | 80.2      | 120  | Gambia .....                 | 39.5      |
| 59   | Switzerland .....           | 80.1      | 121  | Guyana .....                 | 33.7      |
| 60   | Israel .....                | 78.8      | 122  | Dominican Republic .....     | 28.6      |
| 61   | Japan .....                 | 78.4      | 123  | Chad .....                   | 0.0       |
| 62   | Morocco .....               | 78.1      | n/a  | Kazakhstan .....             | n/a       |

SOURCE: International Air Transport Association

## 10.02 Purchasing power parity

Ratio of purchasing power parity (PPP) conversion factor to official exchange rate, 2005

| RANK | COUNTRY/ECONOMY             | HARD DATA | RANK | COUNTRY/ECONOMY            | HARD DATA |
|------|-----------------------------|-----------|------|----------------------------|-----------|
| 1    | El Salvador.....            | 0.1       | 63   | Benin .....                | 0.5       |
| 2    | Zimbabwe.....               | 0.1       | 64   | Romania .....              | 0.5       |
| 3    | Burundi.....                | 0.1       | 65   | Botswana .....             | 0.5       |
| 4    | Gambia .....                | 0.2       | 66   | Lithuania.....             | 0.5       |
| 5    | Cambodia .....              | 0.2       | 67   | Slovak Republic.....       | 0.5       |
| 6    | Ethiopia.....               | 0.2       | 68   | Guatemala .....            | 0.5       |
| 7    | Nepal .....                 | 0.2       | 69   | Latvia .....               | 0.5       |
| 8    | Uganda .....                | 0.2       | 70   | Taiwan, China .....        | 0.5       |
| 9    | Bangladesh.....             | 0.2       | 71   | Nigeria .....              | 0.6       |
| 10   | Vietnam .....               | 0.2       | 72   | Ecuador .....              | 0.6       |
| 11   | India .....                 | 0.2       | 73   | Chile .....                | 0.6       |
| 12   | Guyana .....                | 0.2       | 74   | Estonia.....               | 0.6       |
| 13   | Kyrgyz Republic.....        | 0.2       | 75   | Poland.....                | 0.6       |
| 14   | Philippines .....           | 0.2       | 76   | Turkey.....                | 0.6       |
| 15   | China .....                 | 0.2       | 77   | Hungary .....              | 0.6       |
| 16   | Nicaragua.....              | 0.2       | 78   | Panama.....                | 0.6       |
| 17   | Ukraine .....               | 0.2       | 79   | Barbados .....             | 0.6       |
| 18   | Mozambique.....             | 0.2       | 80   | Czech Republic.....        | 0.6       |
| 19   | Paraguay.....               | 0.3       | 81   | Angola .....               | 0.7       |
| 20   | Tajikistan.....             | 0.3       | 82   | Serbia and Montenegro..... | 0.7       |
| 21   | Malawi.....                 | 0.3       | 83   | Zambia .....               | 0.7       |
| 22   | Lesotho .....               | 0.3       | 84   | Croatia .....              | 0.7       |
| 23   | Sri Lanka.....              | 0.3       | 85   | Malta .....                | 0.7       |
| 24   | Indonesia.....              | 0.3       | 86   | Mexico.....                | 0.7       |
| 25   | Pakistan.....               | 0.3       | 87   | Hong Kong SAR .....        | 0.7       |
| 26   | Madagascar .....            | 0.3       | 88   | Slovenia.....              | 0.8       |
| 27   | Thailand .....              | 0.3       | 89   | Israel.....                | 0.8       |
| 28   | Egypt .....                 | 0.3       | 90   | Korea, Rep.....            | 0.8       |
| 29   | Azerbaijan.....             | 0.3       | 91   | Bahrain .....              | 0.8       |
| 30   | Mongolia.....               | 0.3       | 92   | Venezuela .....            | 0.8       |
| 31   | Burkina Faso.....           | 0.3       | 93   | Trinidad and Tobago.....   | 0.9       |
| 32   | Tunisia .....               | 0.3       | 94   | Greece.....                | 0.9       |
| 33   | Armenia .....               | 0.3       | 95   | Jamaica .....              | 0.9       |
| 34   | Argentina.....              | 0.3       | 96   | Portugal .....             | 0.9       |
| 35   | Moldova.....                | 0.3       | 97   | Singapore .....            | 0.9       |
| 36   | Macedonia, FYR.....         | 0.3       | 98   | Cyprus .....               | 0.9       |
| 37   | Colombia .....              | 0.4       | 99   | United States .....        | 1.0       |
| 38   | Mali.....                   | 0.4       | 100  | Canada.....                | 1.0       |
| 39   | Bulgaria.....               | 0.4       | 101  | United Arab Emirates.....  | 1.0       |
| 40   | Bolivia .....               | 0.4       | 102  | Spain.....                 | 1.0       |
| 41   | Morocco .....               | 0.4       | 103  | Italy.....                 | 1.0       |
| 42   | Mauritius .....             | 0.4       | 104  | New Zealand .....          | 1.0       |
| 43   | Honduras.....               | 0.4       | 105  | Luxembourg .....           | 1.1       |
| 44   | Bosnia and Herzegovina..... | 0.4       | 106  | Germany.....               | 1.1       |
| 45   | Cameroon.....               | 0.4       | 107  | Austria .....              | 1.1       |
| 46   | Chad .....                  | 0.4       | 108  | Australia.....             | 1.1       |
| 47   | Kenya.....                  | 0.4       | 109  | Belgium .....              | 1.1       |
| 48   | Namibia .....               | 0.4       | 110  | France.....                | 1.1       |
| 49   | Georgia .....               | 0.4       | 111  | Japan .....                | 1.1       |
| 50   | South Africa.....           | 0.4       | 112  | Finland .....              | 1.2       |
| 51   | Algeria .....               | 0.4       | 113  | Ireland.....               | 1.2       |
| 52   | Costa Rica .....            | 0.4       | 114  | United Kingdom .....       | 1.2       |
| 53   | Kazakhstan .....            | 0.4       | 115  | Netherlands.....           | 1.2       |
| 54   | Tanzania .....              | 0.4       | 116  | Sweden .....               | 1.3       |
| 55   | Dominican Republic .....    | 0.4       | 117  | Denmark.....               | 1.4       |
| 56   | Malaysia .....              | 0.4       | 118  | Iceland.....               | 1.5       |
| 57   | Jordan.....                 | 0.5       | 119  | Qatar.....                 | 1.5       |
| 58   | Peru.....                   | 0.5       | 120  | Norway .....               | 1.5       |
| 59   | Uruguay .....               | 0.5       | 121  | Switzerland.....           | 1.5       |
| 60   | Russian Federation.....     | 0.5       | 122  | Kuwait .....               | 1.6       |
| 61   | Albania.....                | 0.5       | n/a  | Mauritania.....            | n/a       |
| 62   | Brazil.....                 | 0.5       | n/a  | Suriname .....             | n/a       |

SOURCE: International Monetary Fund, *World Economic Outlook* (April 2006), *International Financial Statistics Online*; World Bank, *World Development Indicators 2006*

## 10.03 Extent and effect of taxation

The level of taxes in your country (1 = significantly limits the incentives to work or invest, 7 = has little impact on the incentives to work or invest)

| RANK | COUNTRY/ECONOMY      | SCORE | 1 | MEAN: 3.5 | 7 | SD  | RANK | COUNTRY/ECONOMY        | SCORE | 1 | MEAN: 3.5 | 7 | SD  |
|------|----------------------|-------|---|-----------|---|-----|------|------------------------|-------|---|-----------|---|-----|
| 1    | Bahrain              | 6.1   |   |           |   | 1.4 | 63   | Morocco                | 3.2   |   |           |   | 1.6 |
| 2    | Hong Kong SAR        | 6.0   |   |           |   | 1.0 | 64   | Poland                 | 3.2   |   |           |   | 1.1 |
| 3    | United Arab Emirates | 5.9   |   |           |   | 1.6 | 65   | Spain                  | 3.2   |   |           |   | 1.3 |
| 4    | Kuwait               | 5.9   |   |           |   | 1.5 | 66   | Canada                 | 3.2   |   |           |   | 1.4 |
| 5    | Qatar                | 5.8   |   |           |   | 1.6 | 67   | Armenia                | 3.2   |   |           |   | 1.6 |
| 6    | Iceland              | 5.7   |   |           |   | 1.0 | 68   | Honduras               | 3.1   |   |           |   | 1.5 |
| 7    | Singapore            | 5.6   |   |           |   | 1.0 | 69   | Madagascar             | 3.1   |   |           |   | 1.6 |
| 8    | Slovak Republic      | 5.5   |   |           |   | 1.3 | 70   | Lesotho                | 3.1   |   |           |   | 1.5 |
| 9    | Luxembourg           | 5.3   |   |           |   | 1.2 | 71   | Venezuela              | 3.1   |   |           |   | 1.6 |
| 10   | Ireland              | 5.2   |   |           |   | 1.3 | 72   | Korea, Rep.            | 3.1   |   |           |   | 1.3 |
| 11   | Indonesia            | 5.1   |   |           |   | 1.4 | 73   | Sri Lanka              | 3.1   |   |           |   | 1.6 |
| 12   | Malaysia             | 5.0   |   |           |   | 1.1 | 74   | Mexico                 | 3.1   |   |           |   | 1.3 |
| 13   | Estonia              | 5.0   |   |           |   | 1.4 | 75   | Germany                | 3.1   |   |           |   | 1.2 |
| 13   | Mauritania           | 5.0   |   |           |   | 1.7 | 76   | Greece                 | 3.0   |   |           |   | 1.1 |
| 15   | Switzerland          | 5.0   |   |           |   | 1.3 | 77   | Kazakhstan             | 3.0   |   |           |   | 1.5 |
| 16   | Botswana             | 4.7   |   |           |   | 1.5 | 78   | Tajikistan             | 3.0   |   |           |   | 1.7 |
| 17   | Mauritius            | 4.7   |   |           |   | 1.0 | 79   | Hungary                | 3.0   |   |           |   | 1.4 |
| 18   | Tunisia              | 4.6   |   |           |   | 1.3 | 80   | Australia              | 3.0   |   |           |   | 1.0 |
| 19   | Cyprus               | 4.6   |   |           |   | 1.3 | 81   | Ecuador                | 3.0   |   |           |   | 1.4 |
| 20   | Taiwan, China        | 4.6   |   |           |   | 1.2 | 82   | Peru                   | 2.9   |   |           |   | 1.2 |
| 21   | India                | 4.4   |   |           |   | 1.3 | 83   | Turkey                 | 2.9   |   |           |   | 1.2 |
| 22   | Thailand             | 4.4   |   |           |   | 1.2 | 84   | Mali                   | 2.9   |   |           |   | 1.7 |
| 23   | Nigeria              | 4.4   |   |           |   | 1.8 | 85   | Croatia                | 2.9   |   |           |   | 1.3 |
| 24   | Trinidad and Tobago  | 4.3   |   |           |   | 1.6 | 86   | Malawi                 | 2.9   |   |           |   | 1.5 |
| 25   | United Kingdom       | 4.2   |   |           |   | 1.2 | 87   | France                 | 2.9   |   |           |   | 1.3 |
| 26   | El Salvador          | 4.2   |   |           |   | 1.3 | 88   | Macedonia, FYR         | 2.8   |   |           |   | 1.6 |
| 27   | South Africa         | 4.2   |   |           |   | 1.3 | 89   | Czech Republic         | 2.8   |   |           |   | 1.2 |
| 28   | Cambodia             | 4.1   |   |           |   | 1.8 | 90   | Albania                | 2.8   |   |           |   | 1.3 |
| 29   | Paraguay             | 3.9   |   |           |   | 1.7 | 91   | Jamaica                | 2.8   |   |           |   | 1.4 |
| 30   | Chile                | 3.9   |   |           |   | 1.4 | 92   | Dominican Republic     | 2.8   |   |           |   | 1.4 |
| 31   | United States        | 3.9   |   |           |   | 1.4 | 93   | Panama                 | 2.8   |   |           |   | 1.3 |
| 32   | Algeria              | 3.9   |   |           |   | 1.8 | 94   | Russian Federation     | 2.7   |   |           |   | 1.5 |
| 33   | Pakistan             | 3.9   |   |           |   | 1.4 | 95   | Uruguay                | 2.7   |   |           |   | 1.3 |
| 34   | Austria              | 3.8   |   |           |   | 1.4 | 96   | Mozambique             | 2.7   |   |           |   | 1.5 |
| 35   | Angola               | 3.8   |   |           |   | 1.4 | 97   | Burundi                | 2.6   |   |           |   | 1.7 |
| 36   | Egypt                | 3.8   |   |           |   | 1.8 | 98   | Bulgaria               | 2.6   |   |           |   | 1.6 |
| 37   | Guatemala            | 3.8   |   |           |   | 1.4 | 99   | Serbia and Montenegro  | 2.6   |   |           |   | 1.5 |
| 38   | Latvia               | 3.7   |   |           |   | 1.5 | 100  | Finland                | 2.5   |   |           |   | 1.4 |
| 39   | Netherlands          | 3.7   |   |           |   | 1.3 | 101  | Ukraine                | 2.5   |   |           |   | 1.5 |
| 40   | Philippines          | 3.6   |   |           |   | 1.3 | 102  | Slovenia               | 2.5   |   |           |   | 1.4 |
| 41   | Azerbaijan           | 3.6   |   |           |   | 1.7 | 103  | Zimbabwe               | 2.5   |   |           |   | 1.3 |
| 42   | Namibia              | 3.6   |   |           |   | 1.3 | 104  | Uganda                 | 2.5   |   |           |   | 1.4 |
| 43   | Barbados             | 3.6   |   |           |   | 1.2 | 105  | Moldova                | 2.5   |   |           |   | 1.3 |
| 44   | Gambia               | 3.6   |   |           |   | 1.6 | 106  | Kenya                  | 2.5   |   |           |   | 1.3 |
| 45   | Nepal                | 3.6   |   |           |   | 1.7 | 107  | Guyana                 | 2.5   |   |           |   | 1.4 |
| 46   | China                | 3.6   |   |           |   | 1.4 | 108  | Romania                | 2.4   |   |           |   | 1.2 |
| 47   | Costa Rica           | 3.6   |   |           |   | 1.4 | 109  | Colombia               | 2.4   |   |           |   | 1.1 |
| 48   | Bangladesh           | 3.6   |   |           |   | 1.6 | 110  | Nicaragua              | 2.4   |   |           |   | 1.1 |
| 49   | Japan                | 3.5   |   |           |   | 1.1 | 111  | Chad                   | 2.4   |   |           |   | 1.7 |
| 50   | Jordan               | 3.5   |   |           |   | 1.6 | 112  | Suriname               | 2.4   |   |           |   | 1.3 |
| 51   | Georgia              | 3.5   |   |           |   | 1.4 | 113  | Cameroon               | 2.3   |   |           |   | 1.4 |
| 52   | Norway               | 3.5   |   |           |   | 1.1 | 114  | Bosnia and Herzegovina | 2.3   |   |           |   | 1.3 |
| 53   | Tanzania             | 3.4   |   |           |   | 1.4 | 115  | Mongolia               | 2.3   |   |           |   | 1.5 |
| 54   | Vietnam              | 3.4   |   |           |   | 1.4 | 116  | Denmark                | 2.2   |   |           |   | 1.4 |
| 55   | Bolivia              | 3.4   |   |           |   | 1.5 | 117  | Sweden                 | 2.2   |   |           |   | 1.4 |
| 56   | Portugal             | 3.4   |   |           |   | 1.2 | 118  | Argentina              | 2.2   |   |           |   | 1.1 |
| 57   | Burkina Faso         | 3.4   |   |           |   | 1.8 | 119  | Benin                  | 2.2   |   |           |   | 1.3 |
| 58   | Israel               | 3.3   |   |           |   | 1.3 | 120  | Italy                  | 2.2   |   |           |   | 1.2 |
| 59   | Ethiopia             | 3.3   |   |           |   | 1.7 | 121  | Zambia                 | 2.1   |   |           |   | 1.1 |
| 60   | Malta                | 3.3   |   |           |   | 1.1 | 122  | Kyrgyz Republic        | 2.1   |   |           |   | 1.3 |
| 61   | New Zealand          | 3.2   |   |           |   | 0.9 | 123  | Belgium                | 2.1   |   |           |   | 1.2 |
| 62   | Lithuania            | 3.2   |   |           |   | 1.3 | 124  | Brazil                 | 1.5   |   |           |   | 0.9 |

SOURCE: World Economic Forum, Executive Opinion Survey 2006



## 10.04 Fuel price levels

Retail diesel fuel prices (US cents per liter), 2004

| RANK | COUNTRY/ECONOMY      | HARD DATA | RANK | COUNTRY/ECONOMY        | HARD DATA |
|------|----------------------|-----------|------|------------------------|-----------|
| 1    | Venezuela            | 2.0       | 63   | Canada                 | 68.0      |
| 2    | Egypt                | 10.0      | 63   | Lesotho                | 68.0      |
| 3    | Algeria              | 15.0      | 65   | Morocco                | 70.0      |
| 4    | Qatar                | 16.0      | 66   | Uruguay                | 71.0      |
| 5    | Azerbaijan           | 18.0      | 67   | Benin                  | 72.0      |
| 5    | Indonesia            | 18.0      | 68   | Gambia                 | 73.0      |
| 7    | Bahrain              | 19.0      | 69   | Kenya                  | 76.0      |
| 7    | Jordan               | 19.0      | 69   | Peru                   | 76.0      |
| 9    | Malaysia             | 22.0      | 71   | Madagascar             | 79.0      |
| 10   | Kuwait               | 24.0      | 71   | Mozambique             | 79.0      |
| 10   | Trinidad and Tobago  | 24.0      | 73   | Israel                 | 80.0      |
| 12   | Ecuador              | 27.0      | 73   | South Africa           | 80.0      |
| 13   | United Arab Emirates | 28.0      | 75   | Australia              | 83.0      |
| 14   | Angola               | 29.0      | 75   | Cameroon               | 83.0      |
| 15   | Vietnam              | 32.0      | 77   | Tanzania               | 87.0      |
| 16   | Bangladesh           | 34.0      | 78   | Iceland                | 88.0      |
| 16   | Philippines          | 34.0      | 78   | Malawi                 | 88.0      |
| 18   | Colombia             | 36.0      | 78   | Uganda                 | 88.0      |
| 19   | Thailand             | 37.0      | 81   | Bulgaria               | 89.0      |
| 20   | Kazakhstan           | 38.0      | 82   | Latvia                 | 90.0      |
| 21   | Tunisia              | 39.0      | 82   | Mali                   | 90.0      |
| 22   | Bolivia              | 40.0      | 84   | Romania                | 91.0      |
| 23   | New Zealand          | 41.0      | 85   | Macedonia, FYR         | 92.0      |
| 23   | Pakistan             | 41.0      | 86   | Burkina Faso           | 94.0      |
| 23   | Sri Lanka            | 41.0      | 86   | Estonia                | 94.0      |
| 26   | Ethiopia             | 42.0      | 88   | Cyprus                 | 95.0      |
| 27   | China                | 43.0      | 88   | Japan                  | 95.0      |
| 27   | Kyrgyz Republic      | 43.0      | 88   | Korea, Rep.            | 95.0      |
| 29   | Ukraine              | 44.0      | 91   | Serbia and Montenegro  | 95.5      |
| 30   | Mexico               | 45.0      | 92   | Bosnia and Herzegovina | 97.0      |
| 30   | Nigeria              | 45.0      | 92   | Malta                  | 97.0      |
| 30   | Russian Federation   | 45.0      | 94   | Luxembourg             | 98.0      |
| 33   | Panama               | 48.0      | 94   | Zambia                 | 98.0      |
| 34   | Brazil               | 49.0      | 96   | Hong Kong SAR          | 100.0     |
| 34   | Nepal                | 49.0      | 97   | Chad                   | 101.0     |
| 36   | Suriname             | 50.0      | 98   | Albania                | 102.0     |
| 37   | Paraguay             | 51.0      | 98   | Lithuania              | 102.0     |
| 38   | Singapore            | 55.0      | 100  | Belgium                | 107.0     |
| 38   | Taiwan, China        | 55.0      | 100  | Czech Republic         | 107.0     |
| 40   | Armenia              | 56.0      | 102  | Burundi                | 108.0     |
| 40   | Costa Rica           | 56.0      | 102  | Portugal               | 108.0     |
| 40   | Mauritius            | 56.0      | 104  | Poland                 | 109.0     |
| 43   | Jamaica              | 57.0      | 105  | Spain                  | 110.0     |
| 43   | United States        | 57.0      | 106  | Slovenia               | 111.0     |
| 45   | El Salvador          | 58.0      | 107  | Turkey                 | 112.0     |
| 46   | Argentina            | 59.0      | 108  | Croatia                | 113.0     |
| 46   | Mauritania           | 59.0      | 109  | Austria                | 119.0     |
| 46   | Tajikistan           | 59.0      | 109  | Slovak Republic        | 119.0     |
| 49   | Botswana             | 61.0      | 111  | Finland                | 121.0     |
| 49   | Cambodia             | 61.0      | 112  | Hungary                | 122.0     |
| 49   | Dominican Republic   | 61.0      | 113  | Greece                 | 123.0     |
| 49   | Guyana               | 61.0      | 113  | Netherlands            | 123.0     |
| 53   | Barbados             | 62.0      | 115  | France                 | 125.0     |
| 53   | India                | 62.0      | 116  | Germany                | 129.0     |
| 55   | Guatemala            | 63.0      | 116  | Ireland                | 129.0     |
| 56   | Chile                | 64.0      | 118  | Italy                  | 131.0     |
| 56   | Nicaragua            | 64.0      | 119  | Denmark                | 135.0     |
| 58   | Namibia              | 65.0      | 120  | Sweden                 | 137.0     |
| 58   | Zimbabwe             | 65.0      | 120  | Switzerland            | 137.0     |
| 60   | Honduras             | 66.0      | 122  | Norway                 | 144.0     |
| 61   | Georgia              | 67.0      | 123  | United Kingdom         | 160.0     |
| 61   | Mongolia             | 67.0      | n/a  | Moldova                | n/a       |

SOURCE: Deutsche Gesellschaft für Technische Zusammenarbeit (GTZ) GmbH, *International Fuel Prices 2005*



## Pillar 11

# Human resources

## 11.01 Primary education enrollment

Gross primary education enrollment rate, 2004 or most recent year available

RANK COUNTRY/ECONOMY HARD DATA

|    |                     |       |
|----|---------------------|-------|
| 1  | Cambodia            | 136.6 |
| 2  | Madagascar          | 133.5 |
| 3  | Lesotho             | 131.1 |
| 4  | Guyana              | 129.5 |
| 5  | Uganda              | 125.4 |
| 6  | Malawi              | 124.9 |
| 7  | Russian Federation  | 122.9 |
| 8  | Slovenia            | 122.8 |
| 9  | Suriname            | 120.0 |
| 10 | Argentina           | 118.0 |
| 11 | China               | 117.6 |
| 12 | Indonesia           | 117.0 |
| 13 | Ecuador             | 116.9 |
| 14 | Cameroon            | 116.8 |
| 15 | Portugal            | 116.2 |
| 16 | India               | 116.2 |
| 17 | El Salvador         | 114.4 |
| 18 | Nepal               | 113.9 |
| 19 | Peru                | 113.9 |
| 20 | Bolivia             | 113.5 |
| 21 | Guatemala           | 113.2 |
| 22 | Honduras            | 113.0 |
| 23 | Philippines         | 112.4 |
| 24 | Panama              | 112.2 |
| 25 | Nicaragua           | 112.2 |
| 26 | Dominican Republic  | 112.0 |
| 27 | Costa Rica          | 111.8 |
| 28 | Algeria             | 111.7 |
| 29 | Kenya               | 111.3 |
| 30 | Colombia            | 111.3 |
| 31 | Israel              | 110.2 |
| 32 | Paraguay            | 110.0 |
| 33 | Tunisia             | 109.9 |
| 34 | Mexico              | 109.2 |
| 35 | Kazakhstan          | 109.2 |
| 36 | Uruguay             | 109.0 |
| 37 | Bangladesh          | 108.9 |
| 38 | Hong Kong SAR       | 108.1 |
| 39 | Spain               | 107.7 |
| 40 | Netherlands         | 107.4 |
| 41 | Barbados            | 107.0 |
| 42 | United Kingdom      | 106.5 |
| 43 | Romania             | 106.5 |
| 44 | Ireland             | 106.5 |
| 45 | Morocco             | 105.9 |
| 46 | Austria             | 105.9 |
| 47 | Korea, Rep.         | 105.1 |
| 48 | Venezuela           | 105.1 |
| 49 | South Africa        | 105.0 |
| 50 | France              | 104.8 |
| 51 | Bulgaria            | 104.8 |
| 52 | Botswana            | 104.5 |
| 53 | Mongolia            | 104.4 |
| 54 | Albania             | 104.0 |
| 55 | Bahrain             | 104.0 |
| 56 | Belgium             | 103.9 |
| 57 | Chile               | 103.7 |
| 58 | Mauritius           | 102.8 |
| 59 | Australia           | 102.8 |
| 60 | Malta               | 102.4 |
| 61 | Switzerland         | 102.3 |
| 62 | Trinidad and Tobago | 102.3 |

RANK COUNTRY/ECONOMY HARD DATA

|     |                        |       |
|-----|------------------------|-------|
| 63  | Czech Republic         | 101.9 |
| 64  | New Zealand            | 101.7 |
| 65  | Qatar                  | 101.7 |
| 66  | Greece                 | 101.6 |
| 67  | Italy                  | 101.4 |
| 68  | Canada                 | 101.0 |
| 68  | Namibia                | 101.0 |
| 70  | Denmark                | 101.0 |
| 71  | Taiwan, China          | 101.0 |
| 72  | Armenia                | 100.9 |
| 73  | Iceland                | 100.9 |
| 74  | Tanzania               | 100.9 |
| 75  | Egypt                  | 100.7 |
| 76  | Finland                | 100.5 |
| 77  | Japan                  | 100.4 |
| 78  | Germany                | 100.2 |
| 79  | Estonia                | 99.9  |
| 80  | Tajikistan             | 99.9  |
| 81  | Serbia and Montenegro  | 99.8  |
| 82  | Luxembourg             | 99.4  |
| 83  | Nigeria                | 99.2  |
| 84  | Sweden                 | 99.1  |
| 85  | Slovak Republic        | 99.1  |
| 86  | United States          | 99.0  |
| 87  | Norway                 | 98.9  |
| 88  | Poland                 | 98.9  |
| 89  | Benin                  | 98.9  |
| 90  | Zambia                 | 98.8  |
| 91  | Thailand               | 98.5  |
| 92  | Jordan                 | 98.2  |
| 93  | Kyrgyz Republic        | 98.0  |
| 94  | Vietnam                | 98.0  |
| 95  | Hungary                | 97.9  |
| 96  | Cyprus                 | 97.7  |
| 97  | Sri Lanka              | 97.7  |
| 98  | Macedonia, FYR         | 97.7  |
| 99  | Lithuania              | 97.2  |
| 100 | Azerbaijan             | 96.8  |
| 101 | Kuwait                 | 96.5  |
| 102 | Zimbabwe               | 96.0  |
| 103 | Jamaica                | 95.3  |
| 104 | Georgia                | 95.1  |
| 105 | Mozambique             | 94.9  |
| 106 | Ukraine                | 94.8  |
| 107 | Moldova                | 94.4  |
| 108 | Mauritania             | 94.1  |
| 109 | Croatia                | 94.0  |
| 109 | Singapore              | 94.0  |
| 111 | Turkey                 | 93.3  |
| 112 | Malaysia               | 93.0  |
| 113 | Latvia                 | 92.9  |
| 114 | Bosnia and Herzegovina | 92.0  |
| 115 | United Arab Emirates   | 83.8  |
| 116 | Pakistan               | 82.1  |
| 117 | Gambia                 | 81.4  |
| 118 | Burundi                | 79.9  |
| 119 | Ethiopia               | 77.0  |
| 120 | Chad                   | 71.0  |
| 121 | Mali                   | 63.8  |
| 122 | Burkina Faso           | 53.0  |
| n/a | Angola                 | n/a   |
| n/a | Brazil                 | n/a   |

## 11.02 Secondary education enrollment

Gross secondary education enrollment rate, 2004 or most recent year available

| RANK | COUNTRY/ECONOMY            | HARD DATA | RANK | COUNTRY/ECONOMY             | HARD DATA |
|------|----------------------------|-----------|------|-----------------------------|-----------|
| 1    | Australia.....             | 148.6     | 63   | Romania .....               | 85.1      |
| 2    | Denmark.....               | 124.2     | 64   | Hong Kong SAR .....         | 84.9      |
| 3    | Spain.....                 | 119.1     | 65   | Macedonia, FYR .....        | 84.1      |
| 4    | Netherlands.....           | 118.8     | 66   | Trinidad and Tobago.....    | 83.8      |
| 5    | Norway.....                | 115.6     | 67   | Azerbaijan .....            | 83.1      |
| 6    | Iceland.....               | 114.6     | 68   | Moldova.....                | 82.8      |
| 7    | New Zealand .....          | 114.4     | 69   | Sri Lanka.....              | 82.5      |
| 8    | Ireland.....               | 111.6     | 70   | Georgia.....                | 82.3      |
| 9    | France.....                | 110.6     | 71   | Tajikistan.....             | 81.8      |
| 10   | Barbados .....             | 110.1     | 72   | Tunisia .....               | 81.3      |
| 11   | Finland.....               | 109.4     | 73   | Algeria .....               | 80.7      |
| 12   | Belgium.....               | 108.9     | 74   | Mexico.....                 | 79.7      |
| 13   | Uruguay.....               | 106.0     | 75   | Turkey.....                 | 79.2      |
| 14   | Malta .....                | 105.3     | 76   | Albania.....                | 78.0      |
| 15   | Canada.....                | 105.0     | 77   | Thailand .....              | 77.3      |
| 16   | United Kingdom .....       | 104.5     | 78   | Botswana .....              | 75.1      |
| 17   | Sweden.....                | 102.6     | 79   | Colombia .....              | 74.5      |
| 18   | Bulgaria.....              | 102.1     | 80   | Costa Rica .....            | 73.5      |
| 19   | Brazil.....                | 102.0     | 81   | Vietnam.....                | 73.5      |
| 20   | Japan.....                 | 101.6     | 82   | Suriname .....              | 73.0      |
| 21   | Austria .....              | 100.9     | 83   | China .....                 | 72.5      |
| 22   | Germany.....               | 100.0     | 84   | Venezuela .....             | 72.0      |
| 23   | Slovenia.....              | 99.8      | 85   | Panama.....                 | 70.2      |
| 24   | Italy.....                 | 99.1      | 86   | Malaysia .....              | 70.0      |
| 25   | Argentina.....             | 99.0      | 87   | Dominican Republic .....    | 68.4      |
| 26   | Bahrain.....               | 98.8      | 88   | United Arab Emirates.....   | 66.4      |
| 27   | Taiwan, China .....        | 98.2      | 89   | Honduras.....               | 65.5      |
| 28   | Lithuania.....             | 98.1      | 90   | Paraguay.....               | 65.0      |
| 29   | Estonia.....               | 98.1      | 91   | Indonesia.....              | 64.1      |
| 30   | Kazakhstan .....           | 98.1      | 92   | Nicaragua.....              | 63.7      |
| 31   | Singapore .....            | 98.0      | 93   | Ecuador .....               | 61.1      |
| 32   | Cyprus .....               | 97.7      | 94   | El Salvador.....            | 60.4      |
| 33   | Qatar.....                 | 96.8      | 95   | Namibia .....               | 58.0      |
| 34   | Poland.....                | 96.7      | 96   | India.....                  | 53.5      |
| 35   | Portugal .....             | 96.7      | 97   | Bangladesh.....             | 51.0      |
| 36   | Latvia.....                | 96.6      | 98   | Guatemala .....             | 48.6      |
| 37   | Hungary.....               | 96.5      | 99   | Kenya.....                  | 48.0      |
| 38   | Greece.....                | 96.3      | 100  | Morocco .....               | 47.6      |
| 39   | Czech Republic.....        | 95.7      | 101  | Gambia .....                | 46.9      |
| 40   | Luxembourg .....           | 94.9      | 102  | Bosnia and Herzegovina..... | 45.0      |
| 41   | United States .....        | 94.8      | 103  | Cameroon.....               | 43.8      |
| 42   | Slovak Republic .....      | 94.2      | 104  | Nepal.....                  | 43.0      |
| 43   | Switzerland.....           | 93.4      | 105  | Lesotho .....               | 36.4      |
| 44   | Russian Federation.....    | 92.9      | 106  | Zimbabwe.....               | 36.0      |
| 45   | Ukraine .....              | 92.9      | 107  | Nigeria .....               | 34.6      |
| 46   | Israel.....                | 92.7      | 108  | Cambodia .....              | 29.4      |
| 47   | Peru.....                  | 91.6      | 109  | Malawi.....                 | 28.9      |
| 48   | Armenia.....               | 91.4      | 110  | Ethiopia.....               | 27.8      |
| 49   | Korea, Rep.....            | 90.9      | 111  | Pakistan .....              | 27.2      |
| 50   | South Africa.....          | 90.0      | 112  | Benin .....                 | 25.9      |
| 51   | Kuwait .....               | 89.9      | 113  | Zambia.....                 | 25.8      |
| 52   | Mongolia.....              | 89.5      | 114  | Mali.....                   | 22.3      |
| 53   | Chile .....                | 89.1      | 115  | Mauritania.....             | 20.2      |
| 54   | Bolivia.....               | 88.5      | 116  | Uganda .....                | 18.6      |
| 55   | Serbia and Montenegro..... | 88.5      | 117  | Chad .....                  | 15.1      |
| 56   | Jamaica .....              | 88.1      | 118  | Burundi.....                | 12.1      |
| 57   | Croatia .....              | 88.0      | 119  | Burkina Faso.....           | 12.1      |
| 58   | Kyrgyz Republic.....       | 88.0      | 120  | Mozambique.....             | 10.8      |
| 59   | Jordan.....                | 87.4      | 121  | Tanzania.....               | 7.5       |
| 60   | Egypt.....                 | 87.1      | n/a  | Angola.....                 | n/a       |
| 61   | Philippines .....          | 85.9      | n/a  | Guyana.....                 | n/a       |
| 62   | Mauritius .....            | 85.4      | n/a  | Madagascar .....            | n/a       |

SOURCE: UNESCO, Institute for Statistics; World Bank, *World Development Indicators 2006*; national sources

## 11.03 Quality of the educational system

The educational system in your country (1 = does not meet the needs of a competitive economy, 7 = meets the needs of a competitive economy)

| RANK | COUNTRY/ECONOMY             | SCORE | 1 | MEAN: 3.7 | 7 | SD  | RANK | COUNTRY/ECONOMY          | SCORE | 1 | MEAN: 3.7 | 7 | SD  |
|------|-----------------------------|-------|---|-----------|---|-----|------|--------------------------|-------|---|-----------|---|-----|
| 1    | Finland .....               | 6.0   |   |           |   | 1.0 | 63   | Bosnia and Herzegovina   | 3.5   |   |           |   | 1.7 |
| 2    | Singapore .....             | 6.0   |   |           |   | 0.8 | 64   | Uganda .....             | 3.4   |   |           |   | 1.9 |
| 3    | Iceland .....               | 5.9   |   |           |   | 0.9 | 65   | Mauritius .....          | 3.4   |   |           |   | 1.4 |
| 4    | Switzerland .....           | 5.8   |   |           |   | 1.0 | 66   | El Salvador .....        | 3.4   |   |           |   | 1.3 |
| 5    | Denmark .....               | 5.6   |   |           |   | 1.0 | 67   | Spain .....              | 3.4   |   |           |   | 1.5 |
| 6    | Ireland .....               | 5.5   |   |           |   | 1.0 | 68   | Jamaica .....            | 3.4   |   |           |   | 1.6 |
| 7    | Hong Kong SAR .....         | 5.4   |   |           |   | 1.2 | 69   | Moldova .....            | 3.4   |   |           |   | 1.7 |
| 8    | Belgium .....               | 5.4   |   |           |   | 1.1 | 70   | Sri Lanka .....          | 3.3   |   |           |   | 1.8 |
| 9    | Taiwan, China .....         | 5.4   |   |           |   | 1.0 | 71   | Nigeria .....            | 3.3   |   |           |   | 1.7 |
| 10   | Malaysia .....              | 5.2   |   |           |   | 1.3 | 72   | Italy .....              | 3.3   |   |           |   | 1.5 |
| 11   | Tunisia .....               | 5.1   |   |           |   | 1.1 | 73   | Turkey .....             | 3.2   |   |           |   | 1.5 |
| 12   | Australia .....             | 5.1   |   |           |   | 1.1 | 74   | Pakistan .....           | 3.2   |   |           |   | 1.5 |
| 13   | Austria .....               | 5.1   |   |           |   | 1.2 | 75   | Uruguay .....            | 3.2   |   |           |   | 1.4 |
| 14   | Canada .....                | 5.0   |   |           |   | 1.4 | 76   | Chile .....              | 3.2   |   |           |   | 1.4 |
| 15   | United States .....         | 5.0   |   |           |   | 1.4 | 77   | Guyana .....             | 3.2   |   |           |   | 1.6 |
| 16   | Barbados .....              | 5.0   |   |           |   | 1.3 | 78   | Kyrgyz Republic .....    | 3.2   |   |           |   | 1.7 |
| 17   | Norway .....                | 5.0   |   |           |   | 1.2 | 79   | Bahrain .....            | 3.2   |   |           |   | 1.7 |
| 18   | Netherlands .....           | 4.9   |   |           |   | 1.3 | 80   | Albania .....            | 3.1   |   |           |   | 1.5 |
| 19   | Japan .....                 | 4.9   |   |           |   | 1.3 | 81   | Cambodia .....           | 3.1   |   |           |   | 1.5 |
| 20   | Qatar .....                 | 4.9   |   |           |   | 1.4 | 82   | Mexico .....             | 3.1   |   |           |   | 1.4 |
| 21   | New Zealand .....           | 4.8   |   |           |   | 1.4 | 83   | Bulgaria .....           | 3.1   |   |           |   | 1.5 |
| 22   | Israel .....                | 4.8   |   |           |   | 1.5 | 84   | Tanzania .....           | 3.1   |   |           |   | 1.4 |
| 23   | Indonesia .....             | 4.7   |   |           |   | 0.9 | 85   | Lesotho .....            | 3.1   |   |           |   | 1.7 |
| 24   | Sweden .....                | 4.7   |   |           |   | 1.5 | 86   | Azerbaijan .....         | 3.1   |   |           |   | 1.6 |
| 25   | India .....                 | 4.7   |   |           |   | 1.5 | 87   | China .....              | 3.0   |   |           |   | 1.5 |
| 26   | Cyprus .....                | 4.7   |   |           |   | 1.4 | 88   | Armenia .....            | 3.0   |   |           |   | 1.6 |
| 27   | France .....                | 4.6   |   |           |   | 1.6 | 88   | Cameroon .....           | 3.0   |   |           |   | 1.7 |
| 28   | Malta .....                 | 4.6   |   |           |   | 1.2 | 90   | Madagascar .....         | 3.0   |   |           |   | 1.4 |
| 29   | United Kingdom .....        | 4.5   |   |           |   | 1.5 | 91   | Morocco .....            | 2.9   |   |           |   | 1.5 |
| 30   | Czech Republic .....        | 4.5   |   |           |   | 1.5 | 92   | Algeria .....            | 2.9   |   |           |   | 1.4 |
| 31   | Estonia .....               | 4.4   |   |           |   | 1.4 | 93   | Benin .....              | 2.9   |   |           |   | 1.6 |
| 32   | United Arab Emirates .....  | 4.4   |   |           |   | 1.5 | 94   | Georgia .....            | 2.9   |   |           |   | 1.3 |
| 33   | Germany .....               | 4.4   |   |           |   | 1.4 | 95   | Ethiopia .....           | 2.9   |   |           |   | 1.4 |
| 34   | Poland .....                | 4.4   |   |           |   | 1.1 | 96   | Mongolia .....           | 2.9   |   |           |   | 1.5 |
| 35   | Latvia .....                | 4.4   |   |           |   | 1.6 | 97   | Malawi .....             | 2.9   |   |           |   | 1.8 |
| 36   | Luxembourg .....            | 4.3   |   |           |   | 1.6 | 98   | South Africa .....       | 2.8   |   |           |   | 1.0 |
| 37   | Kenya .....                 | 4.2   |   |           |   | 1.6 | 99   | Argentina .....          | 2.8   |   |           |   | 1.4 |
| 38   | Korea, Rep. ....            | 4.1   |   |           |   | 1.4 | 100  | Vietnam .....            | 2.7   |   |           |   | 1.4 |
| 39   | Zimbabwe .....              | 4.1   |   |           |   | 1.7 | 101  | Nepal .....              | 2.7   |   |           |   | 1.4 |
| 40   | Costa Rica .....            | 4.1   |   |           |   | 1.4 | 102  | Bangladesh .....         | 2.7   |   |           |   | 1.3 |
| 41   | Thailand .....              | 4.1   |   |           |   | 1.4 | 103  | Nicaragua .....          | 2.7   |   |           |   | 1.4 |
| 42   | Hungary .....               | 4.0   |   |           |   | 1.5 | 104  | Egypt .....              | 2.7   |   |           |   | 1.5 |
| 43   | Macedonia, FYR .....        | 4.0   |   |           |   | 1.8 | 105  | Burundi .....            | 2.7   |   |           |   | 1.7 |
| 44   | Jordan .....                | 4.0   |   |           |   | 1.6 | 105  | Panama .....             | 2.7   |   |           |   | 1.3 |
| 45   | Lithuania .....             | 3.9   |   |           |   | 1.4 | 107  | Tajikistan .....         | 2.7   |   |           |   | 1.5 |
| 46   | Serbia and Montenegro ..... | 3.9   |   |           |   | 2.0 | 108  | Namibia .....            | 2.6   |   |           |   | 1.3 |
| 47   | Ukraine .....               | 3.9   |   |           |   | 1.6 | 109  | Mali .....               | 2.6   |   |           |   | 1.5 |
| 48   | Trinidad and Tobago .....   | 3.9   |   |           |   | 1.8 | 110  | Mauritania .....         | 2.6   |   |           |   | 1.2 |
| 49   | Slovak Republic .....       | 3.9   |   |           |   | 1.5 | 111  | Guatemala .....          | 2.6   |   |           |   | 1.2 |
| 50   | Kazakhstan .....            | 3.8   |   |           |   | 1.5 | 112  | Venezuela .....          | 2.6   |   |           |   | 1.3 |
| 51   | Romania .....               | 3.8   |   |           |   | 1.7 | 113  | Mozambique .....         | 2.6   |   |           |   | 1.2 |
| 52   | Slovenia .....              | 3.8   |   |           |   | 1.6 | 114  | Brazil .....             | 2.5   |   |           |   | 1.4 |
| 53   | Croatia .....               | 3.8   |   |           |   | 1.5 | 115  | Burkina Faso .....       | 2.5   |   |           |   | 1.4 |
| 54   | Russian Federation .....    | 3.7   |   |           |   | 1.6 | 116  | Suriname .....           | 2.5   |   |           |   | 1.2 |
| 55   | Gambia .....                | 3.7   |   |           |   | 1.4 | 117  | Dominican Republic ..... | 2.3   |   |           |   | 1.1 |
| 56   | Colombia .....              | 3.7   |   |           |   | 1.5 | 118  | Honduras .....           | 2.3   |   |           |   | 1.2 |
| 57   | Botswana .....              | 3.7   |   |           |   | 1.7 | 119  | Ecuador .....            | 2.3   |   |           |   | 1.1 |
| 58   | Portugal .....              | 3.7   |   |           |   | 1.2 | 120  | Angola .....             | 2.2   |   |           |   | 1.0 |
| 59   | Zambia .....                | 3.6   |   |           |   | 1.9 | 121  | Chad .....               | 2.1   |   |           |   | 1.4 |
| 60   | Greece .....                | 3.6   |   |           |   | 1.6 | 122  | Bolivia .....            | 2.1   |   |           |   | 1.0 |
| 61   | Philippines .....           | 3.6   |   |           |   | 1.6 | 123  | Peru .....               | 2.0   |   |           |   | 0.8 |
| 62   | Kuwait .....                | 3.5   |   |           |   | 1.5 | 124  | Paraguay .....           | 1.9   |   |           |   | 1.0 |

SOURCE: World Economic Forum, Executive Opinion Survey 2006

## 11.04 Local availability of specialized research and training services

In your country, specialized research and training services are (1 = not available, 7 = available from world-class local institutions)

| RANK | COUNTRY/ECONOMY       | SCORE | 1 | MEAN: 3.9 | 7 | SD  | RANK | COUNTRY/ECONOMY        | SCORE | 1 | MEAN: 3.9 | 7 | SD  |
|------|-----------------------|-------|---|-----------|---|-----|------|------------------------|-------|---|-----------|---|-----|
| 1    | Germany               | 6.1   |   |           |   | 0.8 | 63   | Peru                   | 3.9   |   |           |   | 1.5 |
| 1    | Japan                 | 6.1   |   |           |   | 0.8 | 64   | Uruguay                | 3.8   |   |           |   | 1.3 |
| 3    | United Kingdom        | 6.0   |   |           |   | 1.1 | 65   | Cyprus                 | 3.8   |   |           |   | 1.5 |
| 4    | Switzerland           | 6.0   |   |           |   | 0.9 | 66   | Thailand               | 3.8   |   |           |   | 1.2 |
| 5    | United States         | 6.0   |   |           |   | 1.1 | 67   | Kazakhstan             | 3.7   |   |           |   | 1.2 |
| 6    | Finland               | 5.9   |   |           |   | 0.7 | 68   | Azerbaijan             | 3.7   |   |           |   | 1.7 |
| 7    | Netherlands           | 5.8   |   |           |   | 0.8 | 69   | Russian Federation     | 3.7   |   |           |   | 1.4 |
| 8    | Sweden                | 5.8   |   |           |   | 0.7 | 70   | Colombia               | 3.7   |   |           |   | 1.3 |
| 9    | Belgium               | 5.8   |   |           |   | 1.0 | 71   | Bosnia and Herzegovina | 3.6   |   |           |   | 1.4 |
| 10   | Israel                | 5.6   |   |           |   | 1.1 | 72   | Trinidad and Tobago    | 3.6   |   |           |   | 1.5 |
| 11   | Denmark               | 5.6   |   |           |   | 0.9 | 73   | Panama                 | 3.6   |   |           |   | 1.4 |
| 12   | France                | 5.6   |   |           |   | 1.1 | 74   | El Salvador            | 3.5   |   |           |   | 1.4 |
| 13   | Canada                | 5.6   |   |           |   | 1.0 | 75   | Philippines            | 3.5   |   |           |   | 1.4 |
| 14   | Austria               | 5.3   |   |           |   | 1.0 | 76   | Vietnam                | 3.5   |   |           |   | 1.5 |
| 15   | Norway                | 5.2   |   |           |   | 0.9 | 77   | Barbados               | 3.5   |   |           |   | 1.5 |
| 16   | Australia             | 5.2   |   |           |   | 1.2 | 78   | Mongolia               | 3.5   |   |           |   | 1.5 |
| 17   | Singapore             | 5.1   |   |           |   | 1.1 | 79   | Egypt                  | 3.5   |   |           |   | 1.5 |
| 18   | Hong Kong SAR         | 5.1   |   |           |   | 1.2 | 80   | Bulgaria               | 3.5   |   |           |   | 1.5 |
| 19   | Iceland               | 5.1   |   |           |   | 1.2 | 81   | Nicaragua              | 3.4   |   |           |   | 1.4 |
| 20   | Czech Republic        | 5.0   |   |           |   | 1.1 | 82   | Sri Lanka              | 3.4   |   |           |   | 1.5 |
| 21   | Taiwan, China         | 5.0   |   |           |   | 1.1 | 83   | Pakistan               | 3.4   |   |           |   | 1.5 |
| 22   | Malaysia              | 4.9   |   |           |   | 1.3 | 84   | Honduras               | 3.4   |   |           |   | 1.5 |
| 23   | Ireland               | 4.9   |   |           |   | 0.9 | 85   | Mauritius              | 3.4   |   |           |   | 1.4 |
| 24   | Indonesia             | 4.8   |   |           |   | 0.8 | 86   | Ukraine                | 3.4   |   |           |   | 1.1 |
| 25   | New Zealand           | 4.8   |   |           |   | 1.1 | 87   | Macedonia, FYR         | 3.3   |   |           |   | 1.3 |
| 26   | Estonia               | 4.8   |   |           |   | 1.2 | 88   | Malta                  | 3.3   |   |           |   | 1.5 |
| 27   | Italy                 | 4.8   |   |           |   | 1.6 | 89   | Dominican Republic     | 3.3   |   |           |   | 1.6 |
| 28   | India                 | 4.7   |   |           |   | 1.4 | 90   | Ecuador                | 3.3   |   |           |   | 1.4 |
| 29   | Korea, Rep.           | 4.7   |   |           |   | 1.1 | 91   | Burkina Faso           | 3.3   |   |           |   | 1.6 |
| 30   | South Africa          | 4.7   |   |           |   | 1.1 | 92   | Venezuela              | 3.3   |   |           |   | 1.4 |
| 31   | Chile                 | 4.6   |   |           |   | 1.2 | 93   | Mali                   | 3.2   |   |           |   | 1.9 |
| 32   | Brazil                | 4.6   |   |           |   | 1.4 | 94   | Moldova                | 3.2   |   |           |   | 1.3 |
| 33   | Tunisia               | 4.6   |   |           |   | 1.4 | 95   | Cambodia               | 3.1   |   |           |   | 1.4 |
| 34   | Croatia               | 4.5   |   |           |   | 1.3 | 96   | Bahrain                | 3.1   |   |           |   | 1.7 |
| 35   | Spain                 | 4.4   |   |           |   | 1.2 | 97   | Cameroon               | 3.1   |   |           |   | 1.5 |
| 36   | Hungary               | 4.4   |   |           |   | 1.2 | 98   | Benin                  | 3.1   |   |           |   | 1.6 |
| 37   | Slovenia              | 4.4   |   |           |   | 1.2 | 99   | Madagascar             | 3.1   |   |           |   | 1.4 |
| 38   | Portugal              | 4.4   |   |           |   | 1.2 | 100  | Algeria                | 3.0   |   |           |   | 1.4 |
| 39   | Poland                | 4.4   |   |           |   | 0.9 | 101  | Botswana               | 3.0   |   |           |   | 1.4 |
| 40   | Costa Rica            | 4.3   |   |           |   | 1.4 | 102  | Bolivia                | 2.9   |   |           |   | 1.4 |
| 41   | Turkey                | 4.3   |   |           |   | 1.1 | 103  | Kyrgyz Republic        | 2.9   |   |           |   | 1.4 |
| 42   | United Arab Emirates  | 4.3   |   |           |   | 1.6 | 104  | Armenia                | 2.9   |   |           |   | 1.3 |
| 43   | Argentina             | 4.3   |   |           |   | 1.5 | 105  | Malawi                 | 2.9   |   |           |   | 1.6 |
| 44   | Romania               | 4.3   |   |           |   | 1.3 | 106  | Tajikistan             | 2.9   |   |           |   | 1.4 |
| 45   | Slovak Republic       | 4.2   |   |           |   | 1.2 | 107  | Georgia                | 2.8   |   |           |   | 1.3 |
| 46   | China                 | 4.2   |   |           |   | 1.3 | 108  | Paraguay               | 2.8   |   |           |   | 1.4 |
| 47   | Mexico                | 4.2   |   |           |   | 1.4 | 108  | Zimbabwe               | 2.8   |   |           |   | 1.4 |
| 48   | Lithuania             | 4.2   |   |           |   | 1.1 | 110  | Ethiopia               | 2.6   |   |           |   | 1.4 |
| 49   | Kenya                 | 4.2   |   |           |   | 1.5 | 111  | Mozambique             | 2.6   |   |           |   | 1.3 |
| 50   | Latvia                | 4.1   |   |           |   | 1.3 | 112  | Gambia                 | 2.6   |   |           |   | 1.2 |
| 51   | Luxembourg            | 4.1   |   |           |   | 1.5 | 113  | Guyana                 | 2.5   |   |           |   | 1.3 |
| 52   | Serbia and Montenegro | 4.0   |   |           |   | 1.5 | 114  | Nepal                  | 2.5   |   |           |   | 1.1 |
| 53   | Kuwait                | 4.0   |   |           |   | 1.5 | 115  | Suriname               | 2.5   |   |           |   | 1.3 |
| 54   | Tanzania              | 4.0   |   |           |   | 1.7 | 116  | Chad                   | 2.5   |   |           |   | 1.7 |
| 55   | Guatemala             | 3.9   |   |           |   | 1.3 | 117  | Lesotho                | 2.5   |   |           |   | 1.5 |
| 56   | Jamaica               | 3.9   |   |           |   | 1.5 | 118  | Albania                | 2.5   |   |           |   | 1.3 |
| 57   | Qatar                 | 3.9   |   |           |   | 1.9 | 119  | Namibia                | 2.4   |   |           |   | 1.1 |
| 58   | Morocco               | 3.9   |   |           |   | 1.7 | 120  | Bangladesh             | 2.4   |   |           |   | 1.4 |
| 59   | Greece                | 3.9   |   |           |   | 1.3 | 121  | Mauritania             | 2.2   |   |           |   | 1.8 |
| 60   | Nigeria               | 3.9   |   |           |   | 1.8 | 122  | Angola                 | 2.2   |   |           |   | 1.3 |
| 61   | Uganda                | 3.9   |   |           |   | 1.6 | 123  | Burundi                | 2.2   |   |           |   | 1.4 |
| 62   | Jordan                | 3.9   |   |           |   | 1.5 | 124  | Zambia                 | 2.2   |   |           |   | 1.2 |

SOURCE: World Economic Forum, Executive Opinion Survey 2006

## 11.05 Extent of staff training

The general approach of companies in your country to human resources is (1 = to invest little in training and employee development, 7 = to invest heavily to attract, train, and retain employees)

| RANK | COUNTRY/ECONOMY            | SCORE | 1 | MEAN: 3.8 | 7 | SD  | RANK | COUNTRY/ECONOMY              | SCORE | 1 | MEAN: 3.8 | 7 | SD  |
|------|----------------------------|-------|---|-----------|---|-----|------|------------------------------|-------|---|-----------|---|-----|
| 1    | Switzerland .....          | 6.1   |   |           |   | 0.8 | 63   | El Salvador .....            | 3.6   |   |           |   | 1.2 |
| 2    | Denmark .....              | 5.9   |   |           |   | 0.9 | 64   | Namibia .....                | 3.6   |   |           |   | 1.3 |
| 3    | Japan .....                | 5.9   |   |           |   | 0.9 | 65   | Nigeria .....                | 3.5   |   |           |   | 1.7 |
| 3    | Sweden .....               | 5.9   |   |           |   | 0.8 | 66   | Peru .....                   | 3.5   |   |           |   | 1.3 |
| 5    | Austria .....              | 5.8   |   |           |   | 0.9 | 67   | Colombia .....               | 3.5   |   |           |   | 1.2 |
| 6    | Netherlands .....          | 5.7   |   |           |   | 0.8 | 68   | Botswana .....               | 3.5   |   |           |   | 1.4 |
| 7    | Germany .....              | 5.7   |   |           |   | 1.0 | 69   | Macedonia, FYR .....         | 3.5   |   |           |   | 1.5 |
| 8    | Finland .....              | 5.6   |   |           |   | 0.9 | 70   | Cyprus .....                 | 3.4   |   |           |   | 1.1 |
| 9    | United States .....        | 5.6   |   |           |   | 1.2 | 71   | Vietnam .....                | 3.4   |   |           |   | 1.4 |
| 10   | Norway .....               | 5.5   |   |           |   | 0.9 | 72   | Argentina .....              | 3.4   |   |           |   | 1.1 |
| 11   | Iceland .....              | 5.4   |   |           |   | 1.0 | 73   | Guatemala .....              | 3.4   |   |           |   | 1.2 |
| 12   | Singapore .....            | 5.4   |   |           |   | 1.0 | 74   | Uganda .....                 | 3.4   |   |           |   | 1.7 |
| 13   | Belgium .....              | 5.4   |   |           |   | 1.1 | 75   | Sri Lanka .....              | 3.4   |   |           |   | 1.3 |
| 14   | Luxembourg .....           | 5.4   |   |           |   | 1.1 | 76   | China .....                  | 3.4   |   |           |   | 1.3 |
| 15   | Ireland .....              | 5.4   |   |           |   | 1.0 | 77   | Mauritania .....             | 3.3   |   |           |   | 1.8 |
| 16   | United Kingdom .....       | 5.3   |   |           |   | 1.2 | 78   | Mozambique .....             | 3.3   |   |           |   | 1.4 |
| 17   | Malaysia .....             | 5.3   |   |           |   | 1.1 | 79   | Kazakhstan .....             | 3.3   |   |           |   | 1.4 |
| 18   | Korea, Rep. ....           | 5.2   |   |           |   | 1.0 | 80   | Uruguay .....                | 3.3   |   |           |   | 1.1 |
| 19   | Taiwan, China .....        | 5.2   |   |           |   | 1.0 | 81   | Romania .....                | 3.3   |   |           |   | 1.2 |
| 20   | Australia .....            | 5.1   |   |           |   | 1.0 | 82   | Venezuela .....              | 3.3   |   |           |   | 1.1 |
| 21   | Hong Kong SAR .....        | 5.1   |   |           |   | 1.1 | 83   | Egypt .....                  | 3.3   |   |           |   | 1.7 |
| 22   | France .....               | 5.1   |   |           |   | 1.2 | 84   | Mongolia .....               | 3.2   |   |           |   | 1.6 |
| 23   | Israel .....               | 5.1   |   |           |   | 1.0 | 85   | Morocco .....                | 3.2   |   |           |   | 1.5 |
| 24   | Canada .....               | 5.0   |   |           |   | 1.2 | 86   | Malawi .....                 | 3.2   |   |           |   | 1.4 |
| 25   | New Zealand .....          | 5.0   |   |           |   | 0.8 | 87   | Tanzania .....               | 3.1   |   |           |   | 1.3 |
| 26   | South Africa .....         | 4.9   |   |           |   | 1.1 | 88   | Gambia .....                 | 3.1   |   |           |   | 1.3 |
| 27   | Estonia .....              | 4.8   |   |           |   | 1.1 | 89   | Cambodia .....               | 3.1   |   |           |   | 1.5 |
| 28   | India .....                | 4.8   |   |           |   | 1.3 | 90   | Dominican Republic .....     | 3.1   |   |           |   | 1.3 |
| 29   | Czech Republic .....       | 4.7   |   |           |   | 1.1 | 91   | Pakistan .....               | 3.1   |   |           |   | 1.5 |
| 30   | Thailand .....             | 4.6   |   |           |   | 1.1 | 92   | Lesotho .....                | 3.1   |   |           |   | 1.4 |
| 31   | Costa Rica .....           | 4.5   |   |           |   | 1.2 | 93   | Honduras .....               | 3.1   |   |           |   | 1.4 |
| 32   | Slovenia .....             | 4.4   |   |           |   | 1.2 | 94   | Azerbaijan .....             | 3.0   |   |           |   | 1.3 |
| 33   | Mauritius .....            | 4.4   |   |           |   | 1.0 | 95   | Bosnia and Herzegovina ..... | 3.0   |   |           |   | 1.5 |
| 34   | Chile .....                | 4.4   |   |           |   | 1.1 | 95   | Georgia .....                | 3.0   |   |           |   | 1.2 |
| 35   | Philippines .....          | 4.3   |   |           |   | 1.2 | 97   | Guyana .....                 | 3.0   |   |           |   | 1.3 |
| 36   | Tunisia .....              | 4.3   |   |           |   | 1.5 | 98   | Algeria .....                | 3.0   |   |           |   | 1.4 |
| 37   | United Arab Emirates ..... | 4.3   |   |           |   | 1.6 | 99   | Russian Federation .....     | 2.9   |   |           |   | 1.3 |
| 38   | Brazil .....               | 4.2   |   |           |   | 1.3 | 100  | Ukraine .....                | 2.9   |   |           |   | 1.2 |
| 39   | Turkey .....               | 4.2   |   |           |   | 1.1 | 101  | Madagascar .....             | 2.9   |   |           |   | 1.3 |
| 40   | Indonesia .....            | 4.2   |   |           |   | 0.9 | 102  | Moldova .....                | 2.9   |   |           |   | 1.3 |
| 41   | Spain .....                | 4.0   |   |           |   | 1.2 | 103  | Armenia .....                | 2.8   |   |           |   | 1.3 |
| 42   | Latvia .....               | 4.0   |   |           |   | 1.4 | 104  | Ecuador .....                | 2.8   |   |           |   | 1.1 |
| 43   | Lithuania .....            | 4.0   |   |           |   | 1.4 | 105  | Nicaragua .....              | 2.7   |   |           |   | 1.2 |
| 44   | Malta .....                | 4.0   |   |           |   | 1.2 | 106  | Burkina Faso .....           | 2.7   |   |           |   | 1.5 |
| 45   | Slovak Republic .....      | 4.0   |   |           |   | 1.2 | 107  | Angola .....                 | 2.7   |   |           |   | 1.2 |
| 46   | Kuwait .....               | 3.9   |   |           |   | 1.6 | 108  | Benin .....                  | 2.7   |   |           |   | 1.5 |
| 47   | Mexico .....               | 3.9   |   |           |   | 1.3 | 109  | Suriname .....               | 2.7   |   |           |   | 1.2 |
| 48   | Poland .....               | 3.8   |   |           |   | 0.9 | 110  | Tajikistan .....             | 2.7   |   |           |   | 1.4 |
| 49   | Barbados .....             | 3.8   |   |           |   | 1.3 | 111  | Albania .....                | 2.7   |   |           |   | 1.3 |
| 50   | Zimbabwe .....             | 3.8   |   |           |   | 1.2 | 112  | Cameroon .....               | 2.7   |   |           |   | 1.4 |
| 51   | Trinidad and Tobago .....  | 3.8   |   |           |   | 1.4 | 113  | Bulgaria .....               | 2.6   |   |           |   | 1.2 |
| 52   | Greece .....               | 3.8   |   |           |   | 1.2 | 114  | Paraguay .....               | 2.6   |   |           |   | 1.1 |
| 53   | Hungary .....              | 3.8   |   |           |   | 1.3 | 115  | Bangladesh .....             | 2.6   |   |           |   | 1.1 |
| 54   | Jamaica .....              | 3.8   |   |           |   | 1.2 | 116  | Bolivia .....                | 2.5   |   |           |   | 1.0 |
| 55   | Portugal .....             | 3.8   |   |           |   | 0.9 | 117  | Mali .....                   | 2.5   |   |           |   | 1.3 |
| 56   | Kenya .....                | 3.7   |   |           |   | 1.5 | 118  | Nepal .....                  | 2.4   |   |           |   | 1.0 |
| 57   | Qatar .....                | 3.7   |   |           |   | 1.7 | 119  | Ethiopia .....               | 2.4   |   |           |   | 1.0 |
| 58   | Panama .....               | 3.7   |   |           |   | 1.3 | 120  | Kyrgyz Republic .....        | 2.4   |   |           |   | 1.3 |
| 59   | Bahrain .....              | 3.7   |   |           |   | 1.8 | 121  | Serbia and Montenegro .....  | 2.3   |   |           |   | 1.1 |
| 60   | Jordan .....               | 3.6   |   |           |   | 1.5 | 122  | Burundi .....                | 2.2   |   |           |   | 1.3 |
| 61   | Croatia .....              | 3.6   |   |           |   | 1.3 | 123  | Chad .....                   | 1.8   |   |           |   | 1.2 |
| 62   | Italy .....                | 3.6   |   |           |   | 1.3 | 124  | Zambia .....                 | 1.7   |   |           |   | 1.1 |

SOURCE: World Economic Forum, Executive Opinion Survey 2006



## 11.06 Hiring and firing practices

The hiring and firing of workers is (1 = impeded by regulations, 7 = flexibly determined by employers)

| RANK | COUNTRY/ECONOMY       | SCORE | 1 | MEAN: 3.9 | 7 | SD  | RANK | COUNTRY/ECONOMY        | SCORE | 1 | MEAN: 3.9 | 7 | SD  |
|------|-----------------------|-------|---|-----------|---|-----|------|------------------------|-------|---|-----------|---|-----|
| 1    | Zambia                | 5.9   |   |           |   | 1.8 | 63   | Burkina Faso           | 3.9   |   |           |   | 1.7 |
| 2    | Singapore             | 5.9   |   |           |   | 1.0 | 64   | Poland                 | 3.9   |   |           |   | 1.2 |
| 3    | Mauritania            | 5.7   |   |           |   | 1.5 | 65   | Thailand               | 3.8   |   |           |   | 1.8 |
| 4    | Switzerland           | 5.7   |   |           |   | 1.2 | 66   | Korea, Rep.            | 3.8   |   |           |   | 1.7 |
| 5    | Azerbaijan            | 5.7   |   |           |   | 1.4 | 67   | Mexico                 | 3.8   |   |           |   | 1.8 |
| 6    | Iceland               | 5.6   |   |           |   | 1.8 | 68   | Cambodia               | 3.8   |   |           |   | 2.0 |
| 7    | Kazakhstan            | 5.6   |   |           |   | 1.2 | 69   | Hungary                | 3.8   |   |           |   | 1.7 |
| 8    | Denmark               | 5.4   |   |           |   | 1.7 | 70   | Japan                  | 3.8   |   |           |   | 1.8 |
| 9    | Kyrgyz Republic       | 5.4   |   |           |   | 1.5 | 71   | Australia              | 3.8   |   |           |   | 1.6 |
| 10   | Dominican Republic    | 5.3   |   |           |   | 1.4 | 72   | Luxembourg             | 3.8   |   |           |   | 1.7 |
| 11   | United States         | 5.2   |   |           |   | 1.5 | 73   | Bosnia and Herzegovina | 3.7   |   |           |   | 1.7 |
| 12   | Mongolia              | 5.2   |   |           |   | 1.7 | 74   | Ethiopia               | 3.7   |   |           |   | 1.7 |
| 13   | Hong Kong SAR         | 5.1   |   |           |   | 2.0 | 75   | Malawi                 | 3.7   |   |           |   | 1.5 |
| 14   | Uganda                | 5.1   |   |           |   | 1.6 | 76   | Bulgaria               | 3.7   |   |           |   | 1.7 |
| 15   | Slovak Republic       | 5.1   |   |           |   | 1.4 | 77   | Indonesia              | 3.7   |   |           |   | 0.9 |
| 16   | Georgia               | 5.1   |   |           |   | 1.4 | 78   | Lesotho                | 3.7   |   |           |   | 1.9 |
| 17   | Russian Federation    | 5.1   |   |           |   | 1.6 | 79   | New Zealand            | 3.7   |   |           |   | 1.7 |
| 18   | Albania               | 5.0   |   |           |   | 1.8 | 80   | Angola                 | 3.6   |   |           |   | 1.3 |
| 19   | Nigeria               | 5.0   |   |           |   | 1.8 | 81   | Algeria                | 3.6   |   |           |   | 1.9 |
| 20   | Ukraine               | 4.8   |   |           |   | 1.8 | 82   | Philippines            | 3.6   |   |           |   | 1.8 |
| 21   | El Salvador           | 4.8   |   |           |   | 1.8 | 83   | Chad                   | 3.6   |   |           |   | 1.9 |
| 22   | Tajikistan            | 4.8   |   |           |   | 2.0 | 84   | Austria                | 3.6   |   |           |   | 1.6 |
| 23   | United Arab Emirates  | 4.7   |   |           |   | 1.8 | 85   | Romania                | 3.5   |   |           |   | 1.6 |
| 24   | Guyana                | 4.6   |   |           |   | 1.5 | 86   | Botswana               | 3.5   |   |           |   | 1.8 |
| 25   | Bangladesh            | 4.6   |   |           |   | 1.9 | 87   | Malta                  | 3.5   |   |           |   | 1.5 |
| 26   | Pakistan              | 4.6   |   |           |   | 1.4 | 88   | Turkey                 | 3.4   |   |           |   | 1.6 |
| 27   | Taiwan, China         | 4.6   |   |           |   | 1.5 | 89   | Ireland                | 3.4   |   |           |   | 1.5 |
| 28   | Guatemala             | 4.5   |   |           |   | 1.7 | 90   | Jordan                 | 3.3   |   |           |   | 1.7 |
| 29   | Gambia                | 4.5   |   |           |   | 1.7 | 91   | Finland                | 3.3   |   |           |   | 1.7 |
| 30   | Kenya                 | 4.5   |   |           |   | 1.9 | 92   | Peru                   | 3.2   |   |           |   | 1.5 |
| 31   | Qatar                 | 4.5   |   |           |   | 1.8 | 93   | Namibia                | 3.2   |   |           |   | 1.6 |
| 32   | Tunisia               | 4.5   |   |           |   | 1.4 | 94   | Cyprus                 | 3.2   |   |           |   | 1.6 |
| 32   | United Kingdom        | 4.5   |   |           |   | 1.5 | 95   | Nepal                  | 3.1   |   |           |   | 1.6 |
| 34   | Burundi               | 4.5   |   |           |   | 1.8 | 96   | Lithuania              | 3.1   |   |           |   | 1.6 |
| 35   | Israel                | 4.4   |   |           |   | 1.4 | 97   | Egypt                  | 3.1   |   |           |   | 1.7 |
| 36   | Moldova               | 4.4   |   |           |   | 1.7 | 98   | Sri Lanka              | 3.0   |   |           |   | 1.8 |
| 37   | Cameroon              | 4.4   |   |           |   | 1.7 | 99   | Panama                 | 3.0   |   |           |   | 1.7 |
| 38   | Nicaragua             | 4.4   |   |           |   | 1.8 | 100  | India                  | 3.0   |   |           |   | 1.7 |
| 39   | Benin                 | 4.4   |   |           |   | 1.7 | 101  | Uruguay                | 3.0   |   |           |   | 1.5 |
| 40   | Mali                  | 4.3   |   |           |   | 1.8 | 102  | Czech Republic         | 3.0   |   |           |   | 1.5 |
| 41   | Kuwait                | 4.3   |   |           |   | 2.1 | 102  | Paraguay               | 3.0   |   |           |   | 1.8 |
| 42   | Costa Rica            | 4.3   |   |           |   | 1.8 | 104  | Bahrain                | 2.9   |   |           |   | 1.7 |
| 43   | Bolivia               | 4.3   |   |           |   | 1.7 | 105  | Ecuador                | 2.9   |   |           |   | 1.6 |
| 44   | Canada                | 4.3   |   |           |   | 1.5 | 106  | Netherlands            | 2.9   |   |           |   | 1.5 |
| 45   | Vietnam               | 4.2   |   |           |   | 1.7 | 107  | Mozambique             | 2.8   |   |           |   | 1.5 |
| 46   | Madagascar            | 4.2   |   |           |   | 1.7 | 108  | Greece                 | 2.8   |   |           |   | 1.3 |
| 47   | Trinidad and Tobago   | 4.2   |   |           |   | 1.8 | 109  | Slovenia               | 2.8   |   |           |   | 1.5 |
| 48   | Estonia               | 4.2   |   |           |   | 1.6 | 110  | Portugal               | 2.7   |   |           |   | 1.2 |
| 49   | Morocco               | 4.2   |   |           |   | 1.8 | 111  | Brazil                 | 2.7   |   |           |   | 1.7 |
| 50   | China                 | 4.2   |   |           |   | 1.5 | 112  | Norway                 | 2.7   |   |           |   | 1.7 |
| 51   | Jamaica               | 4.2   |   |           |   | 1.6 | 113  | Spain                  | 2.7   |   |           |   | 1.3 |
| 52   | Latvia                | 4.2   |   |           |   | 1.8 | 114  | Italy                  | 2.7   |   |           |   | 1.5 |
| 53   | Armenia               | 4.1   |   |           |   | 1.8 | 115  | Mauritius              | 2.6   |   |           |   | 1.4 |
| 54   | Croatia               | 4.1   |   |           |   | 1.7 | 115  | Zimbabwe               | 2.6   |   |           |   | 1.3 |
| 55   | Honduras              | 4.1   |   |           |   | 1.8 | 117  | Belgium                | 2.6   |   |           |   | 1.5 |
| 56   | Tanzania              | 4.1   |   |           |   | 1.7 | 118  | Argentina              | 2.5   |   |           |   | 1.3 |
| 57   | Macedonia, FYR        | 4.0   |   |           |   | 1.8 | 119  | Germany                | 2.5   |   |           |   | 1.4 |
| 58   | Colombia              | 4.0   |   |           |   | 1.6 | 120  | South Africa           | 2.4   |   |           |   | 1.1 |
| 59   | Malaysia              | 4.0   |   |           |   | 1.8 | 121  | Suriname               | 2.4   |   |           |   | 1.4 |
| 60   | Barbados              | 4.0   |   |           |   | 1.5 | 122  | France                 | 2.4   |   |           |   | 1.2 |
| 61   | Serbia and Montenegro | 4.0   |   |           |   | 1.8 | 123  | Sweden                 | 2.2   |   |           |   | 1.1 |
| 62   | Chile                 | 4.0   |   |           |   | 1.7 | 124  | Venezuela              | 2.0   |   |           |   | 1.3 |

SOURCE: World Economic Forum, Executive Opinion Survey 2006

## 11.07 Difficulty of hiring foreign labor

Labor regulation in your country (1 = prevents your company from employing foreign labor, 7 = does not prevent your company from employing foreign labor)

| RANK | COUNTRY/ECONOMY            | SCORE | 1 | MEAN: 4.8 | 7 | SD  | RANK | COUNTRY/ECONOMY             | SCORE | 1 | MEAN: 4.8 | 7 | SD  |
|------|----------------------------|-------|---|-----------|---|-----|------|-----------------------------|-------|---|-----------|---|-----|
| 1    | Kuwait.....                | 6.3   |   |           |   | 1.2 | 63   | Vietnam.....                | 4.8   |   |           |   | 1.7 |
| 2    | Ireland.....               | 6.0   |   |           |   | 1.1 | 64   | Guatemala.....              | 4.8   |   |           |   | 1.7 |
| 3    | Georgia.....               | 6.0   |   |           |   | 1.2 | 65   | Pakistan.....               | 4.8   |   |           |   | 1.6 |
| 4    | Slovak Republic.....       | 6.0   |   |           |   | 1.1 | 66   | Hungary.....                | 4.7   |   |           |   | 1.7 |
| 5    | Armenia.....               | 5.9   |   |           |   | 1.4 | 67   | Turkey.....                 | 4.7   |   |           |   | 1.6 |
| 6    | Singapore.....             | 5.9   |   |           |   | 1.1 | 68   | New Zealand.....            | 4.7   |   |           |   | 1.4 |
| 7    | Nicaragua.....             | 5.8   |   |           |   | 1.4 | 69   | Tajikistan.....             | 4.7   |   |           |   | 1.9 |
| 8    | Albania.....               | 5.7   |   |           |   | 1.8 | 70   | France.....                 | 4.7   |   |           |   | 1.6 |
| 9    | El Salvador.....           | 5.7   |   |           |   | 1.1 | 71   | Angola.....                 | 4.7   |   |           |   | 1.8 |
| 10   | Dominican Republic.....    | 5.7   |   |           |   | 1.5 | 72   | Macedonia, FYR.....         | 4.7   |   |           |   | 1.6 |
| 11   | Luxembourg.....            | 5.7   |   |           |   | 1.6 | 73   | China.....                  | 4.6   |   |           |   | 1.4 |
| 12   | Zambia.....                | 5.6   |   |           |   | 1.6 | 74   | Brazil.....                 | 4.6   |   |           |   | 1.8 |
| 13   | United Kingdom.....        | 5.6   |   |           |   | 1.2 | 75   | Taiwan, China.....          | 4.6   |   |           |   | 1.6 |
| 14   | Indonesia.....             | 5.6   |   |           |   | 1.0 | 76   | Japan.....                  | 4.6   |   |           |   | 1.6 |
| 15   | Finland.....               | 5.5   |   |           |   | 1.3 | 77   | Estonia.....                | 4.5   |   |           |   | 1.6 |
| 16   | Paraguay.....              | 5.5   |   |           |   | 1.6 | 78   | Lithuania.....              | 4.5   |   |           |   | 1.6 |
| 17   | Uganda.....                | 5.5   |   |           |   | 1.6 | 79   | Madagascar.....             | 4.5   |   |           |   | 1.7 |
| 18   | Portugal.....              | 5.5   |   |           |   | 1.3 | 80   | Belgium.....                | 4.5   |   |           |   | 1.6 |
| 19   | Peru.....                  | 5.5   |   |           |   | 1.5 | 81   | Netherlands.....            | 4.5   |   |           |   | 1.5 |
| 20   | United Arab Emirates.....  | 5.5   |   |           |   | 1.6 | 82   | Australia.....              | 4.4   |   |           |   | 1.6 |
| 21   | Iceland.....               | 5.5   |   |           |   | 1.2 | 83   | Jordan.....                 | 4.4   |   |           |   | 1.8 |
| 22   | Mauritania.....            | 5.5   |   |           |   | 2.0 | 84   | Thailand.....               | 4.4   |   |           |   | 1.6 |
| 23   | Qatar.....                 | 5.4   |   |           |   | 1.5 | 85   | Mongolia.....               | 4.4   |   |           |   | 1.9 |
| 24   | Hong Kong SAR.....         | 5.4   |   |           |   | 1.5 | 86   | Slovenia.....               | 4.4   |   |           |   | 1.6 |
| 25   | Chile.....                 | 5.4   |   |           |   | 1.5 | 87   | Sweden.....                 | 4.4   |   |           |   | 2.0 |
| 26   | Switzerland.....           | 5.4   |   |           |   | 1.3 | 88   | Kenya.....                  | 4.4   |   |           |   | 1.9 |
| 27   | Egypt.....                 | 5.4   |   |           |   | 1.8 | 89   | Croatia.....                | 4.4   |   |           |   | 1.5 |
| 28   | India.....                 | 5.4   |   |           |   | 1.5 | 90   | Kyrgyz Republic.....        | 4.4   |   |           |   | 1.9 |
| 29   | Uruguay.....               | 5.4   |   |           |   | 1.7 | 91   | Bulgaria.....               | 4.3   |   |           |   | 1.6 |
| 30   | Czech Republic.....        | 5.3   |   |           |   | 1.5 | 92   | Malta.....                  | 4.3   |   |           |   | 1.6 |
| 31   | Guyana.....                | 5.3   |   |           |   | 1.5 | 93   | Cyprus.....                 | 4.3   |   |           |   | 1.9 |
| 32   | Norway.....                | 5.3   |   |           |   | 1.2 | 93   | Trinidad and Tobago.....    | 4.3   |   |           |   | 1.7 |
| 33   | Jamaica.....               | 5.3   |   |           |   | 1.4 | 95   | Israel.....                 | 4.3   |   |           |   | 1.8 |
| 34   | Nigeria.....               | 5.3   |   |           |   | 1.7 | 96   | Romania.....                | 4.3   |   |           |   | 1.6 |
| 35   | Burkina Faso.....          | 5.3   |   |           |   | 1.8 | 97   | Ethiopia.....               | 4.2   |   |           |   | 2.0 |
| 36   | Azerbaijan.....            | 5.2   |   |           |   | 1.7 | 98   | Canada.....                 | 4.2   |   |           |   | 1.7 |
| 37   | Benin.....                 | 5.2   |   |           |   | 1.7 | 99   | Barbados.....               | 4.2   |   |           |   | 1.7 |
| 38   | Malaysia.....              | 5.2   |   |           |   | 1.4 | 100  | Venezuela.....              | 4.2   |   |           |   | 1.9 |
| 39   | Mali.....                  | 5.2   |   |           |   | 1.9 | 101  | Ukraine.....                | 4.2   |   |           |   | 1.9 |
| 40   | Argentina.....             | 5.1   |   |           |   | 1.9 | 102  | Sri Lanka.....              | 4.2   |   |           |   | 2.0 |
| 41   | Morocco.....               | 5.1   |   |           |   | 1.7 | 103  | Poland.....                 | 4.2   |   |           |   | 1.2 |
| 42   | Spain.....                 | 5.1   |   |           |   | 1.6 | 104  | Philippines.....            | 4.1   |   |           |   | 1.6 |
| 43   | United States.....         | 5.1   |   |           |   | 1.4 | 105  | Ecuador.....                | 4.1   |   |           |   | 1.8 |
| 44   | Costa Rica.....            | 5.1   |   |           |   | 1.5 | 106  | Bosnia and Herzegovina..... | 4.1   |   |           |   | 1.9 |
| 45   | Gambia.....                | 5.0   |   |           |   | 1.6 | 107  | Bahrain.....                | 4.0   |   |           |   | 2.1 |
| 46   | Suriname.....              | 5.0   |   |           |   | 2.0 | 107  | Mauritius.....              | 4.0   |   |           |   | 1.9 |
| 47   | Bolivia.....               | 5.0   |   |           |   | 1.7 | 109  | Russian Federation.....     | 4.0   |   |           |   | 1.8 |
| 48   | Serbia and Montenegro..... | 5.0   |   |           |   | 1.7 | 110  | Panama.....                 | 3.9   |   |           |   | 1.8 |
| 49   | Colombia.....              | 5.0   |   |           |   | 1.7 | 111  | Kazakhstan.....             | 3.9   |   |           |   | 1.7 |
| 50   | Latvia.....                | 4.9   |   |           |   | 1.6 | 112  | Austria.....                | 3.9   |   |           |   | 1.7 |
| 51   | Tanzania.....              | 4.9   |   |           |   | 1.8 | 113  | Chad.....                   | 3.8   |   |           |   | 2.0 |
| 52   | Denmark.....               | 4.9   |   |           |   | 1.6 | 114  | Lesotho.....                | 3.8   |   |           |   | 2.1 |
| 53   | Honduras.....              | 4.9   |   |           |   | 1.8 | 115  | Bangladesh.....             | 3.8   |   |           |   | 1.8 |
| 54   | Mexico.....                | 4.9   |   |           |   | 1.8 | 116  | Botswana.....               | 3.8   |   |           |   | 1.9 |
| 55   | Cameroon.....              | 4.9   |   |           |   | 1.9 | 117  | Algeria.....                | 3.7   |   |           |   | 1.9 |
| 56   | Italy.....                 | 4.8   |   |           |   | 1.7 | 118  | Korea, Rep.....             | 3.7   |   |           |   | 1.4 |
| 57   | Greece.....                | 4.8   |   |           |   | 1.6 | 119  | Malawi.....                 | 3.7   |   |           |   | 1.8 |
| 58   | Germany.....               | 4.8   |   |           |   | 1.5 | 120  | Mozambique.....             | 3.4   |   |           |   | 1.7 |
| 59   | Moldova.....               | 4.8   |   |           |   | 2.1 | 121  | South Africa.....           | 3.3   |   |           |   | 1.5 |
| 60   | Burundi.....               | 4.8   |   |           |   | 2.0 | 122  | Nepal.....                  | 3.0   |   |           |   | 1.7 |
| 61   | Tunisia.....               | 4.8   |   |           |   | 1.8 | 123  | Zimbabwe.....               | 2.9   |   |           |   | 1.8 |
| 62   | Cambodia.....              | 4.8   |   |           |   | 1.8 | 124  | Namibia.....                | 2.6   |   |           |   | 1.4 |

SOURCE: World Economic Forum, Executive Opinion Survey 2006

## 11.08 HIV prevalence

HIV prevalence as a percentage of adults aged 15–49 years, 2003 or most recent year available

RANK COUNTRY/ECONOMY HARD DATA

|    |                              |      |
|----|------------------------------|------|
| 1  | Azerbaijan.....              | <0.1 |
| 1  | Bosnia and Herzegovina ..... | <0.1 |
| 1  | Bulgaria .....               | <0.1 |
| 1  | Croatia .....                | <0.1 |
| 1  | Cyprus.....                  | <0.1 |
| 1  | Egypt.....                   | <0.1 |
| 1  | Hong Kong SAR .....          | <0.1 |
| 1  | Japan.....                   | <0.1 |
| 1  | Jordan .....                 | <0.1 |
| 1  | Korea, Rep. ....             | <0.1 |
| 1  | Kuwait .....                 | <0.1 |
| 1  | Macedonia, FYR.....          | <0.1 |
| 1  | Mauritius.....               | <0.1 |
| 1  | Mongolia .....               | <0.1 |
| 1  | Philippines.....             | <0.1 |
| 1  | Qatar .....                  | <0.1 |
| 1  | Romania .....                | <0.1 |
| 1  | Slovak Republic.....         | <0.1 |
| 1  | Slovenia.....                | <0.1 |
| 1  | Sri Lanka .....              | <0.1 |
| 1  | Taiwan, China.....           | <0.1 |
| 1  | Tajikistan .....             | <0.1 |
| 1  | Tunisia .....                | <0.1 |
| 1  | Turkey .....                 | <0.1 |
| 25 | Albania.....                 | .0.1 |
| 25 | Algeria.....                 | .0.1 |
| 25 | Armenia .....                | .0.1 |
| 25 | Australia.....               | .0.1 |
| 25 | Bolivia .....                | .0.1 |
| 25 | China .....                  | .0.1 |
| 25 | Czech Republic.....          | .0.1 |
| 25 | Finland .....                | .0.1 |
| 25 | Georgia.....                 | .0.1 |
| 25 | Germany.....                 | .0.1 |
| 25 | Hungary .....                | .0.1 |
| 25 | Indonesia.....               | .0.1 |
| 25 | Ireland.....                 | .0.1 |
| 25 | Israel.....                  | .0.1 |
| 25 | Kyrgyz Republic.....         | .0.1 |
| 25 | Lithuania.....               | .0.1 |
| 25 | Morocco.....                 | .0.1 |
| 25 | New Zealand .....            | .0.1 |
| 25 | Norway .....                 | .0.1 |
| 25 | Pakistan .....               | .0.1 |
| 25 | Poland.....                  | .0.1 |
| 25 | Sweden .....                 | .0.1 |
| 47 | United Arab Emirates .....   | .0.2 |
| 48 | Bahrain .....                | .0.2 |
| 48 | Belgium.....                 | .0.2 |
| 48 | Denmark.....                 | .0.2 |
| 48 | Greece.....                  | .0.2 |
| 48 | Iceland .....                | .0.2 |
| 48 | Kazakhstan .....             | .0.2 |
| 48 | Luxembourg .....             | .0.2 |
| 48 | Malta .....                  | .0.2 |
| 48 | Moldova.....                 | .0.2 |
| 48 | Netherlands.....             | .0.2 |
| 48 | Nicaragua.....               | .0.2 |
| 48 | Serbia and Montenegro.....   | .0.2 |
| 48 | Singapore .....              | .0.2 |
| 48 | United Kingdom .....         | .0.2 |
| 62 | Austria .....                | .0.3 |

RANK COUNTRY/ECONOMY HARD DATA

|     |                          |       |
|-----|--------------------------|-------|
| 62  | Bangladesh.....          | .0.3  |
| 62  | Canada.....              | .0.3  |
| 62  | Chile .....              | .0.3  |
| 62  | Ecuador .....            | .0.3  |
| 62  | Mexico.....              | .0.3  |
| 62  | Uruguay .....            | .0.3  |
| 69  | France.....              | .0.4  |
| 69  | Malaysia .....           | .0.4  |
| 69  | Portugal .....           | .0.4  |
| 69  | Switzerland.....         | .0.4  |
| 69  | Vietnam .....            | .0.4  |
| 74  | Italy .....              | .0.5  |
| 74  | Nepal .....              | .0.5  |
| 74  | Paraguay.....            | .0.5  |
| 74  | Peru.....                | .0.5  |
| 78  | Costa Rica .....         | .0.6  |
| 78  | Latvia .....             | .0.6  |
| 78  | Mauritania.....          | .0.6  |
| 78  | United States .....      | .0.6  |
| 82  | Argentina.....           | .0.7  |
| 82  | Brazil .....             | .0.7  |
| 82  | Colombia .....           | .0.7  |
| 82  | El Salvador.....         | .0.7  |
| 82  | Spain.....               | .0.7  |
| 82  | Venezuela .....          | .0.7  |
| 88  | India.....               | .0.9  |
| 88  | Panama.....              | .0.9  |
| 90  | Estonia.....             | .1.1  |
| 90  | Guatemala .....          | .1.1  |
| 90  | Russian Federation.....  | .1.1  |
| 93  | Gambia .....             | .1.2  |
| 93  | Jamaica .....            | .1.2  |
| 95  | Ukraine .....            | .1.4  |
| 96  | Barbados .....           | .1.5  |
| 96  | Thailand .....           | .1.5  |
| 98  | Dominican Republic ..... | .1.7  |
| 98  | Madagascar .....         | .1.7  |
| 98  | Suriname .....           | .1.7  |
| 101 | Honduras.....            | .1.8  |
| 102 | Benin .....              | .1.9  |
| 102 | Mali.....                | .1.9  |
| 104 | Guyana .....             | .2.5  |
| 105 | Cambodia .....           | .2.6  |
| 106 | Trinidad and Tobago..... | .3.2  |
| 107 | Angola .....             | .3.9  |
| 108 | Uganda .....             | .4.1  |
| 109 | Burkina Faso.....        | .4.2  |
| 110 | Ethiopia.....            | .4.4  |
| 111 | Chad .....               | .4.8  |
| 112 | Nigeria .....            | .5.4  |
| 113 | Burundi.....             | .6.0  |
| 114 | Kenya.....               | .6.7  |
| 115 | Cameroon.....            | .6.9  |
| 116 | Tanzania.....            | .8.8  |
| 117 | Mozambique.....          | .12.2 |
| 118 | Malawi.....              | .14.2 |
| 119 | Zambia.....              | .16.5 |
| 120 | Namibia .....            | .21.3 |
| 121 | South Africa.....        | .21.5 |
| 122 | Zimbabwe.....            | .24.6 |
| 123 | Lesotho .....            | .28.9 |
| 124 | Botswana .....           | .37.3 |

SOURCE: World Health Organization, *World Health Statistics 2006*, *World Health Report 2006*; national sources

## 11.09 Malaria incidence

Malaria cases per 100,000 inhabitants, 2004 or most recent year available

| RANK | COUNTRY/ECONOMY             | HARD DATA | RANK | COUNTRY/ECONOMY          | HARD DATA |
|------|-----------------------------|-----------|------|--------------------------|-----------|
| 1    | Albania.....                | 0.0       | 63   | Algeria .....            | 1.0       |
| 1    | Australia.....              | 0.0       | 64   | Trinidad and Tobago..... | 1.2       |
| 1    | Austria .....               | 0.0       | 65   | El Salvador.....         | 1.3       |
| 1    | Bahrain .....               | 0.0       | 66   | Uruguay .....            | 1.6       |
| 1    | Barbados .....              | 0.0       | 67   | Mauritius .....          | 1.8       |
| 1    | Belgium .....               | 0.0       | 68   | Kyrgyz Republic.....     | 1.9       |
| 1    | Bosnia and Herzegovina..... | 0.0       | 69   | Korea, Rep.....          | 2.3       |
| 1    | Bulgaria.....               | 0.0       | 70   | China .....              | 3.1       |
| 1    | Canada.....                 | 0.0       | 71   | Mexico.....              | 3.2       |
| 1    | Croatia .....               | 0.0       | 72   | Jamaica .....            | 5.2       |
| 1    | Cyprus .....                | 0.0       | 73   | Azerbaijan .....         | 5.7       |
| 1    | Czech Republic.....         | 0.0       | 74   | Georgia .....            | 6.2       |
| 1    | Denmark.....                | 0.0       | 75   | Paraguay.....            | 11.6      |
| 1    | Egypt .....                 | 0.0       | 76   | Turkey.....              | 12.9      |
| 1    | Estonia.....                | 0.0       | 77   | Malaysia .....           | 22.4      |
| 1    | Finland.....                | 0.0       | 78   | Dominican Republic ..... | 26.5      |
| 1    | France.....                 | 0.0       | 79   | South Africa.....        | 29.9      |
| 1    | Germany.....                | 0.0       | 80   | Costa Rica .....         | 30.0      |
| 1    | Greece.....                 | 0.0       | 81   | Nepal .....              | 37.3      |
| 1    | Hong Kong SAR .....         | 0.0       | 82   | Bangladesh.....          | 38.8      |
| 1    | Hungary .....               | 0.0       | 83   | Vietnam .....            | 46.0      |
| 1    | Iceland .....               | 0.0       | 84   | Philippines .....        | 54.6      |
| 1    | Ireland.....                | 0.0       | 85   | Sri Lanka.....           | 55.0      |
| 1    | Israel.....                 | 0.0       | 86   | Thailand .....           | 59.5      |
| 1    | Italy.....                  | 0.0       | 87   | Pakistan .....           | 81.5      |
| 1    | Japan .....                 | 0.0       | 88   | Tajikistan .....         | 87.5      |
| 1    | Jordan.....                 | 0.0       | 89   | Indonesia.....           | 98.9      |
| 1    | Kuwait .....                | 0.0       | 90   | Nicaragua.....           | 122.5     |
| 1    | Latvia .....                | 0.0       | 91   | Honduras.....            | 146.7     |
| 1    | Lesotho .....               | 0.0       | 92   | Panama.....              | 159.2     |
| 1    | Lithuania.....              | 0.0       | 93   | Bolivia .....            | 165.7     |
| 1    | Luxembourg .....            | 0.0       | 94   | India.....               | 167.2     |
| 1    | Macedonia, FYR .....        | 0.0       | 95   | Venezuela .....          | 178.1     |
| 1    | Malta .....                 | 0.0       | 96   | Ecuador .....            | 224.2     |
| 1    | Mongolia.....               | 0.0       | 97   | Guatemala .....          | 253.1     |
| 1    | Netherlands.....            | 0.0       | 98   | Brazil.....              | 254.2     |
| 1    | New Zealand .....           | 0.0       | 99   | Colombia .....           | 260.3     |
| 1    | Norway.....                 | 0.0       | 100  | Peru.....                | 292.2     |
| 1    | Poland.....                 | 0.0       | 101  | Kenya.....               | 389.3     |
| 1    | Portugal .....              | 0.0       | 102  | Cambodia .....           | 505.4     |
| 1    | Qatar.....                  | 0.0       | 103  | Ethiopia.....            | 799.5     |
| 1    | Romania .....               | 0.0       | 104  | Botswana .....           | 1,245.4   |
| 1    | Russian Federation.....     | 0.0       | 105  | Suriname .....           | 1,906.6   |
| 1    | Serbia and Montenegro.....  | 0.0       | 106  | Nigeria .....            | 2,103.6   |
| 1    | Singapore .....             | 0.0       | 107  | Cameroon.....            | 2,900.0   |
| 1    | Slovak Republic .....       | 0.0       | 108  | Tanzania.....            | 3,000.0   |
| 1    | Slovenia .....              | 0.0       | 109  | Guyana .....             | 3,773.3   |
| 1    | Spain.....                  | 0.0       | 110  | Chad .....               | 4,767.9   |
| 1    | Sweden.....                 | 0.0       | 111  | Mauritania.....          | 5,979.4   |
| 1    | Switzerland.....            | 0.0       | 112  | Mali.....                | 6,226.4   |
| 1    | Tunisia .....               | 0.0       | 113  | Zimbabwe.....            | 9,562.4   |
| 1    | Ukraine .....               | 0.0       | 114  | Angola .....             | 10,139.1  |
| 1    | United Arab Emirates.....   | 0.0       | 115  | Burkina Faso.....        | 11,894.5  |
| 1    | United Kingdom .....        | 0.0       | 116  | Madagascar .....         | 12,151.7  |
| 1    | United States .....         | 0.0       | 117  | Benin .....              | 12,172.5  |
| 56   | Chile .....                 | 0.0       | 118  | Gambia .....             | 17,340.0  |
| 57   | Taiwan, China .....         | 0.1       | 119  | Zambia.....              | 18,964.0  |
| 58   | Kazakhstan .....            | 0.1       | 120  | Namibia .....            | 22,204.1  |
| 59   | Moldova.....                | 0.1       | 121  | Malawi.....              | 24,180.7  |
| 60   | Morocco .....               | 0.2       | 122  | Mozambique.....          | 26,919.9  |
| 61   | Argentina.....              | 0.3       | 123  | Burundi.....             | 26,993.9  |
| 62   | Armenia.....                | 0.9       | 124  | Uganda .....             | 47,842.7  |

SOURCE: World Health Organization (WHO) and UNICEF, *World Malaria Report 2005*; WHO Regional Offices; UNFPA, *State of World Population 2005*; World Bank, *World Development Indicators 2006*; UNDP, *Human Development Report 2006*; national sources

## 11.10 Tuberculosis incidence

Tuberculosis cases per 100,000 inhabitants, 2004

| RANK | COUNTRY/ECONOMY              | HARD DATA | RANK | COUNTRY/ECONOMY          | HARD DATA |
|------|------------------------------|-----------|------|--------------------------|-----------|
| 1    | Iceland .....                | 2.1       | 63   | Qatar .....              | 76.6      |
| 2    | Sweden .....                 | 3.4       | 64   | Brazil .....             | 76.7      |
| 3    | United States .....          | 3.6       | 65   | Hong Kong SAR .....      | 77.0      |
| 4    | Norway .....                 | 4.1       | 66   | Nicaragua .....          | 80.2      |
| 5    | Canada .....                 | 4.2       | 67   | Georgia .....            | 89.3      |
| 6    | Cyprus .....                 | 4.3       | 68   | Azerbaijan .....         | 89.6      |
| 7    | Malta .....                  | 4.6       | 69   | Sri Lanka .....          | 90.9      |
| 8    | Jordan .....                 | 5.0       | 70   | Honduras .....           | 97.0      |
| 9    | Italy .....                  | 5.6       | 71   | Suriname .....           | 97.7      |
| 10   | Switzerland .....            | 5.7       | 72   | Armenia .....            | 98.2      |
| 11   | Australia .....              | 5.8       | 73   | Morocco .....            | 105.2     |
| 12   | Denmark .....                | 6.2       | 74   | Paraguay .....           | 106.8     |
| 13   | Netherlands .....            | 6.3       | 75   | Guatemala .....          | 107.3     |
| 14   | Germany .....                | 6.3       | 76   | Dominican Republic ..... | 117.6     |
| 15   | Finland .....                | 7.0       | 77   | Korea, Rep. ....         | 124.6     |
| 16   | Israel .....                 | 7.0       | 78   | Malaysia .....           | 132.7     |
| 17   | Jamaica .....                | 9.2       | 79   | Mauritius .....          | 135.4     |
| 18   | United Kingdom .....         | 9.2       | 80   | Kyrgyz Republic .....    | 136.6     |
| 19   | Ireland .....                | 9.3       | 81   | Benin .....              | 142.3     |
| 20   | Luxembourg .....             | 9.4       | 82   | Ukraine .....            | 150.8     |
| 21   | France .....                 | 9.8       | 83   | Kazakhstan .....         | 160.3     |
| 22   | Belgium .....                | 10.5      | 84   | Russian Federation ..... | 160.3     |
| 23   | Austria .....                | 10.8      | 85   | Guyana .....             | 185.4     |
| 24   | New Zealand .....            | 10.8      | 86   | Romania .....            | 187.9     |
| 25   | Czech Republic .....         | 11.2      | 87   | Ecuador .....            | 196.3     |
| 26   | Barbados .....               | 12.3      | 88   | Thailand .....           | 207.7     |
| 27   | Trinidad and Tobago .....    | 12.4      | 89   | Mongolia .....           | 208.9     |
| 28   | Costa Rica .....             | 15.3      | 90   | Moldova .....            | 213.9     |
| 29   | Chile .....                  | 15.8      | 91   | Peru .....               | 216.0     |
| 30   | Slovenia .....               | 16.8      | 92   | China .....              | 221.1     |
| 31   | Greece .....                 | 17.0      | 93   | Cameroon .....           | 227.4     |
| 32   | Spain .....                  | 19.8      | 94   | Vietnam .....            | 231.8     |
| 33   | Slovak Republic .....        | 23.4      | 95   | Nepal .....              | 256.7     |
| 34   | Tunisia .....                | 24.0      | 96   | Indonesia .....          | 275.2     |
| 35   | United Arab Emirates .....   | 25.9      | 97   | Tajikistan .....         | 276.8     |
| 36   | Hungary .....                | 29.7      | 98   | Bolivia .....            | 289.8     |
| 37   | Kuwait .....                 | 29.8      | 99   | Angola .....             | 309.9     |
| 38   | Albania .....                | 30.7      | 100  | India .....              | 312.2     |
| 39   | Poland .....                 | 31.9      | 101  | Pakistan .....           | 328.7     |
| 40   | Uruguay .....                | 32.8      | 102  | Gambia .....             | 328.7     |
| 41   | Macedonia, FYR .....         | 33.6      | 103  | Madagascar .....         | 351.2     |
| 42   | Portugal .....               | 34.8      | 104  | Burkina Faso .....       | 365.1     |
| 43   | Egypt .....                  | 34.9      | 105  | Bangladesh .....         | 435.4     |
| 44   | Bulgaria .....               | 36.1      | 106  | Philippines .....        | 463.3     |
| 45   | Japan .....                  | 39.4      | 107  | Tanzania .....           | 478.6     |
| 46   | Singapore .....              | 40.8      | 108  | Malawi .....             | 500.9     |
| 47   | Mexico .....                 | 43.2      | 109  | Mauritania .....         | 502.4     |
| 48   | Panama .....                 | 44.7      | 110  | Nigeria .....            | 531.3     |
| 49   | Turkey .....                 | 44.8      | 111  | Ethiopia .....           | 533.2     |
| 50   | Estonia .....                | 49.2      | 112  | Lesotho .....            | 544.0     |
| 51   | Bahrain .....                | 49.8      | 113  | Botswana .....           | 552.8     |
| 52   | Serbia and Montenegro .....  | 49.8      | 114  | Burundi .....            | 563.7     |
| 53   | Venezuela .....              | 52.3      | 115  | Chad .....               | 565.7     |
| 54   | Argentina .....              | 53.0      | 116  | Mali .....               | 577.9     |
| 55   | Bosnia and Herzegovina ..... | 53.4      | 117  | Namibia .....            | 585.7     |
| 56   | Algeria .....                | 53.9      | 118  | Mozambique .....         | 635.1     |
| 57   | Croatia .....                | 65.0      | 119  | Uganda .....             | 646.4     |
| 58   | Lithuania .....              | 66.5      | 120  | South Africa .....       | 669.9     |
| 59   | Latvia .....                 | 71.5      | 121  | Zimbabwe .....           | 672.6     |
| 60   | Taiwan, China .....          | 74.1      | 122  | Zambia .....             | 707.3     |
| 61   | El Salvador .....            | 74.5      | 123  | Cambodia .....           | 708.7     |
| 62   | Colombia .....               | 74.7      | 124  | Kenya .....              | 888.4     |

SOURCE: World Health Organization, *World Health Statistics 2006*, *World Health Report 2006*, *Global Report 2006*; national sources

## 11.11 Life expectancy

Life expectancy at birth (years), 2004

RANK COUNTRY/ECONOMY HARD DATA

|    |                        |      |
|----|------------------------|------|
| 1  | Hong Kong SAR          | 82.0 |
| 1  | Japan                  | 82.0 |
| 3  | Australia              | 81.0 |
| 3  | Iceland                | 81.0 |
| 3  | Italy                  | 81.0 |
| 3  | Sweden                 | 81.0 |
| 3  | Switzerland            | 81.0 |
| 8  | Canada                 | 80.0 |
| 8  | France                 | 80.0 |
| 8  | Israel                 | 80.0 |
| 8  | New Zealand            | 80.0 |
| 8  | Norway                 | 80.0 |
| 8  | Singapore              | 80.0 |
| 8  | Spain                  | 80.0 |
| 15 | Austria                | 79.0 |
| 15 | Cyprus                 | 79.0 |
| 15 | Finland                | 79.0 |
| 15 | Germany                | 79.0 |
| 15 | Greece                 | 79.0 |
| 15 | Luxembourg             | 79.0 |
| 15 | Malta                  | 79.0 |
| 15 | Netherlands            | 79.0 |
| 15 | United Kingdom         | 79.0 |
| 24 | Belgium                | 78.0 |
| 24 | Denmark                | 78.0 |
| 24 | Ireland                | 78.0 |
| 24 | Portugal               | 78.0 |
| 24 | United States          | 78.0 |
| 29 | Chile                  | 77.0 |
| 29 | Costa Rica             | 77.0 |
| 29 | Korea, Rep.            | 77.0 |
| 29 | Kuwait                 | 77.0 |
| 29 | Slovenia               | 77.0 |
| 29 | United Arab Emirates   | 77.0 |
| 35 | Taiwan, China          | 76.4 |
| 36 | Czech Republic         | 76.0 |
| 36 | Panama                 | 76.0 |
| 36 | Qatar                  | 76.0 |
| 39 | Argentina              | 75.0 |
| 39 | Barbados               | 75.0 |
| 39 | Croatia                | 75.0 |
| 39 | Poland                 | 75.0 |
| 39 | Uruguay                | 75.0 |
| 39 | Venezuela              | 75.0 |
| 45 | Bahrain                | 74.0 |
| 45 | Georgia                | 74.0 |
| 45 | Mexico                 | 74.0 |
| 45 | Slovak Republic        | 74.0 |
| 49 | Bosnia and Herzegovina | 73.0 |
| 49 | Colombia               | 73.0 |
| 49 | Hungary                | 73.0 |
| 49 | Serbia and Montenegro  | 73.0 |
| 53 | Albania                | 72.0 |
| 53 | Bulgaria               | 72.0 |
| 53 | China                  | 72.0 |
| 53 | Ecuador                | 72.0 |
| 53 | Estonia                | 72.0 |
| 53 | Jamaica                | 72.0 |
| 53 | Lithuania              | 72.0 |
| 53 | Macedonia, FYR         | 72.0 |
| 53 | Malaysia               | 72.0 |
| 53 | Mauritius              | 72.0 |

RANK COUNTRY/ECONOMY HARD DATA

|     |                     |      |
|-----|---------------------|------|
| 53  | Paraguay            | 72.0 |
| 53  | Romania             | 72.0 |
| 53  | Tunisia             | 72.0 |
| 66  | Algeria             | 71.0 |
| 66  | El Salvador         | 71.0 |
| 66  | Jordan              | 71.0 |
| 66  | Latvia              | 71.0 |
| 66  | Morocco             | 71.0 |
| 66  | Peru                | 71.0 |
| 66  | Sri Lanka           | 71.0 |
| 66  | Turkey              | 71.0 |
| 66  | Vietnam             | 71.0 |
| 75  | Brazil              | 70.0 |
| 75  | Thailand            | 70.0 |
| 75  | Trinidad and Tobago | 70.0 |
| 78  | Nicaragua           | 69.0 |
| 79  | Armenia             | 68.0 |
| 79  | Egypt               | 68.0 |
| 79  | Guatemala           | 68.0 |
| 79  | Philippines         | 68.0 |
| 83  | Dominican Republic  | 67.0 |
| 83  | Honduras            | 67.0 |
| 83  | Indonesia           | 67.0 |
| 83  | Moldova             | 67.0 |
| 83  | Suriname            | 67.0 |
| 83  | Ukraine             | 67.0 |
| 89  | Azerbaijan          | 65.0 |
| 89  | Bolivia             | 65.0 |
| 89  | Mongolia            | 65.0 |
| 89  | Russian Federation  | 65.0 |
| 93  | Guyana              | 63.0 |
| 93  | Kyrgyz Republic     | 63.0 |
| 93  | Tajikistan          | 63.0 |
| 96  | Bangladesh          | 62.0 |
| 96  | India               | 62.0 |
| 96  | Pakistan            | 62.0 |
| 99  | Kazakhstan          | 61.0 |
| 99  | Nepal               | 61.0 |
| 101 | Mauritania          | 58.0 |
| 102 | Gambia              | 57.0 |
| 102 | Madagascar          | 57.0 |
| 104 | Cambodia            | 54.0 |
| 104 | Namibia             | 54.0 |
| 106 | Benin               | 53.0 |
| 107 | Kenya               | 51.0 |
| 108 | Cameroon            | 50.0 |
| 108 | Ethiopia            | 50.0 |
| 110 | Uganda              | 49.0 |
| 111 | Burkina Faso        | 48.0 |
| 111 | South Africa        | 48.0 |
| 111 | Tanzania            | 48.0 |
| 114 | Chad                | 46.0 |
| 114 | Mali                | 46.0 |
| 114 | Nigeria             | 46.0 |
| 117 | Burundi             | 45.0 |
| 117 | Mozambique          | 45.0 |
| 119 | Lesotho             | 41.0 |
| 119 | Malawi              | 41.0 |
| 121 | Angola              | 40.0 |
| 121 | Botswana            | 40.0 |
| 121 | Zambia              | 40.0 |
| 124 | Zimbabwe            | 36.0 |

SOURCE: World Health Organization, *World Health Report 2006*; World Bank, *World Development Indicators 2006*; national sources

## Pillar 12

# National tourism perception

## 12.01 Tourism openness

Tourism expenditures and receipts as a percentage of GDP, 2004

RANK COUNTRY/ECONOMY HARD DATA

|    |                          |      |  |
|----|--------------------------|------|--|
| 1  | Barbados .....           | 31.5 |  |
| 2  | Cyprus .....             | 24.5 |  |
| 3  | Croatia .....            | 23.8 |  |
| 4  | Albania .....            | 22.9 |  |
| 5  | Mongolia .....           | 22.0 |  |
| 6  | Luxembourg .....         | 19.8 |  |
| 7  | Georgia .....            | 19.3 |  |
| 8  | Mauritius .....          | 18.6 |  |
| 9  | Jamaica .....            | 18.4 |  |
| 10 | Malta .....              | 17.2 |  |
| 11 | Bahrain .....            | 15.6 |  |
| 12 | Dominican Republic ..... | 15.2 |  |
| 13 | Bulgaria .....           | 14.2 |  |
| 14 | Mozambique .....         | 13.9 |  |
| 15 | Hong Kong SAR .....      | 13.9 |  |
| 16 | Ukraine .....            | 12.5 |  |
| 17 | Cambodia .....           | 12.4 |  |
| 18 | Greece .....             | 12.3 |  |
| 19 | Jordan .....             | 12.0 |  |
| 20 | Malaysia .....           | 11.9 |  |
| 21 | Estonia .....            | 11.8 |  |
| 22 | Malawi .....             | 11.5 |  |
| 23 | Singapore .....          | 11.0 |  |
| 24 | Tanzania .....           | 10.5 |  |
| 25 | Austria .....            | 10.3 |  |
| 26 | Thailand .....           | 9.6  |  |
| 27 | Moldova .....            | 9.5  |  |
| 28 | Morocco .....            | 8.9  |  |
| 29 | Honduras .....           | 8.8  |  |
| 30 | Costa Rica .....         | 8.7  |  |
| 31 | Denmark .....            | 8.6  |  |
| 32 | Belgium .....            | 8.6  |  |
| 33 | New Zealand .....        | 8.3  |  |
| 34 | Tunisia .....            | 8.3  |  |
| 35 | Argentina .....          | 7.9  |  |
| 36 | Kuwait .....             | 7.8  |  |
| 37 | Iceland .....            | 7.6  |  |
| 38 | Slovenia .....           | 7.5  |  |
| 39 | Hungary .....            | 7.3  |  |
| 40 | Turkey .....             | 7.2  |  |
| 41 | Panama .....             | 7.2  |  |
| 42 | Portugal .....           | 6.9  |  |
| 43 | Spain .....              | 6.6  |  |
| 44 | Guyana .....             | 6.5  |  |
| 45 | Madagascar .....         | 6.1  |  |
| 46 | Egypt .....              | 5.8  |  |
| 47 | Armenia .....            | 5.7  |  |
| 48 | Ireland .....            | 5.5  |  |
| 49 | Kazakhstan .....         | 5.4  |  |
| 50 | Czech Republic .....     | 5.3  |  |
| 51 | Sweden .....             | 5.2  |  |
| 52 | Switzerland .....        | 5.1  |  |
| 53 | Netherlands .....        | 5.1  |  |
| 54 | Slovak Republic .....    | 5.0  |  |
| 55 | South Africa .....       | 4.7  |  |
| 56 | Lesotho .....            | 4.7  |  |
| 57 | Indonesia .....          | 4.7  |  |
| 58 | Guatemala .....          | 4.3  |  |
| 59 | Suriname .....           | 4.3  |  |
| 60 | Ecuador .....            | 4.3  |  |
| 61 | El Salvador .....        | 4.2  |  |
| 62 | Uruguay .....            | 4.2  |  |

RANK COUNTRY/ECONOMY HARD DATA

|     |                              |     |  |
|-----|------------------------------|-----|--|
| 63  | Russian Federation .....     | 4.0 |  |
| 64  | Germany .....                | 4.0 |  |
| 65  | Kyrgyz Republic .....        | 4.0 |  |
| 66  | Norway .....                 | 3.9 |  |
| 67  | France .....                 | 3.9 |  |
| 68  | Trinidad and Tobago .....    | 3.8 |  |
| 69  | United Kingdom .....         | 3.7 |  |
| 70  | Australia .....              | 3.6 |  |
| 71  | Nicaragua .....              | 3.6 |  |
| 72  | Italy .....                  | 3.6 |  |
| 73  | Lithuania .....              | 3.2 |  |
| 74  | Latvia .....                 | 3.2 |  |
| 75  | Colombia .....               | 3.2 |  |
| 76  | Sri Lanka .....              | 3.1 |  |
| 77  | Kenya .....                  | 3.1 |  |
| 78  | China .....                  | 3.0 |  |
| 79  | Israel .....                 | 3.0 |  |
| 80  | Burundi .....                | 2.8 |  |
| 81  | Korea, Rep. ....             | 2.8 |  |
| 82  | Bolivia .....                | 2.8 |  |
| 83  | Canada .....                 | 2.7 |  |
| 84  | Peru .....                   | 2.7 |  |
| 85  | Romania .....                | 2.6 |  |
| 86  | Finland .....                | 2.6 |  |
| 87  | Ethiopia .....               | 2.6 |  |
| 88  | Benin .....                  | 2.6 |  |
| 89  | Poland .....                 | 2.6 |  |
| 90  | Bosnia and Herzegovina ..... | 2.5 |  |
| 91  | Mexico .....                 | 2.2 |  |
| 92  | Chile .....                  | 2.1 |  |
| 93  | Philippines .....            | 2.0 |  |
| 94  | Azerbaijan .....             | 1.9 |  |
| 95  | Nigeria .....                | 1.8 |  |
| 96  | Brazil .....                 | 1.4 |  |
| 97  | India .....                  | 1.3 |  |
| 98  | Paraguay .....               | 1.2 |  |
| 99  | United States .....          | 1.2 |  |
| 100 | Venezuela .....              | 1.1 |  |
| 101 | Angola .....                 | 1.0 |  |
| 102 | Algeria .....                | 0.7 |  |
| 103 | Japan .....                  | 0.7 |  |
| 104 | Bangladesh .....             | 0.6 |  |
| 105 | Pakistan .....               | 0.4 |  |
| 106 | Tajikistan .....             | 0.4 |  |
| n/a | Botswana .....               | n/a |  |
| n/a | Burkina Faso .....           | n/a |  |
| n/a | Cameroon .....               | n/a |  |
| n/a | Chad .....                   | n/a |  |
| n/a | Gambia .....                 | n/a |  |
| n/a | Macedonia, FYR .....         | n/a |  |
| n/a | Mali .....                   | n/a |  |
| n/a | Mauritania .....             | n/a |  |
| n/a | Namibia .....                | n/a |  |
| n/a | Nepal .....                  | n/a |  |
| n/a | Qatar .....                  | n/a |  |
| n/a | Serbia and Montenegro .....  | n/a |  |
| n/a | Taiwan, China .....          | n/a |  |
| n/a | Uganda .....                 | n/a |  |
| n/a | United Arab Emirates .....   | n/a |  |
| n/a | Vietnam .....                | n/a |  |
| n/a | Zambia .....                 | n/a |  |
| n/a | Zimbabwe .....               | n/a |  |



## 12.02 Attitude toward tourists

Are foreign travelers and in particular tourists welcome in your country? (1 = no, citizens in my country do not welcome foreign travelers and tourists, 7 = yes, my country's citizens are open and welcome foreign travelers and tourists)

| RANK | COUNTRY/ECONOMY        | SCORE | 1 | MEAN: 6.3 | 7 | SD  | RANK | COUNTRY/ECONOMY     | SCORE | 1 | MEAN: 6.3 | 7 | SD  |
|------|------------------------|-------|---|-----------|---|-----|------|---------------------|-------|---|-----------|---|-----|
| 1    | Burkina Faso           | 6.9   |   |           |   | 0.4 | 63   | Finland             | 6.4   |   |           |   | 0.8 |
| 2    | New Zealand            | 6.8   |   |           |   | 0.4 | 64   | Tajikistan          | 6.4   |   |           |   | 1.2 |
| 3    | Zambia                 | 6.8   |   |           |   | 0.4 | 65   | Tanzania            | 6.4   |   |           |   | 0.9 |
| 4    | Uganda                 | 6.8   |   |           |   | 0.4 | 66   | Vietnam             | 6.4   |   |           |   | 0.8 |
| 5    | United Arab Emirates   | 6.8   |   |           |   | 0.4 | 67   | Jordan              | 6.4   |   |           |   | 1.0 |
| 6    | Thailand               | 6.8   |   |           |   | 0.4 | 68   | Albania             | 6.4   |   |           |   | 1.0 |
| 7    | Canada                 | 6.8   |   |           |   | 0.5 | 69   | Moldova             | 6.4   |   |           |   | 1.1 |
| 8    | Dominican Republic     | 6.8   |   |           |   | 0.4 | 70   | Italy               | 6.3   |   |           |   | 0.9 |
| 9    | Iceland                | 6.8   |   |           |   | 0.5 | 71   | Kazakhstan          | 6.3   |   |           |   | 0.9 |
| 10   | Malta                  | 6.8   |   |           |   | 0.5 | 72   | Colombia            | 6.3   |   |           |   | 0.9 |
| 11   | Austria                | 6.8   |   |           |   | 0.5 | 73   | Israel              | 6.3   |   |           |   | 0.8 |
| 12   | Singapore              | 6.7   |   |           |   | 0.5 | 74   | Chile               | 6.3   |   |           |   | 0.8 |
| 13   | Mauritania             | 6.7   |   |           |   | 0.7 | 75   | Tunisia             | 6.3   |   |           |   | 1.0 |
| 14   | Gambia                 | 6.7   |   |           |   | 0.6 | 76   | Romania             | 6.3   |   |           |   | 1.0 |
| 15   | Norway                 | 6.7   |   |           |   | 0.5 | 77   | Burundi             | 6.3   |   |           |   | 1.4 |
| 16   | Cyprus                 | 6.7   |   |           |   | 0.6 | 78   | Paraguay            | 6.3   |   |           |   | 1.0 |
| 17   | Ireland                | 6.7   |   |           |   | 0.6 | 79   | El Salvador         | 6.3   |   |           |   | 1.0 |
| 18   | Kenya                  | 6.7   |   |           |   | 0.9 | 80   | Namibia             | 6.2   |   |           |   | 1.0 |
| 19   | Philippines            | 6.7   |   |           |   | 0.6 | 81   | Slovenia            | 6.2   |   |           |   | 1.0 |
| 20   | Australia              | 6.7   |   |           |   | 0.6 | 82   | Japan               | 6.2   |   |           |   | 0.9 |
| 21   | Macedonia, FYR         | 6.7   |   |           |   | 0.7 | 83   | Bangladesh          | 6.2   |   |           |   | 1.4 |
| 22   | Jamaica                | 6.7   |   |           |   | 0.6 | 84   | Suriname            | 6.2   |   |           |   | 1.2 |
| 23   | Greece                 | 6.7   |   |           |   | 0.8 | 85   | Nigeria             | 6.2   |   |           |   | 1.3 |
| 24   | Mali                   | 6.7   |   |           |   | 0.6 | 86   | Madagascar          | 6.2   |   |           |   | 1.1 |
| 25   | Armenia                | 6.7   |   |           |   | 0.5 | 87   | Kyrgyz Republic     | 6.2   |   |           |   | 1.2 |
| 26   | Barbados               | 6.7   |   |           |   | 1.0 | 88   | Mozambique          | 6.1   |   |           |   | 1.3 |
| 27   | Mexico                 | 6.7   |   |           |   | 0.6 | 89   | Bahrain             | 6.1   |   |           |   | 1.2 |
| 28   | Hong Kong SAR          | 6.6   |   |           |   | 0.6 | 90   | Peru                | 6.1   |   |           |   | 1.0 |
| 29   | Serbia and Montenegro  | 6.6   |   |           |   | 0.9 | 91   | Cameroon            | 6.1   |   |           |   | 1.2 |
| 30   | Croatia                | 6.6   |   |           |   | 0.8 | 92   | Ecuador             | 6.1   |   |           |   | 1.2 |
| 31   | Mauritius              | 6.6   |   |           |   | 1.0 | 93   | Bulgaria            | 6.1   |   |           |   | 1.2 |
| 32   | Cambodia               | 6.6   |   |           |   | 0.6 | 94   | Qatar               | 6.1   |   |           |   | 1.2 |
| 33   | Azerbaijan             | 6.6   |   |           |   | 0.8 | 95   | Argentina           | 6.1   |   |           |   | 0.8 |
| 33   | Uruguay                | 6.6   |   |           |   | 0.6 | 96   | Botswana            | 6.0   |   |           |   | 1.4 |
| 35   | Morocco                | 6.6   |   |           |   | 0.8 | 96   | Guatemala           | 6.0   |   |           |   | 1.0 |
| 36   | Malaysia               | 6.6   |   |           |   | 0.8 | 98   | Panama              | 6.0   |   |           |   | 1.2 |
| 37   | Belgium                | 6.6   |   |           |   | 0.6 | 99   | Trinidad and Tobago | 6.0   |   |           |   | 1.1 |
| 38   | South Africa           | 6.6   |   |           |   | 0.6 | 100  | Hungary             | 6.0   |   |           |   | 1.1 |
| 38   | Spain                  | 6.6   |   |           |   | 0.5 | 101  | United States       | 6.0   |   |           |   | 1.4 |
| 40   | Brazil                 | 6.6   |   |           |   | 0.7 | 102  | Honduras            | 6.0   |   |           |   | 1.1 |
| 41   | Ethiopia               | 6.6   |   |           |   | 0.7 | 103  | Mongolia            | 6.0   |   |           |   | 1.5 |
| 42   | India                  | 6.6   |   |           |   | 0.8 | 104  | Slovak Republic     | 6.0   |   |           |   | 0.8 |
| 43   | Sri Lanka              | 6.6   |   |           |   | 1.0 | 105  | Lithuania           | 6.0   |   |           |   | 1.1 |
| 44   | Costa Rica             | 6.6   |   |           |   | 0.7 | 106  | Egypt               | 5.9   |   |           |   | 1.6 |
| 45   | Estonia                | 6.5   |   |           |   | 0.9 | 107  | Algeria             | 5.9   |   |           |   | 1.4 |
| 46   | Georgia                | 6.5   |   |           |   | 0.6 | 108  | Czech Republic      | 5.9   |   |           |   | 0.7 |
| 47   | Guyana                 | 6.5   |   |           |   | 0.8 | 109  | Latvia              | 5.9   |   |           |   | 1.1 |
| 48   | Nicaragua              | 6.5   |   |           |   | 0.8 | 110  | Zimbabwe            | 5.9   |   |           |   | 1.3 |
| 49   | Nepal                  | 6.5   |   |           |   | 1.0 | 111  | Korea, Rep.         | 5.9   |   |           |   | 1.1 |
| 50   | Benin                  | 6.5   |   |           |   | 1.0 | 112  | China               | 5.8   |   |           |   | 1.1 |
| 51   | Malawi                 | 6.5   |   |           |   | 0.8 | 113  | Lesotho             | 5.8   |   |           |   | 1.6 |
| 52   | Denmark                | 6.5   |   |           |   | 0.7 | 114  | Ukraine             | 5.8   |   |           |   | 1.4 |
| 53   | Netherlands            | 6.5   |   |           |   | 1.0 | 115  | Luxembourg          | 5.7   |   |           |   | 1.1 |
| 54   | Indonesia              | 6.5   |   |           |   | 0.6 | 116  | Chad                | 5.7   |   |           |   | 1.7 |
| 55   | Portugal               | 6.5   |   |           |   | 1.1 | 117  | Bolivia             | 5.6   |   |           |   | 1.3 |
| 56   | Taiwan, China          | 6.5   |   |           |   | 0.7 | 118  | Angola              | 5.6   |   |           |   | 1.5 |
| 57   | Sweden                 | 6.5   |   |           |   | 0.9 | 119  | Russian Federation  | 5.4   |   |           |   | 1.4 |
| 58   | Turkey                 | 6.5   |   |           |   | 0.9 | 120  | Pakistan            | 5.3   |   |           |   | 1.6 |
| 59   | Switzerland            | 6.5   |   |           |   | 1.1 | 121  | Kuwait              | 5.3   |   |           |   | 1.6 |
| 60   | Bosnia and Herzegovina | 6.5   |   |           |   | 1.0 | 122  | France              | 5.2   |   |           |   | 1.5 |
| 61   | Germany                | 6.5   |   |           |   | 0.8 | 123  | Venezuela           | 5.1   |   |           |   | 1.5 |
| 62   | United Kingdom         | 6.4   |   |           |   | 0.8 | 124  | Poland              | 4.9   |   |           |   | 1.4 |

SOURCE: World Economic Forum, Executive Opinion Survey 2006

## 12.03 Recommendation to extend business trips

When a senior executive visits you in your country for business purposes, how likely are you to recommend extending their trip for leisure purposes? (1 = I would never recommend it, 7 = I would always recommend it)

| RANK | COUNTRY/ECONOMY            | SCORE | 1 | MEAN: 5.4 | 7 | SD  | RANK | COUNTRY/ECONOMY              | SCORE | 1 | MEAN: 5.4 | 7 | SD  |
|------|----------------------------|-------|---|-----------|---|-----|------|------------------------------|-------|---|-----------|---|-----|
| 1    | Turkey .....               | 6.5   |   |           |   | 1.1 | 63   | Colombia .....               | 5.5   |   |           |   | 1.4 |
| 2    | South Africa .....         | 6.4   |   |           |   | 0.8 | 64   | Ecuador .....                | 5.5   |   |           |   | 1.8 |
| 3    | Mauritania .....           | 6.4   |   |           |   | 1.2 | 65   | Taiwan, China .....          | 5.5   |   |           |   | 1.6 |
| 4    | Azerbaijan .....           | 6.4   |   |           |   | 1.0 | 66   | Burkina Faso .....           | 5.4   |   |           |   | 1.7 |
| 5    | Indonesia .....            | 6.3   |   |           |   | 0.9 | 67   | Hong Kong SAR .....          | 5.4   |   |           |   | 1.6 |
| 6    | Kazakhstan .....           | 6.3   |   |           |   | 1.1 | 68   | Luxembourg .....             | 5.4   |   |           |   | 1.4 |
| 7    | United Arab Emirates ..... | 6.3   |   |           |   | 1.0 | 69   | Romania .....                | 5.4   |   |           |   | 1.7 |
| 8    | Argentina .....            | 6.2   |   |           |   | 1.0 | 70   | Mexico .....                 | 5.3   |   |           |   | 1.5 |
| 9    | Armenia .....              | 6.2   |   |           |   | 1.2 | 71   | Nicaragua .....              | 5.3   |   |           |   | 1.7 |
| 10   | Italy .....                | 6.1   |   |           |   | 1.4 | 72   | Burundi .....                | 5.3   |   |           |   | 1.7 |
| 11   | Greece .....               | 6.1   |   |           |   | 1.1 | 73   | Madagascar .....             | 5.3   |   |           |   | 1.4 |
| 12   | Tajikistan .....           | 6.1   |   |           |   | 1.5 | 74   | Nepal .....                  | 5.3   |   |           |   | 1.6 |
| 13   | France .....               | 6.1   |   |           |   | 1.3 | 75   | Zimbabwe .....               | 5.3   |   |           |   | 1.8 |
| 14   | Austria .....              | 6.1   |   |           |   | 1.2 | 76   | Malawi .....                 | 5.2   |   |           |   | 1.7 |
| 15   | Namibia .....              | 6.1   |   |           |   | 1.1 | 77   | Cameroon .....               | 5.2   |   |           |   | 1.6 |
| 16   | Malaysia .....             | 6.1   |   |           |   | 1.3 | 78   | Latvia .....                 | 5.2   |   |           |   | 1.7 |
| 17   | Costa Rica .....           | 6.0   |   |           |   | 1.4 | 79   | Egypt .....                  | 5.2   |   |           |   | 2.0 |
| 18   | Tunisia .....              | 6.0   |   |           |   | 1.3 | 80   | Australia .....              | 5.2   |   |           |   | 1.5 |
| 19   | Barbados .....             | 6.0   |   |           |   | 1.6 | 81   | Peru .....                   | 5.2   |   |           |   | 1.7 |
| 20   | Georgia .....              | 6.0   |   |           |   | 1.1 | 82   | Serbia and Montenegro .....  | 5.2   |   |           |   | 2.1 |
| 21   | India .....                | 6.0   |   |           |   | 1.3 | 83   | Germany .....                | 5.2   |   |           |   | 1.8 |
| 22   | Portugal .....             | 6.0   |   |           |   | 1.0 | 84   | Ireland .....                | 5.2   |   |           |   | 1.8 |
| 23   | Spain .....                | 6.0   |   |           |   | 1.4 | 85   | Honduras .....               | 5.2   |   |           |   | 1.9 |
| 24   | New Zealand .....          | 6.0   |   |           |   | 1.2 | 86   | Botswana .....               | 5.1   |   |           |   | 1.9 |
| 25   | Zambia .....               | 5.9   |   |           |   | 1.2 | 87   | Albania .....                | 5.1   |   |           |   | 1.8 |
| 26   | Croatia .....              | 5.9   |   |           |   | 1.5 | 88   | Belgium .....                | 5.1   |   |           |   | 1.7 |
| 27   | Estonia .....              | 5.9   |   |           |   | 1.5 | 89   | Uganda .....                 | 5.1   |   |           |   | 2.0 |
| 28   | Thailand .....             | 5.9   |   |           |   | 1.3 | 90   | United States .....          | 5.1   |   |           |   | 1.7 |
| 29   | Jordan .....               | 5.9   |   |           |   | 1.3 | 91   | Algeria .....                | 5.0   |   |           |   | 1.5 |
| 29   | Slovak Republic .....      | 5.9   |   |           |   | 1.1 | 92   | Lesotho .....                | 5.0   |   |           |   | 2.0 |
| 31   | Kyrgyz Republic .....      | 5.9   |   |           |   | 1.5 | 93   | Chad .....                   | 5.0   |   |           |   | 1.9 |
| 32   | Guatemala .....            | 5.9   |   |           |   | 1.4 | 93   | Suriname .....               | 5.0   |   |           |   | 1.8 |
| 33   | Switzerland .....          | 5.9   |   |           |   | 1.4 | 95   | Netherlands .....            | 5.0   |   |           |   | 1.6 |
| 34   | Panama .....               | 5.8   |   |           |   | 1.4 | 96   | Guyana .....                 | 5.0   |   |           |   | 1.8 |
| 35   | Uruguay .....              | 5.8   |   |           |   | 1.4 | 97   | United Kingdom .....         | 4.9   |   |           |   | 1.7 |
| 36   | Sri Lanka .....            | 5.8   |   |           |   | 1.6 | 98   | Mozambique .....             | 4.9   |   |           |   | 1.8 |
| 37   | Israel .....               | 5.8   |   |           |   | 1.4 | 99   | Trinidad and Tobago .....    | 4.9   |   |           |   | 1.8 |
| 38   | Iceland .....              | 5.8   |   |           |   | 1.0 | 100  | Singapore .....              | 4.9   |   |           |   | 1.5 |
| 39   | Slovenia .....             | 5.8   |   |           |   | 1.5 | 101  | Ethiopia .....               | 4.9   |   |           |   | 1.7 |
| 40   | Brazil .....               | 5.8   |   |           |   | 1.3 | 102  | Nigeria .....                | 4.8   |   |           |   | 1.8 |
| 41   | Bulgaria .....             | 5.8   |   |           |   | 1.6 | 103  | Bolivia .....                | 4.8   |   |           |   | 1.9 |
| 42   | Dominican Republic .....   | 5.8   |   |           |   | 1.7 | 104  | Bahrain .....                | 4.8   |   |           |   | 1.8 |
| 43   | Mali .....                 | 5.7   |   |           |   | 1.2 | 105  | El Salvador .....            | 4.7   |   |           |   | 1.7 |
| 44   | Morocco .....              | 5.7   |   |           |   | 1.6 | 106  | Japan .....                  | 4.6   |   |           |   | 1.5 |
| 45   | Cyprus .....               | 5.7   |   |           |   | 1.3 | 107  | Gambia .....                 | 4.6   |   |           |   | 1.9 |
| 46   | Moldova .....              | 5.7   |   |           |   | 1.5 | 108  | Qatar .....                  | 4.5   |   |           |   | 1.6 |
| 47   | Benin .....                | 5.7   |   |           |   | 1.4 | 109  | Sweden .....                 | 4.4   |   |           |   | 1.7 |
| 48   | Czech Republic .....       | 5.7   |   |           |   | 1.3 | 110  | Paraguay .....               | 4.4   |   |           |   | 1.9 |
| 49   | Malta .....                | 5.7   |   |           |   | 1.5 | 111  | Finland .....                | 4.4   |   |           |   | 1.3 |
| 50   | Mauritius .....            | 5.6   |   |           |   | 1.4 | 112  | Bangladesh .....             | 4.4   |   |           |   | 1.8 |
| 51   | Cambodia .....             | 5.6   |   |           |   | 1.6 | 113  | Pakistan .....               | 4.4   |   |           |   | 1.5 |
| 52   | Jamaica .....              | 5.6   |   |           |   | 1.6 | 114  | Denmark .....                | 4.4   |   |           |   | 1.8 |
| 53   | Tanzania .....             | 5.6   |   |           |   | 1.6 | 115  | Poland .....                 | 4.3   |   |           |   | 1.5 |
| 54   | Russian Federation .....   | 5.6   |   |           |   | 1.5 | 116  | Venezuela .....              | 4.3   |   |           |   | 1.7 |
| 55   | Philippines .....          | 5.6   |   |           |   | 1.5 | 117  | Bosnia and Herzegovina ..... | 4.3   |   |           |   | 2.1 |
| 56   | Lithuania .....            | 5.6   |   |           |   | 1.3 | 118  | Hungary .....                | 4.2   |   |           |   | 1.9 |
| 57   | Kenya .....                | 5.6   |   |           |   | 1.8 | 119  | Angola .....                 | 4.2   |   |           |   | 1.6 |
| 58   | Macedonia, FYR .....       | 5.5   |   |           |   | 1.9 | 120  | Korea, Rep. ....             | 4.1   |   |           |   | 1.8 |
| 59   | Canada .....               | 5.5   |   |           |   | 1.6 | 121  | Norway .....                 | 4.1   |   |           |   | 1.7 |
| 60   | Chile .....                | 5.5   |   |           |   | 1.6 | 122  | China .....                  | 3.9   |   |           |   | 2.0 |
| 61   | Ukraine .....              | 5.5   |   |           |   | 1.6 | 123  | Vietnam .....                | 3.9   |   |           |   | 2.0 |
| 62   | Mongolia .....             | 5.5   |   |           |   | 1.5 | 124  | Kuwait .....                 | 3.5   |   |           |   | 1.9 |

SOURCE: World Economic Forum, Executive Opinion Survey 2006

## Pillar 13

# Natural and cultural resources

## 13.01 Number of World Heritage sites

Number of World Heritage sites in the country, July 2006

RANK COUNTRY/ECONOMY HARD DATA

|    |                            |      |  |
|----|----------------------------|------|--|
| 1  | Italy.....                 | 43.0 |  |
| 2  | Spain.....                 | 39.0 |  |
| 3  | China.....                 | 33.0 |  |
| 4  | Germany.....               | 32.0 |  |
| 5  | France.....                | 30.0 |  |
| 6  | United Kingdom.....        | 27.0 |  |
| 7  | India.....                 | 26.0 |  |
| 7  | Mexico.....                | 26.0 |  |
| 9  | Russian Federation.....    | 23.0 |  |
| 10 | United States.....         | 20.0 |  |
| 11 | Brazil.....                | 17.0 |  |
| 12 | Australia.....             | 16.0 |  |
| 12 | Greece.....                | 16.0 |  |
| 14 | Sweden.....                | 14.0 |  |
| 15 | Canada.....                | 13.0 |  |
| 15 | Japan.....                 | 13.0 |  |
| 15 | Poland.....                | 13.0 |  |
| 15 | Portugal.....              | 13.0 |  |
| 19 | Czech Republic.....        | 12.0 |  |
| 20 | Peru.....                  | 10.0 |  |
| 21 | Belgium.....               | 9.0  |  |
| 21 | Bulgaria.....              | 9.0  |  |
| 21 | Turkey.....                | 9.0  |  |
| 24 | Argentina.....             | 8.0  |  |
| 24 | Austria.....               | 8.0  |  |
| 24 | Ethiopia.....              | 8.0  |  |
| 24 | Hungary.....               | 8.0  |  |
| 24 | Morocco.....               | 8.0  |  |
| 24 | Tunisia.....               | 8.0  |  |
| 30 | Algeria.....               | 7.0  |  |
| 30 | Egypt.....                 | 7.0  |  |
| 30 | Indonesia.....             | 7.0  |  |
| 30 | Korea, Rep.....            | 7.0  |  |
| 30 | Netherlands.....           | 7.0  |  |
| 30 | Norway.....                | 7.0  |  |
| 30 | Romania.....               | 7.0  |  |
| 30 | South Africa.....          | 7.0  |  |
| 30 | Sri Lanka.....             | 7.0  |  |
| 30 | Tanzania.....              | 7.0  |  |
| 40 | Bolivia.....               | 6.0  |  |
| 40 | Colombia.....              | 6.0  |  |
| 40 | Croatia.....               | 6.0  |  |
| 40 | Finland.....               | 6.0  |  |
| 40 | Pakistan.....              | 6.0  |  |
| 40 | Serbia and Montenegro..... | 6.0  |  |
| 40 | Slovak Republic.....       | 6.0  |  |
| 40 | Switzerland.....           | 6.0  |  |
| 48 | Chile.....                 | 5.0  |  |
| 48 | Israel.....                | 5.0  |  |
| 48 | Panama.....                | 5.0  |  |
| 48 | Philippines.....           | 5.0  |  |
| 48 | Thailand.....              | 5.0  |  |
| 48 | Vietnam.....               | 5.0  |  |
| 48 | Zimbabwe.....              | 5.0  |  |
| 55 | Denmark.....               | 4.0  |  |
| 55 | Ecuador.....               | 4.0  |  |
| 55 | Lithuania.....             | 4.0  |  |
| 55 | Mali.....                  | 4.0  |  |
| 55 | Nepal.....                 | 4.0  |  |
| 60 | Armenia.....               | 3.0  |  |
| 60 | Bangladesh.....            | 3.0  |  |
| 60 | Costa Rica.....            | 3.0  |  |

RANK COUNTRY/ECONOMY HARD DATA

|     |                             |     |  |
|-----|-----------------------------|-----|--|
| 60  | Cyprus.....                 | 3.0 |  |
| 60  | Georgia.....                | 3.0 |  |
| 60  | Guatemala.....              | 3.0 |  |
| 60  | Jordan.....                 | 3.0 |  |
| 60  | Kenya.....                  | 3.0 |  |
| 60  | Malta.....                  | 3.0 |  |
| 60  | New Zealand.....            | 3.0 |  |
| 60  | Uganda.....                 | 3.0 |  |
| 60  | Ukraine.....                | 3.0 |  |
| 60  | Venezuela.....              | 3.0 |  |
| 73  | Albania.....                | 2.0 |  |
| 73  | Estonia.....                | 2.0 |  |
| 73  | Gambia.....                 | 2.0 |  |
| 73  | Honduras.....               | 2.0 |  |
| 73  | Ireland.....                | 2.0 |  |
| 73  | Kazakhstan.....             | 2.0 |  |
| 73  | Latvia.....                 | 2.0 |  |
| 73  | Madagascar.....             | 2.0 |  |
| 73  | Malawi.....                 | 2.0 |  |
| 73  | Malaysia.....               | 2.0 |  |
| 73  | Mauritania.....             | 2.0 |  |
| 73  | Mongolia.....               | 2.0 |  |
| 73  | Nigeria.....                | 2.0 |  |
| 73  | Suriname.....               | 2.0 |  |
| 87  | Azerbaijan.....             | 1.0 |  |
| 87  | Bahrain.....                | 1.0 |  |
| 87  | Benin.....                  | 1.0 |  |
| 87  | Bosnia and Herzegovina..... | 1.0 |  |
| 87  | Botswana.....               | 1.0 |  |
| 87  | Cambodia.....               | 1.0 |  |
| 87  | Cameroon.....               | 1.0 |  |
| 87  | Dominican Republic.....     | 1.0 |  |
| 87  | El Salvador.....            | 1.0 |  |
| 87  | Iceland.....                | 1.0 |  |
| 87  | Luxembourg.....             | 1.0 |  |
| 87  | Macedonia, FYR.....         | 1.0 |  |
| 87  | Mauritius.....              | 1.0 |  |
| 87  | Moldova.....                | 1.0 |  |
| 87  | Mozambique.....             | 1.0 |  |
| 87  | Nicaragua.....              | 1.0 |  |
| 87  | Paraguay.....               | 1.0 |  |
| 87  | Slovenia.....               | 1.0 |  |
| 87  | Uruguay.....                | 1.0 |  |
| 87  | Zambia.....                 | 1.0 |  |
| 107 | Angola.....                 | 0.0 |  |
| 107 | Barbados.....               | 0.0 |  |
| 107 | Burkina Faso.....           | 0.0 |  |
| 107 | Burundi.....                | 0.0 |  |
| 107 | Chad.....                   | 0.0 |  |
| 107 | Guyana.....                 | 0.0 |  |
| 107 | Hong Kong SAR.....          | 0.0 |  |
| 107 | Jamaica.....                | 0.0 |  |
| 107 | Kuwait.....                 | 0.0 |  |
| 107 | Kyrgyz Republic.....        | 0.0 |  |
| 107 | Lesotho.....                | 0.0 |  |
| 107 | Namibia.....                | 0.0 |  |
| 107 | Qatar.....                  | 0.0 |  |
| 107 | Singapore.....              | 0.0 |  |
| 107 | Taiwan, China.....          | 0.0 |  |
| 107 | Tajikistan.....             | 0.0 |  |
| 107 | Trinidad and Tobago.....    | 0.0 |  |
| 107 | United Arab Emirates.....   | 0.0 |  |

SOURCE: UNESCO, World Heritage Centre

## 13.02 Carbon dioxide damage

Carbon dioxide damage as percentage of GNI, 2004

RANK COUNTRY/ECONOMY HARD DATA

|    |                       |     |
|----|-----------------------|-----|
| 1  | Chad                  | 0.0 |
| 2  | Switzerland           | 0.1 |
| 3  | Mali                  | 0.1 |
| 4  | Cambodia              | 0.1 |
| 5  | Sweden                | 0.1 |
| 6  | France                | 0.1 |
| 7  | Iceland               | 0.1 |
| 8  | Denmark               | 0.1 |
| 9  | Norway                | 0.1 |
| 10 | Austria               | 0.1 |
| 11 | Burkina Faso          | 0.2 |
| 12 | Netherlands           | 0.2 |
| 13 | Hong Kong SAR         | 0.2 |
| 14 | Japan                 | 0.2 |
| 15 | Italy                 | 0.2 |
| 16 | United Kingdom        | 0.2 |
| 17 | Uganda                | 0.2 |
| 18 | Cameroon              | 0.2 |
| 19 | Belgium               | 0.2 |
| 20 | Spain                 | 0.2 |
| 21 | Mozambique            | 0.2 |
| 22 | Germany               | 0.2 |
| 23 | Ireland               | 0.2 |
| 24 | Finland               | 0.2 |
| 25 | Luxembourg            | 0.2 |
| 26 | Tanzania              | 0.2 |
| 27 | Albania               | 0.2 |
| 28 | Costa Rica            | 0.2 |
| 29 | Portugal              | 0.2 |
| 30 | Namibia               | 0.3 |
| 31 | Guatemala             | 0.3 |
| 32 | New Zealand           | 0.3 |
| 33 | Uruguay               | 0.3 |
| 34 | El Salvador           | 0.3 |
| 35 | Burundi               | 0.3 |
| 36 | Zambia                | 0.3 |
| 37 | Barbados              | 0.3 |
| 38 | Benin                 | 0.3 |
| 39 | Peru                  | 0.3 |
| 40 | Cyprus                | 0.3 |
| 41 | Malawi                | 0.3 |
| 42 | Serbia and Montenegro | 0.3 |
| 43 | Greece                | 0.3 |
| 44 | Slovenia              | 0.3 |
| 45 | Angola                | 0.3 |
| 46 | United States         | 0.3 |
| 47 | Botswana              | 0.4 |
| 48 | Mauritius             | 0.4 |
| 49 | Canada                | 0.4 |
| 50 | Madagascar            | 0.4 |
| 51 | Paraguay              | 0.4 |
| 52 | Brazil                | 0.4 |
| 53 | Nepal                 | 0.4 |
| 54 | Sri Lanka             | 0.4 |
| 55 | Malta                 | 0.4 |
| 56 | Panama                | 0.4 |
| 57 | Kenya                 | 0.4 |
| 58 | Israel                | 0.4 |
| 59 | Mexico                | 0.4 |
| 60 | Bangladesh            | 0.4 |
| 61 | Singapore             | 0.4 |
| 62 | Australia             | 0.4 |

RANK COUNTRY/ECONOMY HARD DATA

|     |                        |     |
|-----|------------------------|-----|
| 63  | Hungary                | 0.4 |
| 64  | Colombia               | 0.4 |
| 65  | Croatia                | 0.5 |
| 66  | Chile                  | 0.5 |
| 67  | Korea, Rep.            | 0.5 |
| 68  | Lithuania              | 0.5 |
| 69  | Gambia                 | 0.5 |
| 70  | Turkey                 | 0.5 |
| 71  | Ethiopia               | 0.5 |
| 72  | Honduras               | 0.6 |
| 73  | Tunisia                | 0.6 |
| 74  | Ecuador                | 0.6 |
| 75  | Morocco                | 0.6 |
| 76  | Philippines            | 0.6 |
| 77  | Nigeria                | 0.6 |
| 78  | Nicaragua              | 0.6 |
| 79  | Argentina              | 0.6 |
| 80  | Georgia                | 0.7 |
| 81  | Slovak Republic        | 0.7 |
| 82  | Kuwait                 | 0.7 |
| 83  | Bolivia                | 0.7 |
| 84  | United Arab Emirates   | 0.7 |
| 85  | Indonesia              | 0.7 |
| 86  | Czech Republic         | 0.8 |
| 87  | Algeria                | 0.8 |
| 88  | Pakistan               | 0.8 |
| 89  | Jamaica                | 0.9 |
| 90  | Dominican Republic     | 0.9 |
| 91  | Venezuela              | 0.9 |
| 92  | Poland                 | 0.9 |
| 93  | Malaysia               | 0.9 |
| 94  | Armenia                | 0.9 |
| 95  | Romania                | 0.9 |
| 96  | Jordan                 | 1.0 |
| 97  | Thailand               | 1.0 |
| 98  | Vietnam                | 1.1 |
| 99  | South Africa           | 1.2 |
| 100 | Egypt                  | 1.2 |
| 101 | Estonia                | 1.2 |
| 102 | India                  | 1.3 |
| 103 | Bulgaria               | 1.4 |
| 104 | China                  | 1.4 |
| 105 | Macedonia, FYR         | 1.4 |
| 106 | Bahrain                | 1.4 |
| 107 | Guyana                 | 1.4 |
| 108 | Mauritania             | 1.5 |
| 109 | Bosnia and Herzegovina | 1.6 |
| 110 | Zimbabwe               | 1.6 |
| 111 | Kyrgyz Republic        | 1.6 |
| 112 | Suriname               | 1.7 |
| 113 | Moldova                | 1.8 |
| 114 | Tajikistan             | 2.0 |
| 115 | Russian Federation     | 2.0 |
| 116 | Trinidad and Tobago    | 2.3 |
| 117 | Kazakhstan             | 3.0 |
| 118 | Azerbaijan             | 3.4 |
| 119 | Mongolia               | 3.8 |
| 120 | Ukraine                | 4.5 |
| n/a | Latvia                 | n/a |
| n/a | Lesotho                | n/a |
| n/a | Qatar                  | n/a |
| n/a | Taiwan, China          | n/a |

SOURCE: World Bank, *World Development Indicators* 2006

## 13.03 Nationally protected areas

Nationally protected areas as percentage of total land area, 2004

RANK COUNTRY/ECONOMY HARD DATA

|    |                          |      |  |
|----|--------------------------|------|--|
| 1  | Venezuela .....          | 63.8 |  |
| 2  | Dominican Republic ..... | 51.9 |  |
| 3  | Denmark .....            | 34.0 |  |
| 4  | Austria .....            | 33.1 |  |
| 5  | Germany .....            | 32.6 |  |
| 6  | Zambia .....             | 31.9 |  |
| 7  | Tanzania .....           | 29.8 |  |
| 8  | Switzerland .....        | 29.7 |  |
| 9  | New Zealand .....        | 29.6 |  |
| 10 | United States .....      | 25.9 |  |
| 11 | Uganda .....             | 24.6 |  |
| 12 | Costa Rica .....         | 23.0 |  |
| 13 | Panama .....             | 21.7 |  |
| 14 | United Kingdom .....     | 20.8 |  |
| 15 | Indonesia .....          | 20.6 |  |
| 16 | Guatemala .....          | 20.0 |  |
| 17 | Chile .....              | 18.9 |  |
| 17 | Taiwan, China .....      | 18.9 |  |
| 19 | Botswana .....           | 18.5 |  |
| 19 | Cambodia .....           | 18.5 |  |
| 21 | Ecuador .....            | 18.3 |  |
| 22 | Nicaragua .....          | 17.8 |  |
| 23 | Ethiopia .....           | 16.9 |  |
| 24 | Czech Republic .....     | 16.1 |  |
| 25 | Israel .....             | 15.0 |  |
| 25 | Kyrgyz Republic .....    | 15.0 |  |
| 27 | Netherlands .....        | 14.2 |  |
| 28 | Thailand .....           | 13.9 |  |
| 29 | Namibia .....            | 13.6 |  |
| 30 | Sri Lanka .....          | 13.5 |  |
| 31 | Australia .....          | 13.4 |  |
| 31 | Bolivia .....            | 13.4 |  |
| 31 | Latvia .....             | 13.4 |  |
| 34 | France .....             | 13.3 |  |
| 35 | Poland .....             | 12.3 |  |
| 36 | Zimbabwe .....           | 12.1 |  |
| 37 | Estonia .....            | 11.8 |  |
| 38 | Burkina Faso .....       | 11.5 |  |
| 38 | Mongolia .....           | 11.5 |  |
| 40 | Benin .....              | 11.4 |  |
| 41 | Canada .....             | 11.3 |  |
| 42 | Malawi .....             | 11.2 |  |
| 43 | Lithuania .....          | 10.7 |  |
| 44 | Colombia .....           | 10.2 |  |
| 44 | Mexico .....             | 10.2 |  |
| 46 | Egypt .....              | 9.7  |  |
| 47 | Finland .....            | 9.3  |  |
| 48 | Chad .....               | 9.1  |  |
| 48 | Sweden .....             | 9.1  |  |
| 50 | Nepal .....              | 8.9  |  |
| 51 | Spain .....              | 8.5  |  |
| 52 | Mozambique .....         | 8.4  |  |
| 53 | Kenya .....              | 8.0  |  |
| 53 | Russian Federation ..... | 8.0  |  |
| 55 | Italy .....              | 7.9  |  |
| 56 | China .....              | 7.8  |  |
| 57 | Armenia .....            | 7.6  |  |
| 58 | Croatia .....            | 7.5  |  |
| 59 | Macedonia, FYR .....     | 7.1  |  |
| 60 | Hungary .....            | 7.0  |  |
| 61 | Korea, Rep. ....         | 6.9  |  |
| 62 | Japan .....              | 6.8  |  |

RANK COUNTRY/ECONOMY HARD DATA

|     |                              |     |  |
|-----|------------------------------|-----|--|
| 62  | Norway .....                 | 6.8 |  |
| 64  | Brazil .....                 | 6.7 |  |
| 65  | Angola .....                 | 6.6 |  |
| 65  | Argentina .....              | 6.6 |  |
| 65  | Portugal .....               | 6.6 |  |
| 68  | Azerbaijan .....             | 6.4 |  |
| 68  | Honduras .....               | 6.4 |  |
| 70  | Peru .....                   | 6.1 |  |
| 71  | Slovenia .....               | 6.0 |  |
| 71  | Trinidad and Tobago .....    | 6.0 |  |
| 73  | Burundi .....                | 5.7 |  |
| 73  | Malaysia .....               | 5.7 |  |
| 73  | Philippines .....            | 5.7 |  |
| 76  | South Africa .....           | 5.5 |  |
| 77  | India .....                  | 5.2 |  |
| 78  | Algeria .....                | 5.0 |  |
| 79  | Pakistan .....               | 4.9 |  |
| 80  | Romania .....                | 4.7 |  |
| 81  | Bulgaria .....               | 4.5 |  |
| 81  | Cameroon .....               | 4.5 |  |
| 81  | Singapore .....              | 4.5 |  |
| 84  | Madagascar .....             | 4.3 |  |
| 85  | Tajikistan .....             | 4.2 |  |
| 86  | Ukraine .....                | 3.9 |  |
| 87  | Albania .....                | 3.8 |  |
| 88  | Mali .....                   | 3.7 |  |
| 88  | Vietnam .....                | 3.7 |  |
| 90  | Greece .....                 | 3.6 |  |
| 91  | Paraguay .....               | 3.5 |  |
| 92  | Jordan .....                 | 3.4 |  |
| 93  | Nigeria .....                | 3.3 |  |
| 94  | Kazakhstan .....             | 2.7 |  |
| 95  | Gambia .....                 | 2.3 |  |
| 95  | Georgia .....                | 2.3 |  |
| 97  | Ireland .....                | 1.7 |  |
| 97  | Mauritania .....             | 1.7 |  |
| 99  | Turkey .....                 | 1.6 |  |
| 100 | Kuwait .....                 | 1.5 |  |
| 101 | Moldova .....                | 1.4 |  |
| 102 | Bangladesh .....             | 0.8 |  |
| 103 | Morocco .....                | 0.7 |  |
| 104 | Bosnia and Herzegovina ..... | 0.5 |  |
| 105 | El Salvador .....            | 0.4 |  |
| 106 | Tunisia .....                | 0.3 |  |
| 106 | Uruguay .....                | 0.3 |  |
| 108 | Lesotho .....                | 0.2 |  |
| 109 | United Arab Emirates .....   | 0.0 |  |
| n/a | Bahrain .....                | n/a |  |
| n/a | Barbados .....               | n/a |  |
| n/a | Belgium .....                | n/a |  |
| n/a | Cyprus .....                 | n/a |  |
| n/a | Guyana .....                 | n/a |  |
| n/a | Hong Kong SAR .....          | n/a |  |
| n/a | Iceland .....                | n/a |  |
| n/a | Jamaica .....                | n/a |  |
| n/a | Luxembourg .....             | n/a |  |
| n/a | Malta .....                  | n/a |  |
| n/a | Mauritius .....              | n/a |  |
| n/a | Qatar .....                  | n/a |  |
| n/a | Serbia and Montenegro .....  | n/a |  |
| n/a | Slovak Republic .....        | n/a |  |
| n/a | Suriname .....               | n/a |  |

SOURCE: World Bank, *World Development Indicators 2006*; national sources

## 13.04 Business concern for ecosystems

In your country, companies that harvest or process natural resources such as food, forest, or fishery products (1 = rarely concern themselves with the degradation of ecosystems, 7 = frequently take steps to preserve the ecosystems they depend on)

| RANK | COUNTRY/ECONOMY            | SCORE | 1 | MEAN: 3.9 | 7 | SD  | RANK | COUNTRY/ECONOMY              | SCORE | 1 | MEAN: 3.9 | 7 | SD  |
|------|----------------------------|-------|---|-----------|---|-----|------|------------------------------|-------|---|-----------|---|-----|
| 1    | Finland .....              | 6.3   |   |           |   | 0.7 | 63   | Mauritania .....             | 3.7   |   |           |   | 1.7 |
| 2    | Iceland .....              | 6.3   |   |           |   | 0.6 | 64   | El Salvador .....            | 3.6   |   |           |   | 1.3 |
| 3    | Sweden .....               | 6.0   |   |           |   | 1.0 | 65   | Nigeria .....                | 3.6   |   |           |   | 1.9 |
| 4    | Germany .....              | 6.0   |   |           |   | 0.9 | 66   | Colombia .....               | 3.6   |   |           |   | 1.4 |
| 5    | Austria .....              | 5.9   |   |           |   | 0.9 | 67   | Kuwait .....                 | 3.6   |   |           |   | 1.7 |
| 6    | Switzerland .....          | 5.9   |   |           |   | 1.0 | 68   | Turkey .....                 | 3.6   |   |           |   | 1.2 |
| 7    | New Zealand .....          | 5.9   |   |           |   | 1.0 | 69   | Tajikistan .....             | 3.5   |   |           |   | 1.5 |
| 8    | Norway .....               | 5.9   |   |           |   | 0.7 | 70   | Sri Lanka .....              | 3.5   |   |           |   | 1.4 |
| 9    | Luxembourg .....           | 5.8   |   |           |   | 0.9 | 71   | Argentina .....              | 3.5   |   |           |   | 1.4 |
| 10   | Netherlands .....          | 5.8   |   |           |   | 1.0 | 72   | Kenya .....                  | 3.5   |   |           |   | 1.8 |
| 11   | United Kingdom .....       | 5.6   |   |           |   | 1.3 | 73   | Jordan .....                 | 3.5   |   |           |   | 1.4 |
| 12   | Denmark .....              | 5.5   |   |           |   | 1.1 | 74   | Mexico .....                 | 3.4   |   |           |   | 1.4 |
| 13   | Australia .....            | 5.5   |   |           |   | 1.0 | 75   | Philippines .....            | 3.4   |   |           |   | 1.3 |
| 14   | Japan .....                | 5.4   |   |           |   | 1.1 | 76   | Kazakhstan .....             | 3.4   |   |           |   | 1.7 |
| 15   | Canada .....               | 5.4   |   |           |   | 1.2 | 77   | Benin .....                  | 3.4   |   |           |   | 1.6 |
| 16   | Belgium .....              | 5.3   |   |           |   | 1.1 | 78   | Egypt .....                  | 3.4   |   |           |   | 1.7 |
| 17   | United States .....        | 5.2   |   |           |   | 1.4 | 79   | Lesotho .....                | 3.3   |   |           |   | 1.5 |
| 18   | France .....               | 5.2   |   |           |   | 1.4 | 80   | Tanzania .....               | 3.3   |   |           |   | 1.5 |
| 19   | Ireland .....              | 5.1   |   |           |   | 1.3 | 81   | Trinidad and Tobago .....    | 3.3   |   |           |   | 1.5 |
| 20   | Tunisia .....              | 5.1   |   |           |   | 1.6 | 82   | Uganda .....                 | 3.3   |   |           |   | 1.7 |
| 21   | South Africa .....         | 4.9   |   |           |   | 1.1 | 83   | Bahrain .....                | 3.3   |   |           |   | 1.6 |
| 22   | Malaysia .....             | 4.9   |   |           |   | 1.4 | 84   | Venezuela .....              | 3.3   |   |           |   | 1.3 |
| 23   | Chile .....                | 4.9   |   |           |   | 1.2 | 85   | China .....                  | 3.3   |   |           |   | 1.5 |
| 24   | Portugal .....             | 4.8   |   |           |   | 1.0 | 86   | Honduras .....               | 3.3   |   |           |   | 1.5 |
| 25   | Czech Republic .....       | 4.8   |   |           |   | 1.3 | 87   | Romania .....                | 3.3   |   |           |   | 1.5 |
| 26   | Singapore .....            | 4.8   |   |           |   | 1.4 | 88   | Dominican Republic .....     | 3.2   |   |           |   | 1.3 |
| 27   | Estonia .....              | 4.7   |   |           |   | 1.3 | 89   | Algeria .....                | 3.2   |   |           |   | 1.5 |
| 28   | Slovak Republic .....      | 4.7   |   |           |   | 1.2 | 90   | Panama .....                 | 3.2   |   |           |   | 1.4 |
| 29   | Slovenia .....             | 4.7   |   |           |   | 1.4 | 91   | Macedonia, FYR .....         | 3.2   |   |           |   | 1.6 |
| 30   | Uruguay .....              | 4.6   |   |           |   | 1.4 | 92   | Malawi .....                 | 3.2   |   |           |   | 1.8 |
| 31   | Spain .....                | 4.6   |   |           |   | 1.3 | 93   | Nepal .....                  | 3.2   |   |           |   | 1.5 |
| 32   | Israel .....               | 4.6   |   |           |   | 1.1 | 94   | Azerbaijan .....             | 3.1   |   |           |   | 1.5 |
| 33   | Namibia .....              | 4.5   |   |           |   | 1.5 | 95   | Pakistan .....               | 3.1   |   |           |   | 1.6 |
| 34   | United Arab Emirates ..... | 4.5   |   |           |   | 1.5 | 96   | Ecuador .....                | 3.1   |   |           |   | 1.3 |
| 35   | Costa Rica .....           | 4.5   |   |           |   | 1.4 | 97   | Morocco .....                | 3.0   |   |           |   | 1.6 |
| 36   | Mauritius .....            | 4.5   |   |           |   | 1.1 | 98   | Ukraine .....                | 3.0   |   |           |   | 1.5 |
| 37   | Taiwan, China .....        | 4.3   |   |           |   | 1.3 | 99   | Vietnam .....                | 3.0   |   |           |   | 1.3 |
| 38   | Hungary .....              | 4.3   |   |           |   | 1.3 | 100  | Guyana .....                 | 3.0   |   |           |   | 1.6 |
| 39   | Hong Kong SAR .....        | 4.3   |   |           |   | 1.5 | 101  | Mozambique .....             | 3.0   |   |           |   | 1.5 |
| 40   | Poland .....               | 4.3   |   |           |   | 1.0 | 102  | Moldova .....                | 3.0   |   |           |   | 1.3 |
| 41   | Qatar .....                | 4.2   |   |           |   | 1.6 | 103  | Bolivia .....                | 3.0   |   |           |   | 1.5 |
| 42   | Brazil .....               | 4.2   |   |           |   | 1.6 | 104  | Bosnia and Herzegovina ..... | 3.0   |   |           |   | 1.7 |
| 43   | Zimbabwe .....             | 4.2   |   |           |   | 1.2 | 105  | Bulgaria .....               | 3.0   |   |           |   | 1.4 |
| 44   | Korea, Rep. ....           | 4.2   |   |           |   | 1.2 | 106  | Cambodia .....               | 2.9   |   |           |   | 1.6 |
| 45   | Latvia .....               | 4.2   |   |           |   | 1.5 | 107  | Kyrgyz Republic .....        | 2.9   |   |           |   | 1.5 |
| 46   | Thailand .....             | 4.1   |   |           |   | 1.2 | 108  | Nicaragua .....              | 2.9   |   |           |   | 1.3 |
| 47   | Cyprus .....               | 4.1   |   |           |   | 1.3 | 109  | Indonesia .....              | 2.9   |   |           |   | 0.9 |
| 48   | Greece .....               | 4.1   |   |           |   | 1.4 | 110  | Cameroon .....               | 2.8   |   |           |   | 1.3 |
| 49   | Italy .....                | 4.0   |   |           |   | 1.4 | 111  | Serbia and Montenegro .....  | 2.8   |   |           |   | 1.5 |
| 50   | Lithuania .....            | 4.0   |   |           |   | 1.4 | 112  | Georgia .....                | 2.7   |   |           |   | 1.2 |
| 51   | Croatia .....              | 3.9   |   |           |   | 1.4 | 113  | Russian Federation .....     | 2.7   |   |           |   | 1.5 |
| 52   | Jamaica .....              | 3.9   |   |           |   | 1.5 | 114  | Angola .....                 | 2.7   |   |           |   | 1.1 |
| 53   | India .....                | 3.9   |   |           |   | 1.4 | 115  | Burundi .....                | 2.6   |   |           |   | 1.7 |
| 54   | Barbados .....             | 3.8   |   |           |   | 1.3 | 116  | Suriname .....               | 2.5   |   |           |   | 1.4 |
| 55   | Malta .....                | 3.8   |   |           |   | 1.2 | 117  | Armenia .....                | 2.5   |   |           |   | 1.5 |
| 56   | Botswana .....             | 3.8   |   |           |   | 1.3 | 118  | Ethiopia .....               | 2.5   |   |           |   | 1.2 |
| 57   | Mali .....                 | 3.8   |   |           |   | 1.9 | 119  | Bangladesh .....             | 2.5   |   |           |   | 1.2 |
| 58   | Burkina Faso .....         | 3.7   |   |           |   | 1.7 | 120  | Paraguay .....               | 2.3   |   |           |   | 1.2 |
| 59   | Guatemala .....            | 3.7   |   |           |   | 1.3 | 121  | Chad .....                   | 2.3   |   |           |   | 1.6 |
| 60   | Gambia .....               | 3.7   |   |           |   | 1.6 | 122  | Albania .....                | 2.2   |   |           |   | 1.3 |
| 61   | Peru .....                 | 3.7   |   |           |   | 1.3 | 123  | Mongolia .....               | 2.2   |   |           |   | 1.2 |
| 62   | Madagascar .....           | 3.7   |   |           |   | 1.6 | 124  | Zambia .....                 | 1.9   |   |           |   | 1.3 |

SOURCE: World Economic Forum, Executive Opinion Survey 2006

## 13.05 Risk of malaria and yellow fever

Average of the malaria risk index and yellow fever risk index, 2006

| RANK | COUNTRY/ECONOMY              | HARD DATA | RANK | COUNTRY/ECONOMY           | HARD DATA |
|------|------------------------------|-----------|------|---------------------------|-----------|
| 1    | Austria .....                | 7.0       | 59   | Chile .....               | 5.5       |
| 1    | Bahrain .....                | 7.0       | 59   | Dominican Republic .....  | 5.5       |
| 1    | Belgium .....                | 7.0       | 59   | Egypt .....               | 5.5       |
| 1    | Bosnia and Herzegovina ..... | 7.0       | 59   | Jamaica .....             | 5.5       |
| 1    | Bulgaria .....               | 7.0       | 59   | Jordan .....              | 5.5       |
| 1    | Canada .....                 | 7.0       | 59   | Kazakhstan .....          | 5.5       |
| 1    | Croatia .....                | 7.0       | 59   | Lesotho .....             | 5.5       |
| 1    | Cyprus .....                 | 7.0       | 59   | Malta .....               | 5.5       |
| 1    | Czech Republic .....         | 7.0       | 59   | Mauritius .....           | 5.5       |
| 1    | Denmark .....                | 7.0       | 59   | Portugal .....            | 5.5       |
| 1    | Estonia .....                | 7.0       | 59   | Singapore .....           | 5.5       |
| 1    | Finland .....                | 7.0       | 59   | Trinidad and Tobago ..... | 5.5       |
| 1    | France .....                 | 7.0       | 59   | Tunisia .....             | 5.5       |
| 1    | Germany .....                | 7.0       | 59   | Turkey .....              | 5.5       |
| 1    | Greece .....                 | 7.0       | 77   | Tajikistan .....          | 5.2       |
| 1    | Hong Kong SAR .....          | 7.0       | 78   | Algeria .....             | 5.0       |
| 1    | Hungary .....                | 7.0       | 79   | Vietnam .....             | 4.8       |
| 1    | Iceland .....                | 7.0       | 80   | Botswana .....            | 4.8       |
| 1    | Ireland .....                | 7.0       | 81   | Namibia .....             | 4.6       |
| 1    | Israel .....                 | 7.0       | 82   | South Africa .....        | 4.2       |
| 1    | Italy .....                  | 7.0       | 83   | El Salvador .....         | 4.0       |
| 1    | Japan .....                  | 7.0       | 83   | Guatemala .....           | 4.0       |
| 1    | Kuwait .....                 | 7.0       | 83   | Honduras .....            | 4.0       |
| 1    | Latvia .....                 | 7.0       | 83   | Madagascar .....          | 4.0       |
| 1    | Lithuania .....              | 7.0       | 83   | Nicaragua .....           | 4.0       |
| 1    | Luxembourg .....             | 7.0       | 83   | Paraguay .....            | 4.0       |
| 1    | Macedonia, FYR .....         | 7.0       | 83   | Zambia .....              | 4.0       |
| 1    | Moldova .....                | 7.0       | 90   | Mauritania .....          | 3.9       |
| 1    | Mongolia .....               | 7.0       | 91   | China .....               | 3.7       |
| 1    | Netherlands .....            | 7.0       | 92   | Panama .....              | 3.6       |
| 1    | New Zealand .....            | 7.0       | 93   | Sri Lanka .....           | 3.5       |
| 1    | Norway .....                 | 7.0       | 94   | Brazil .....              | 3.4       |
| 1    | Poland .....                 | 7.0       | 95   | Nepal .....               | 3.3       |
| 1    | Qatar .....                  | 7.0       | 96   | Suriname .....            | 3.1       |
| 1    | Romania .....                | 7.0       | 97   | Colombia .....            | 3.0       |
| 1    | Russian Federation .....     | 7.0       | 98   | Ecuador .....             | 3.0       |
| 1    | Serbia and Montenegro .....  | 7.0       | 99   | India .....               | 2.9       |
| 1    | Slovak Republic .....        | 7.0       | 100  | Peru .....                | 2.9       |
| 1    | Slovenia .....               | 7.0       | 101  | Indonesia .....           | 2.7       |
| 1    | Spain .....                  | 7.0       | 102  | Thailand .....            | 2.6       |
| 1    | Sweden .....                 | 7.0       | 103  | Angola .....              | 2.5       |
| 1    | Switzerland .....            | 7.0       | 103  | Burundi .....             | 2.5       |
| 1    | Taiwan, China .....          | 7.0       | 103  | Cambodia .....            | 2.5       |
| 1    | Ukraine .....                | 7.0       | 103  | Ethiopia .....            | 2.5       |
| 1    | United Arab Emirates .....   | 7.0       | 103  | Gambia .....              | 2.5       |
| 1    | United Kingdom .....         | 7.0       | 103  | Guyana .....              | 2.5       |
| 1    | United States .....          | 7.0       | 103  | Kenya .....               | 2.5       |
| 1    | Uruguay .....                | 7.0       | 103  | Malawi .....              | 2.5       |
| 49   | Argentina .....              | 6.8       | 103  | Malaysia .....            | 2.5       |
| 50   | Costa Rica .....             | 6.4       | 103  | Mozambique .....          | 2.5       |
| 51   | Venezuela .....              | 6.4       | 103  | Nigeria .....             | 2.5       |
| 52   | Armenia .....                | 6.3       | 103  | Pakistan .....            | 2.5       |
| 52   | Azerbaijan .....             | 6.3       | 103  | Philippines .....         | 2.5       |
| 52   | Georgia .....                | 6.3       | 103  | Tanzania .....            | 2.5       |
| 52   | Korea, Rep. ....             | 6.3       | 103  | Uganda .....              | 2.5       |
| 52   | Kyrgyz Republic .....        | 6.3       | 103  | Zimbabwe .....            | 2.5       |
| 52   | Morocco .....                | 6.3       | 119  | Bolivia .....             | 1.6       |
| 58   | Mexico .....                 | 6.1       | 120  | Benin .....               | 1.0       |
| 59   | Albania .....                | 5.5       | 120  | Burkina Faso .....        | 1.0       |
| 59   | Australia .....              | 5.5       | 120  | Cameroon .....            | 1.0       |
| 59   | Bangladesh .....             | 5.5       | 120  | Chad .....                | 1.0       |
| 59   | Barbados .....               | 5.5       | 120  | Mali .....                | 1.0       |

SOURCE: World Economic Forum calculation based on World Health Organization *International Travel and Health 2006*



# Technical Notes and Sources

The data used in this *Report* represent the best available estimates from various national authorities, international agencies, and private sources at the time the *Report* was prepared. It is possible that some data will have been revised or updated by national sources after publication. Throughout the statistical tables in this publication, “n/a” denotes that the value is not available, or that available data are unreasonably outdated or do not come from a reliable source.

The following notes provide sources for the hard data—that is, the indicators listed in the Data Tables that do not come from the Executive Opinion Survey.

## Pillar 1: Policy rules and regulations

### 1.04 Visa requirements

*Visitor Visa Requirements Index, 2006*

This index was constructed based on visitor visa requirements of each country for visitors from a set of 10 countries from different continents and with a high degree of tourism travel, namely Canada, China, France, Germany, Italy, Japan, the Netherlands, Russia, the United Kingdom, and the United States. A value of 0 (100) on the index means that the country requires a visa for visitors from all (none) of the countries mentioned above. The data were obtained from each country’s respective embassy or consulate website.

Source: Booz Allen Hamilton Inc.

### 1.05 Openness of bilateral Air Service Agreements

*Index of openness of bilateral Air Service Agreements, 2005*

This index measures the average openness of all bilateral Air Service Agreements (ASAs) concluded by International Civil Aviation Organization (ICAO) signatories as registered in ICAO’s World’s Air Services Agreements (WASA) database (2005 update), weighted by bilateral scheduled passenger traffic taking place under each ASA. Regulatory data come from ICAO’s WASA database (2005), and traffic data were obtained from IATA.

Source: World Trade Organization

## Pillar 4: Health and hygiene

### 4.02 Physician density

*Physician density per 1,000 population, 2004 or most recent year available*

This variable measures the number of physicians per 1,000 people in the country. The World Bank defines *physicians* as graduates of any faculty of medicine who are working in the country in any medical field (practice, teaching, research).

Source: World Health Organization, *World Health Statistics 2006*, *World Health Report 2006*

### 4.03 Access to improved sanitation

*Access to adequate sanitation facilities as a percentage of total population*

According to the World Bank, this variable refers to the percentage of the population with at least adequate access to excreta disposal facilities that can effectively prevent human, animal, and insect contact with excreta. Improved facilities range from simple but protected pit latrines to flush toilets with a sewerage connection. To be effective, facilities must be correctly constructed and properly maintained.

Source: World Bank, *World Development Indicators 2006* (published version)

### 4.04 Access to improved drinking water

*Access to safe drinking water as a percentage of total population*

According to the World Bank, this variable refers to the percentage of the population with reasonable access to an adequate amount of water from an improved source, such as a household connection, public standpipe, borehole, protected well or spring, or rain-water collection. Unimproved sources include vendors, tanker trucks, and unprotected wells and springs. *Reasonable access* is defined as the availability of at least 20 liters per person per day from a source within 1 kilometer of the dwelling.

Source: World Bank, *World Development Indicators 2006* (published version)

## Pillar 5: Prioritization of Travel & Tourism

### 5.02 T&T government expenditure

*T&T government expenditure as a percentage of total budget, 2005*

This measure includes expenditures (transfers or subsidies) made by government agencies to provide T&T services such as cultural (e.g., art museums), recreational (e.g., national park), clearance (e.g., immigration/ customs), and so on to visitors.

Source: World Travel & Tourism Council, Tourism Satellite Accounting Research 2006, available at [www.wttc.org/tsa1.htm](http://www.wttc.org/tsa1.htm)

### 5.04 T&T fair attendance

*Index of country presence at 12 major T&T fairs, 2005–06*

This index was constructed as follows: a country was given a 1 for each time it was represented at one of the 12 T&T fairs (listed below) that took place during the period August 2005–July 2006. The score is the sum of all fairs at which the country was represented. The fairs included were: ITB Berlin, Salon Mondial du Tourisme (France), World Travel Market (London), Holiday World Prague, International Trade Fair for Tourism (Russia), Arabian Travel Market (Dubai), China International Travel Mart, Japan Association of Travel Agents (JATA) World Travel Fair, Travel and Tourism Fair (India), American Society of Travel Agents’ Trade Show, Travel Mart Latin America, and the International Tourism Fair of Latin America.

Source: Booz Allen Hamilton Inc.

## Pillar 6: Air transport infrastructure

### 6.02 Available seat kilometers

*Scheduled available seat kilometers per week originating in country (in millions), August 2005 and February 2006 average*

This variable measures an airline's passenger-carrying capacity; it is composed of the number of seats available on each flight multiplied by the flight distance in kilometers. The resulting variable is an average of the total for all scheduled flights in a week during August 2005 (summer schedule) and February 2006 (winter schedule).

Source: International Air Transport Association, SRS Analyser

### 6.03 Departures per 1,000 population

*Number of aircraft departures per 1,000 population, 2005*

Aircraft departures are the number of domestic and international take-offs of air carriers registered in the country. Source for departures and population is the *CIA World Factbook*.

Source: Booz Allen Hamilton Inc.

### 6.04 Airport density

*Number of airports per million population, 2005*

Runways of airports taken into account must be useable, but may be unpaved. Not all airports may have facilities for refueling, maintenance, or air traffic control. Source for underlying data is the *CIA World Factbook*.

Source: Booz Allen Hamilton Inc.

### 6.05 Number of operating airlines

*Number of airlines with scheduled flights originating in country, August 2005 and February 2006 average*

Source: International Air Transport Association, SRS Analyser

## Pillar 8: Tourism infrastructure

### 8.01 Hotel rooms

*Number of hotel rooms per 100 population, 2004 or most recent year available*

Source: United Nations World Tourism Organization; Economist Intelligence Unit

### 8.02 Presence of major car rental companies

*Index of presence of major car rental companies, 2006*

This variable measures the presence of seven major car rental companies: Avis, Budget, Europcar, Hertz, National Car Rental, Sixt, and Thrifty. Car Fleet data were supplemented by World Economic Forum research based on online sources.

Source: Car Fleet, No 29, Jan–Mar 2005; World Economic Forum

### 8.03 ATMs accepting Visa cards

*Number of automated teller machines (ATMs) accepting Visa credit cards, per million population, 2006*

Source: Visa International

## Pillar 9: ICT infrastructure

### 9.02 Internet users

*Internet users per 100 population, 2004 or most recent year available*

Source: International Telecommunication Union, *World Telecommunication Indicators 2005*; national sources

### 9.03 Telephone lines

*Main telephone lines per 100 inhabitants, 2004*

Source: International Telecommunication Union, *World Telecommunication Indicators 2005*; national sources

## Pillar 10: Price competitiveness in the T&T industry

### 10.01 Ticket taxes and airport charges

*Index of relative cost of access (ticket taxes and airport charges) to international air transport services, 2006*

This index measures the relative cost of access to international air transport services based on the level of airport charges, passenger ticket taxes, and value-added taxation. It reflects the costs associated with a narrow-body and a wide-body passenger plane arrival and departure at the major international airports in each country. Charges include landing, terminal navigation, passenger, and security charges as listed in the IATA Airport and Air Navigation Charges manual. Ticket taxes applicable to international travel were applied as described in the IATA List of Ticket and Airport Taxes and Fees manual. Per-passenger charges were calculated by applying a 75 percent load factor to a typical seating configuration of each type of aircraft. Value-added taxes (VATs) were calculated based on an average ticket price for each country and applied to half of the departing passengers, as the VAT is normally charged only on itineraries originating in the country concerned. A higher score indicates a lower level of charges and taxes.

Source: International Air Transport Association

### 10.02 Purchasing power parity

*Ratio of purchasing power parity (PPP) conversion factor to official exchange rate, 2005*

The purchasing power parity (PPP) conversion factors for 2005 were obtained from the International Monetary Fund (IMF)'s *World Economic Outlook* (April 2006). The official exchange rates for 2005 were obtained from the IMF's *International Financial Statistics Online* and from the World Bank's *World Development Indicators 2006*. The World Bank defines the *purchasing power parity conversion factor* as the number of units of a country's currency required to buy the same amount of goods and services in the domestic market as a US dollar would buy in the United States. *Official exchange rate* refers to the exchange rate determined by national authorities or to the rate determined in the legally sanctioned exchange market. It is calculated as an annual average based on monthly averages (local currency units relative to the US dollar). The variable shown is the result obtained by dividing the PPP conversion factor by the official exchange rate.

Source: International Monetary Fund; World Bank, *World Development Indicators Online Database* (August 2006)

### 10.04 Fuel price levels

*Retail diesel fuel prices (US cents per liter), 2004*

Source: Deutsche Gesellschaft für Technische Zusammenarbeit (GTZ) GmbH, *International Fuel Prices 2005*

## Pillar 11: Human resources

### 11.01 Primary education enrollment

*Gross primary education enrollment rate, 2004 or most recent year available*

According to the World Bank, the *gross primary enrollment rate* is the ratio of total enrollment, regardless of age, to the population of the age group that officially corresponds to the primary education level. Primary education provides children with basic reading, writing, and mathematics skills along with an elementary understanding of such subjects as history, geography, natural science, social science, art, and music.

Source: UNESCO, Institute for Statistics

### 11.02 Secondary education enrollment

*Gross secondary education enrollment rate, 2004 or most recent year available*

According to the World Bank, the *gross secondary enrollment rate* is the ratio of total enrollment, regardless of age, to the population of the age group that officially corresponds to the secondary education level. Secondary education completes the provision of basic education that began at the primary level, and aims at laying the foundations for lifelong learning and human development, by offering more subject- and skill-oriented instruction using more specialized teachers.

Source: UNESCO, Institute for Statics; World Bank, *World Development Indicators 2006* (published version); national sources

### 11.08 HIV prevalence

*HIV prevalence as a percentage of adults aged 15–49 years, 2003 or most recent year available*

Source: World Health Organization, *World Health Statistics 2006*, *World Health Report 2006*; national sources

### 11.09 Malaria incidence

*Malaria cases per 100,000 inhabitants, 2004 or most recent year available*

Source: World Health Organization (WHO) and UNICEF, *World Malaria Report 2005*; WHO Regional Offices; UNFPA, *State of World Population 2005*; World Bank, *World Development Indicators 2006 Online Database* (August 2006); UNDP, *Human Development Report 2006*; national sources

### 11.10 Tuberculosis incidence

*Tuberculosis cases per 100,000 inhabitants, 2004*

Source: World Health Organization, *World Health Statistics 2006*, *World Health Report 2006*, *Global Report 2006*; national sources

### 11.11 Life expectancy

*Life expectancy at birth (years), 2004*

Source: World Health Organization, *World Health Report 2006*; World Bank, *World Development Indicators 2006 Online Database* (August 2006); national sources

## Pillar 12: National tourism perception

### 12.01 Tourism openness

*Tourism expenditures and receipts as a percentage of GDP, 2004*

The ratio of the sum of international tourism expenditures and receipts to GDP. International tourism expenditures are expenditures of international outbound visitors in other countries, including payments to foreign carriers for international transport. International tourism receipts are expenditures of international inbound visitors in other countries, including payments to foreign carriers for international transport.

Source: World Bank, *World Development Indicators 2006 Online Database* (August 2006)

## Pillar 13: Natural and cultural resources

### 13.01 Number of World Heritage sites

*Number of World Heritage sites in the country, July 2006*

Source: UNESCO, World Heritage Centre

### 13.02 Carbon dioxide damage

*Carbon dioxide damage as a percentage of GNI, 2004*

Carbon dioxide damage is estimated to be \$20 per ton of carbon (the unit damage in 1995 US dollars) times the number of tons of carbon emitted.

Source: World Bank, *World Development Indicators 2006 Online Database* (August 2006)

### 13.03 Nationally protected areas

*Nationally protected areas as a percentage of total land area, 2004*

According to the World Bank, nationally protected areas are totally or partially protected areas of at least 1,000 hectares that are designated as scientific reserves with limited public access, national parks, natural monuments, nature reserves or wildlife sanctuaries, and protected landscapes. Marine areas, unclassified areas, and littoral (intertidal) areas are not included. The data also do not include sites protected under local or provincial law. Total land area is used to calculate the percentage of total area protected.

Source: World Bank, *World Development Indicators 2006* (published version); national sources

### 13.05 Risk of malaria and yellow fever

*Average of the malaria risk index and yellow fever risk index, 2006*

Risk for both diseases is ranked on a 0-to-4 scale by the World Health Organization, where 0 equals no risk and 4 equals high risk. Malaria risk is calculated by multiplying the recommended prevention level by the risk area (as a percentage of total land area). Yellow fever risk is given as the recommended vaccination level against yellow fever. This variable represents the average risk of malaria and yellow fever in the country.

Source: World Economic Forum calculation based on World Health Organization, *International Travel and Health 2006*.



## About the Authors

### Jennifer Blanke

Jennifer Blanke is Associate Principal and Senior Economist with the Global Competitiveness Network at the World Economic Forum. She has written and lectured extensively on issues related to national competitiveness. Previously, from 1998 to 2001, she was Senior Programme Manager responsible for developing the Business, Management and Technology section of the World Economic Forum's Annual Meeting in Davos. Before joining the Forum, Dr Blanke worked for a number of years as a Management Consultant for Eurogroup, Mazars Group in Paris, France, where she specialized in banking and financial market organization. Blanke obtained a Master's of International Affairs from Columbia University and an MA and a PhD in International Economics from the Graduate Institute of International Studies (Geneva).

### Thea Chiesa

Thea Chiesa is Associate Director and Head of Aviation, Travel and Tourism at the World Economic Forum. She has a background in business development and strategic planning in the Aerospace/Telecom industry, having spent nine years working with Telespazio both as part of Telecom Italia and Finmeccanica. At the Forum she has developed an expertise in the Travel & Tourism industry, having headed the community for four years. Coupled with her background in advanced communications systems, Ms Chiesa has developed a passion for the Travel & Tourism industry, and she is currently working with key government and industry leaders in developing strategies and implementing innovative projects in the field of T&T competitiveness and traveler information-sharing as well as rebranding campaigns. Ms Chiesa has a BSc in Management from Boston College and a Master's in International Relations from Boston University. She is currently a World Economic Forum Global Leadership Fellow.

### Brad Corrodi

Brad Corrodi is Managing Partner at Rosetta Marketing Group, where he is responsible for Travel and Leisure industries. Rosetta's work in the travel industry has been primarily in "noncommodity" sectors such as Tours, Cruises and Hospitality, where its quantitatively derived consumer segmentation and merchandising techniques have demonstrated the greatest impact on marketing and sales effectiveness. Mr Corrodi has been helping leading travel companies anticipate and respond to the turbulent, dynamic evolution of the industry for nearly 20 years. Previously, during his 12 years as a strategy consultant with Booz Allen Hamilton, he worked with leading airlines, GDSs, cruise lines, agencies, hospitality companies, operators, and retailers on a wide range of commercial

issues. He also consulted to governments in Europe, the Middle East, and Asia on aviation, airport, and tourism policy. Mr Corrodi's passion for the travel industry was ignited when working for Trans World Airlines, where he was part of the team that restructured and revitalized the TWA Getaway Vacations brand, creating flexible-itinerary packages with "live" scheduled flights to Florida and Hawaii following the sharp decline in trans-Atlantic traffic in 1986. Mr Corrodi earned his MBA with a concentration in Marketing from the Wharton School of Business, where he received a Dean's Award of Excellence. He earned his Bachelor's degree in Electrical Engineering from Yale University.

### John Elkins

John Elkins is Executive Vice President of Visa International, a post he has held since he joined the firm in 2003. Mr Elkins oversees worldwide strategic brand planning and research, formulates innovative global strategic marketing partnerships and alliances, coordinates both internal and external corporate communications worldwide, and is responsible for managing Visa's global corporate reputation. Mr Elkins is an active participant in the global regulatory environment for payment systems and has played a leading role in various regulatory efforts—both regional and country-specific. He has coordinated Visa International's brand, marketing partnerships, sponsorship, and corporate relations groups to drive business among Visa's merchant community and deepen cardholder loyalty. At the same time, Mr Elkins has been instrumental in forming strategic partnerships vital to Visa's ongoing corporate reputation. These relationships include work with the United Nations to develop microfinance activities in developing markets, as well as the creation of a multi-year agreement with the International Finance Corporation (World Bank) to help educate and develop credit bureaus in more than 30 emerging markets. Prior to joining Visa International, Mr Elkins was Founder, Chairman, and Chief Executive Officer of FutureBrand, a leading global brand consulting firm and a division of the Interpublic Group. He was responsible for the worldwide management of the firm, directing client accounts and growing the firm across 19 countries. From 1991 to 1999, Mr Elkins was Chief Executive Officer of the Naisbitt Group, where he led the worldwide expansion of the firm, specializing in future strategy consulting and contributing to its many publications, including *Megatrends*, which was published in 32 countries and was the Number One bestseller in the United States, Japan, and Germany. Mr Elkins has a BEd from the University of Exeter, England, and an MSc from the University of Oregon.

**Maurice Flanagan**

Maurice Flanagan is Executive Vice Chairman, Emirates Airline & Group. Mr Flanagan Joined BOAC (the predecessor of British Airways) in 1953 as a trainee after commissioned service in the Royal Air Force as a navigator. He worked in a variety of posts worldwide, and returned to the United Kingdom in 1965 as a Route Planning Manager. He became a member of British Airways' senior management in 1974. In 1978, Mr Flanagan left British Airways to become Managing Director of Dnata, of the government of Dubai, and then of Emirates when the airline was launched in 1985. He was made CBE in the Queen's Birthday Honours List in 2000 in recognition of his contribution to community relations in the United Arab Emirates and for services to aviation. Flanagan holds a Bachelor of Arts, is an Hon. Fellow of the Royal Aeronautical Society, a Fellow of the Royal Aeronautical Society, and a Fellow of the Chartered Institute of Logistics & Transport.

**Stephan Gross**

Stephan Gross is a Senior Associate in Booz Allen Hamilton's Munich office. Since joining the firm in 1999, he has been particularly active in top management consulting for clients in the aviation and logistics industry around the globe, especially on strategic assignments, such as re-organization, operational improvement, and turnaround projects. Dr Gross has worked particularly with clients in Europe and the Middle East on regulatory issues related to strategic transformation and privatization projects to support the competitiveness of state-owned incumbents in liberalized markets. Prior to joining Booz Allen Hamilton, he worked for a New Zealand-based merchant bank as an analyst in the corporate finance division with a focus on the Australasian infrastructure and utility sector. There he was responsible for evaluating publicly traded shares and was involved in due diligence work as a basis for bids on Australian airport privatizations. Dr Gross holds a BSc (Honors) from Northeastern University in Boston, an MBA from the University of Reutlingen in Germany, and a PhD from the University of Leipzig, Germany, where he focused on the impact of vertical and horizontal integration of publicly listed corporations.

**Thierry Geiger**

Thierry Geiger is an Economist with the Global Competitiveness Network at the World Economic Forum. His responsibilities include construction and computation of a range of indexes as well as data analysis for various projects and studies. His main areas of expertise are econometrics and international trade. Mr Geiger holds a BA in Economics from the University of Geneva with a specialization in monetary and financial economics, and an MA in Economics from the University of British Columbia, in Vancouver. Prior to joining the Forum, he completed several internships, notably at the World Trade Organization, Caterpillar Inc., and leading banks. During his studies, he was a Member of the Board of Junior Entreprise Genève. He is also Co-founder of Procab Studio S.A., an IT company based in Geneva.

**John Kester**

John Kester is Chief of the Market Intelligence & Promotion Department at the World Tourism Organization (UNWTO), where he has worked since 1999. He is involved in the preparation of the yearly Tourism Market Trends series of regional reports, and has contributed to

several occasional documents such as the report *Tourism Generating Markets: Overview and Country Profiles* and various reports prepared by UNWTO in the framework of the Tourism Recovery Committee. He has also been in charge of the final editing of the various volumes of the UNWTO's long-term forecast study *Tourism 2020 Vision*. Since its inception in 2003, he has been involved in the development of the UNWTO *World Tourism Barometer*, a publication aimed at monitoring the short-term evolution of tourism, issued three times a year. He also regularly collaborates on the preparation of news releases, as well as on the Facts & Figures section of the UNWTO website. Previously, Mr Kester worked in the UNWTO at the Statistics, Economic Analysis and Market Research section. Before joining the UNWTO he worked for seven years at Statistics Netherlands as a researcher in the field of socio-cultural statistics. Mr Kester graduated in Social Science with a specialization in research methodology and data analysis from the University of Leiden (the Netherlands).

**Geoffrey Lipman**

Geoffrey Lipman is Assistant Secretary-General of the World Tourism Organization (UNWTO). He is Chair of Green Globe 21, the responsible/sustainable tourism group, and of Green Global Village (GGV), its consultancy arm. He is President of the International Council of Tourism Partners (ICTP)—a platform connecting socially responsible tourism organizations and people, a Board Member of the Armstrong Hospitality Group (Canada) and Senior Tourism Research Fellow at George Washington University in the United States. Mr Lipman was the first President of the World Travel & Tourism Council (WTTC), the global business leaders' forum. Between 1990 and 1999, he shaped the WTTC's agenda during its growth from 10 to 100 members and the positioning of Travel & Tourism as the world's largest industry, as well as its Millennium Vision for open markets, elimination of barriers, and sustainable development. Prior to this he spent 20 years with the International Air Transport Association (IATA) as Executive Director and Head of Government Affairs. Mr Lipman has written and lectured around the world on tourism strategy, sustainability, and airline liberalization, has co-authored books on opening up European aviation and established a Think Tank on Free Trade in the Air. He has been a member of two European Union High Level Commissions—on Airline Liberalization and on Tourism Employment—as well as a member of the UK Roundtable on Sustainable Development.

**Samer Majali**

Samer Majali has served as President and Chief Executive Officer of Royal Jordanian Airlines since 2001 and was appointed Vice-Chairman in 2003. Mr Majali's career at Royal Jordanian, spanning over 25 years, has seen him heading a broad spectrum of departments including Corporate and Fleet Planning, Information Systems, Operations Control, and Airport Services. He has returned Royal Jordanian to profitability, and the airline was recently the first in the Middle East to be invited to membership of one of the three global airline alliances. Mr Majali is a member of the Jordanian National Council for Tourism and sits on the Board of Trustees of the Jordan River Foundation and on the Board of the King Hussein Cancer Foundation. Mr Majali has served as



President of the Arab Air Carriers Organization and is currently a Member of the IATA Board of Governors. He is a Fellow of the Royal Aeronautical Society and holds an MSc in Air Transport Management from Cranfield.

#### **Richard R. Miller**

Richard R. Miller is Executive Vice President at the World Travel & Tourism Council (WTTC). From its inception in 1991, he has played a principal role in shaping and directing the organization, policy agenda, research program, communications, and membership services for the WTTC. Mr Miller currently directs the Travel & Tourism Satellite Accounting Research Program, a research partnership with Oxford Economic Forecasting (OEF) to operationalize and implement the new international standard for Travel & Tourism economics. This effort is designed to help countries fulfill the United Nations' call for Travel & Tourism Satellite Accounting and provide both the public and private sectors with vital economic information for intelligent policy and business decisions. In his 17 years with the WTTC, Mr Miller has traveled worldwide speaking on the topic of Travel & Tourism economics. He has produced more than one hundred research reports focused on the economics of Travel & Tourism. Prior to joining the WTTC, Mr Miller served as management consultant with Deloitte & Touche in New York. As a member of the firm's Travel & Leisure Industry practice, Mr Miller directed a number of Travel & Tourism consulting projects, including the Strategic Plan for Tourism for the State of Hawaii, the feasibility study for Chicago's new Cominski Park, a strategic industry assessment for computer-maker Unisys, and a competitive analysis of JFK Airport. Mr Miller has a Master's degree in Business Administration from Southern Methodist University in Dallas and a Bachelor of Science degree in Mathematics from the University of Oklahoma.

#### **Marilyn Carlson Nelson**

Marilyn Carlson Nelson is Chairman and Chief Executive Officer of Carlson. *Forbes* magazine has regularly selected Ms Nelson as one of "The World's 100 Most Powerful Women." She is on the World Economic Forum's International Business Council, and in 2004 she co-chaired the Forum's Annual Meeting in Davos, Switzerland. She recently completed a presidential appointment as Chair of the National Women's Business Council, an advisory council to the President and Congress of the United States, and is currently Vice Chair of the U.S. Travel and Tourism Advisory Board. She recently received the National Business Travel Association's highest honor—the Icon Award—for a career of leadership in the business travel industry. In October 2006, H.E. Jean-David Levitte, French Ambassador to the United States, presented Ms Nelson with a French national honor created by Napoleon Bonaparte: Chevalier (Knight) in the French Légion d'Honneur. Ms Nelson was also named one of "America's Best Leaders" by *U.S. News and World Report*. She is a past national chair of the Travel Industry Association of America, has served as a delegate to the White House Conference on Tourism, and was on the Board of the U.S. National Tourism Organization. She is currently on the Singapore Tourism Board. Outside her industry Ms Nelson serves on the boards of Exxon Mobil Corporation, the Mayo Clinic Foundation, and the Committee to Encourage Corporate Philanthropy.

#### **Brian Pearce**

Brian Pearce is Chief Economist of International Air Transport Association (IATA). An economist with over 20 years of international experience in several industries, he was formerly Head of Global Economic Research at UBS Warburg and Chief Economist at Ernst & Young. Prior to joining IATA, Mr Pearce was involved in the *UK Air Transport White Paper* and in the discussion and design of policies to influence aviation's impact on the environment. He also advised on the financial sector's role in promoting good corporate governance and responsibility, and directed the initiative launched by the UK Prime Minister at the World Summit on Sustainable Development. Before that he was Head of Global Economic Research at the investment bank SBC Warburg (now UBS), in Tokyo and then London. During this time he published extensively on international financial and economic issues and advised private and public sector clients in over 20 countries. As Chief Economist at Ernst & Young's economic forecasting consultancy, the ITEM Club, he worked with the UK Treasury's and other econometric models to analyze public policy and forecast global economic prospects. He was frequently called on by television, radio and the press to comment on government economic policy.

#### **Jürgen Ringbeck**

Jürgen Ringbeck is a Senior Partner, Senior Vice President, and a Member of the Board of Directors of Booz Allen Hamilton based in Düsseldorf. He heads the Global Commercial Transportation Practice, the group that includes all Booz Allen Hamilton's consulting activities in the transportation industries, such as airlines, tourism operators, postal and logistics companies, and railways. Before becoming Partner of Booz Allen Hamilton, Dr Ringbeck was Partner of McKinsey & Company, where he was Co-leader of the Transportation Group. In total he has more than 18 years in top-level management consulting. Dr Ringbeck holds a Diploma in Mathematics from the University of Münster and a PhD in Economics from the University of Osnabrück. Before starting his career as a Management Consultant, he worked as a University Assistant and Guest Professor at the University of Toronto. Dr Ringbeck is author of several business books (including the US business bestseller *Do IT Smart*) and numerous publications in business strategy and IT management. He has also received several awards for his work from major institutions, including the Marketing Science Institute (Cambridge USA).

#### **Geoffrey Weston**

Geoffrey Weston currently holds the post of Vice President Cargo at Royal Jordanian Airlines. He joined the airline in 2004 as Head of Planning and Network Development. Prior to his work at Royal Jordanian, Mr Weston spent over 10 years as a strategy consultant and interim manager. He worked for many years at Bain & Company in their Latin American practice, based in Mexico City. Mr Weston holds a degree from Oxford University.





**The World Economic Forum would like to thank the following organizations for their invaluable support of this *Report*.**

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Bombardier Inc. is a global corporation headquartered in Canada. Revenues for the fiscal year ended January 31, 2006, were US\$14.7 billion; shares are traded on the Toronto stock exchange (BBD).

## Booz | Allen | Hamilton

Booz Allen Hamilton has been at the forefront of management consulting for businesses and governments for more than 90 years. Providing consulting services in strategy, operations, organization and change and information technology, Booz Allen is the one firm that helps clients solve their toughest problems, working by their side to help them achieve their missions.

Booz Allen is committed to delivering results that endure.

With more than 18,000 employees on six continents, the firm generates annual sales of over US\$3.7 billion. Booz Allen has been recognized as a consultant and employer of choice. In 2005 and in 2006, *Fortune* magazine named Booz Allen one of "The 100 Best Companies to Work For," and for the past eight years, *Working Mother* magazine has ranked the firm among its "100 Best Companies for Working Mothers."

To learn more about the firm, visit Booz Allen's web site at [www.boozallen.com](http://www.boozallen.com). To learn more about the best ideas in business, visit [www.strategy-business.com](http://www.strategy-business.com), the web site for *strategy+business*, a quarterly journal sponsored by Booz Allen.



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Based in Minneapolis, Carlson's brands and services employ about 190,000 people in more than 150 countries.

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Emirates Airline & Group operates 101 wide-bodied aircraft (including 9 freighters) to 87 international destinations. The fleet will expand to over 150 aircraft by 2012, and will include 43 A380s—the largest order for this aircraft placed by any airline. Although owned by the government of Dubai, Emirates receives no subsidy of any kind and no protection against competition in its home market.

As well as Emirates and Dnata, the Group includes the tour operator Emirates Holidays; the Dubai destination management company Arabian Adventures; the conservation-based Emirates Al Maha Desert Resort; and Mercator, an air transport and travel software business. Dnata's original airport handling and travel agency businesses continue to flourish. The Group, which has 26,900 staff, has a 43.6 percent equity stake in Sri Lankan Airlines, with a management contract.

Dnata is the largest and most influential non-airline travel business in the Middle East and West Asia region, providing all ramp, cargo, and passenger handling at Dubai International Airport; ground handling operations in Singapore; and joint ventures at airports in Pakistan, Iran, Sudan, and the Philippines. Dnata also has a travel agency division supplying wholesale and retail travel products and travel-related computer services.



The International Air Transport Association (IATA), founded in April 1945, is the prime vehicle for inter-airline cooperation in promoting safe, reliable, secure, and economical air services. Today IATA represents 250 airlines comprising 94 percent of international scheduled air traffic.



Qatar Airways is one of the world's fastest-growing airlines, achieving unprecedented growth averaging 35 percent year on year.

It relaunched in 1997 under the guidance and vision of His Highness Sheikh Hamad Bin Khalifa Al Thani, Emir of Qatar, whose mandate was clear—to create a premium quality airline that would excel in service and set industry standards, which others could only admire with envy.

Qatar Airways excels in leadership and innovation—it was the first in the world to pass the International Air Transport Association (IATA) Operational Safety Audit with a maximum 100 percent compliance in 2003.

Ten years on, under the leadership of Chief Executive Officer Akbar Al Baker, Qatar Airways has developed into an award-winning business, achieving a Five Star ranking for superior levels of service both in the air and on the ground.

Today, Qatar Airways operates more than 70 scheduled routes worldwide with a modern fleet of more than 50 all-Airbus aircraft.



Royal Jordanian Airlines was established in 1963 upon the initiative of his late Majesty King Hussein, and has been flying continuously ever since. With a fleet of 25 aircraft, Royal Jordanian flies to over 50 destinations, serving the widest network of international airports in the Middle East and Arab World of any airline. Based in Amman, the airline also serves Europe, Asia, and the United States. With three destinations in the United States, Royal Jordanian also has the most extensive coverage of the United States of any Middle Eastern airline. It was the first airline in the Middle East invited to join one of the three global airline alliances, and will become part of oneworld in early 2007.

Restructured over the past few years, Royal Jordanian operates as a public shareholding company with no support (direct or indirect) from the Jordanian government. It is on track for privatization of the core business in 2007, with most of the auxiliary businesses already spun off successfully. Royal Jordanian has generated a net profit since 2004. Its recent strategy has created a strong regional network, which supports His Majesty King Abdullah's vision of Amman positioning itself as a regional hub.



Silversea is a cruise company reflecting generations of maritime and travel experience. In the early 1990s, the Lefebvre family of Rome, former owners of Sitmar Cruises, conceived and organized a unique cruise company pledging to build and operate the highest-quality ships in the ultra-luxury segment.

Silversea launched its first ship, *Silver Cloud*, in 1994, followed by *Silver Wind* in 1995, *Silver Shadow* in 2000, and the newest ship, *Silver Whisper* in 2001. The fleet was purpose-built for the ultra-luxury market, establishing a new class of smaller, intimate vessels that could slip into more exotic ports off the beaten path. These elite vessels were specifically designed for fewer guests, more space, and the highest levels of personalized service, delivered by Italian officers and European staff.

Taking the company into the future is Albert Peter, Silversea's Chief Executive Officer. Since taking the leadership reins in June 2001, Mr. Peter has steered the company to a steady course of high customer satisfaction, financial stability, and new product innovation.



Swiss International Air Lines is Switzerland's national airline, serving 69 destinations around the world from its Zurich hub and from Basel and Geneva international airports. Operating a fleet of 69 aircraft, SWISS is a key player within the Lufthansa Group and the global Star Alliance. SWISS will remain true to its mission of providing quality air services that link Switzerland with Europe and the world.

People who fly with SWISS should always feel at home. And, with its core values of "personal care," "Swiss hospitality," and "quality down to the finest detail," SWISS will continue to maintain its high market profile as Switzerland's national airline, committed at all times to providing first-class service on board and on the ground.



The World Tourism Organization (UNWTO) is the specialized agency of the United Nations in the field of tourism and the leading international organization for the sector. The UNWTO serves as a global forum for tourism policy issues and practical source of tourism know-how.

In the year 2006, UNWTO celebrated a twofold anniversary: 60 years of international work in favor of tourism, travel, and development, and its 30th anniversary in Spain. The organization plays a central role within the UN System in promoting the development of responsible, sustainable, and universally accessible tourism within the framework of the Millennium Development Goals.

The UNWTO encourages the implementation of the Global Code of Ethics for Tourism, with a view to ensuring that member countries, tourist destinations, and businesses maximize the positive economic, social, and cultural effects of tourism and fully reap its benefits, while minimizing its negative social and environmental impacts.

In 2007, the UNWTO's membership is comprised of 150 countries, 7 territories, and more than 300 Affiliate Members representing the private sector, educational institutions, tourism associations, local tourism authorities, and civil society.



Visa is a private, membership association jointly owned by more than 20,000 member financial institutions around the world. The organization is dedicated to connecting those members, their cardholders, and their merchant clients through the world's largest electronic payments network.

Visa products allow buyers and sellers to conduct commerce with ease and confidence in both the physical and virtual worlds. And, with 1.46 billion cards in circulation that generate more than US\$4.3 trillion in global sales, as well as unsurpassed acceptance in more than 170 countries and more than 24 million locations worldwide, the reach and popularity of Visa-branded cards is nearly universal.

Visa is headquartered in San Francisco, California, and has six regions and a corporate headquarters. For more information, visit [www.corporate.visa.com](http://www.corporate.visa.com).



The World Travel & Tourism Council (WTTC) is the global business leaders' forum for Travel & Tourism. Its Members are the Chairmen and Chief Executives of 100 of the world's foremost organizations, representing all regions of the world and all sectors of the industry.

Travel & Tourism is one of the world's largest industries, employing approximately 230 million people and generating over 10 percent of world GDP. As the voice of the global private sector, WTTC works together with governments to raise awareness of the economic and social importance of our industry across the world. WTTC's extensive economic research—Tourism Satellite Accounting—provides public and private sector decision makers with estimates and forecasts for the direct and indirect impacts of Travel & Tourism activity. The research identifies Travel & Tourism's contribution to capital investment, exports, gross domestic product, and jobs for more than 174 countries across the world.

