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Polish Road Transport Characteristics

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Abstract- Polish road transportation system has recently been referred to as Tigers or Kings of Europe with its leading position being emphasized among other European countries. Therefore, it is about time the true condition of the system was revealed. The following presentation thoroughly illustrates the actual state of Polish road transportation system in 2012. Once the lecture of this article is finished, each reader can come to his own conclusions regarding road transport in Poland and decide whether monarchist terms of any kind are appropriate for this system description.

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Polish Road Transport Characteristics

Zdzisław Kordel^α, Jerzy Waśkiewicz^σ & Krystyna Bentkowska^ρ

Abstract- Polish road transportation system has recently been referred to as *Tigers or Kings of Europe* with its leading position being emphasized among other European countries. Therefore, it is about time the true condition of the system was revealed. The following presentation thoroughly illustrates the actual state of Polish road transportation system in 2012. Once the lecture of this article is finished, each reader can come to his own conclusions regarding road transport in Poland and decide whether monarchist terms of any kind are appropriate for this system description.

I. THE NUMBER OF COMPANIES AND VEHICLES USED IN ROAD TRANSPORT OF GOODS

According to surveys, transportation of cargo by means of road transport in 2011 came up to the total of nearly 1322.24 million tons which is 1.53 times more in relation to the volume of traffic in 2005.

The overall volume of freight mainly consists of domestic services and their share in the aforementioned years amounted to approximately 94% and 89%. The drop in the share of national transport is mainly caused by the significant growth of international traffic, especially since Polish EU accession, which resulted in a vast growth from about 6% in 2005 to almost 11% in 2011.

In 2005, the share of Polish road freight transport in the total number of overall volume carried out by the EU members, that is 15 803 million tons, accounted for almost 5% (863.4 million tons) and in 2010 this number increased to 8.18% (1216 million tons) of the total 14 861 million tons which gave it the 6th place among all EU countries, for this type of operation.

The increase in the volume of road freight transport was made possible due to the systematic increase in the number of companies and vehicles, especially since 2004 (Table 1).

Table 1 : The number of companies and vehicles in international road transport in the years 1996 – 2011

Years	Companies (in the possession of a transport service license)		Vehicles (legally authorised)		The average number of vehicles in the company	
	State as of December 31st	Number	Increase in relation to the previous year %	Number		Increase in relation to the previous year %
1996		4537	X	19997	X	4,41
1997		5819	28,26	21470	7,37	3,69
1998		6945	19,35	23275	8,41	3,35
1999		7480	7,7	23883	2,61	3,19
2000		7774	3,93	25705	7,63	3,31
2001		8528	9,7	27854	8,36	3,27
2002		8716	2,2	31927	14,62	3,66
2003		9757	11,94	41119	28,79	4,21
1.05.2004		8980	-7,96	44683	8,67	4,98
2004		11835	31,79	59706	33,62	5,04
2005		13534	14,36	72576	21,56	5,36
2006		16311	20,52	92283	27,15	5,66
2007		20302 ^{a)}	24,47	112174	21,55	5,53
2008		23006 ^{b)}	13,32	126785	13,03	5,51
2009		23605 ^{c)}	2,60	128663	1,48	5,45
2010		24232 ^{d)}	2,66	137502	6,87	5,67
2011		25868 ^{e)}	6,75	147970	7,61	5,72

- a) In addition, 178 companies did not possess any vehicles
- b) In addition, 272 companies did not possess any vehicles
- c) In addition, 250 companies did not possess any vehicles
- d) In addition, 663 companies did not possess any vehicles
- e) In addition, 550 companies did not possess any vehicles

Source: statement based on BOTM data

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Considering the aforementioned figures, it is easy to observe that despite the economic slowdown, that first appeared in 2007, the last four years in road transportation sector resulted in a steady increase of both the number of companies and their fleet. In the following years of 2007- 2009, that is during the global economic crisis, more than 3 thousand new companies were established as well as over 16 thousand new vehicles were bought in Poland.

More liberal rules and regulations, that had been implemented, led to an easier access to carriers' profession, abolition of customs duties across the whole EU Community, European and transcontinental trade development (globalization with Poland being in the very heart of East and West trade routes) as well as good economic situation throughout the past years and easier way of acquiring means of transportation (credits, loans, lease agreements, possibility to purchase vehicles in other EU countries at bargain prices) are all main factors that have enabled a vast growth of the number of companies and vehicles operating in road transportation services in our country.

However, it is worth to mention the fact that although some progress on consolidation can be expected the supply side of the international transport market is still very fragmented. Throughout the years 2005-2011 small carriers' participation (from 1 to 10 vehicles) in the total number of companies decreased from 91% to about 89%, whereas the average companies' share (11 to 50 vehicles) increased from 8% to almost 10%, while the biggest companies (51 vehicles) recorded an increase from 0.6% to 1.0%.

In the light of these facts and figures, a conclusion can be made that Polish carriers had been

relatively well prepared for a wider expansion of EU community market, as its liberalization was progressing. What is more, not only had they been ready to fulfill the existing market requirements but also to live up to the competitors across the border. This was all made possible through a whole variety of steps that had been cautiously taken well ahead of time such as learning foreign languages, becoming acquainted with the EU laws and regulations being in force, fulfilling its strict ecological requirements regarding fleet and equipment, developing skills and qualifications of personnel and last but not least working hard on keeping existing and gaining new business partners operating in the road transportation sector.

The number of companies and vehicles in domestic transport (Table 2) presents its significant predominance over the corresponding values of international transport. It had been this way back in 2004 already, when the number of companies in domestic transport amounted to 41.4 thousand which was more than 4 times higher than in international traffic, whereas in 2011 – 2.5 times. The growth of companies in this period in domestic transport sector came up to the total of about 20 thousand, while in the international sector it was more than 14 thousand. On the other hand, the increase in the number of vehicles was 77 thousand in 2004 and more than 88 thousand in 2011, which indicates a bigger growth in the sector of international transport. This difference is affected by the growth in the average number of vehicles possessed that slightly increased resulting in an average of 3 vehicles per company in 2011 in terms of domestic transportation sector and 5.7 vehicle per company in the international market.

Table 2 : Number of licenses and copies of licenses in domestic road transport in the years 2004-2010

Years (data as of the end of the year)	License (companies) [in thousand]	Increase in comparison to the previous year %	Copies of licenses (vehicles) [thousand]	Increase in comparison to the previous year %	The average number of vehicles in a company
2004	41,4	X	X	X	X
2005	45,2	9,18	119,3	X	2,64
2006	51,2	13,27	134,1	12,41	2,62
2007	57,0	11,33	155,1	15,66	2,72
2008	61,5	7,89	173,3	11,73	2,82
2009	62,2	1,14	180,5	4,15	2,90
2010	61,2	-1,61	181,2	0,39	2,96
2011	64,4	5,23	196,1	8,22	3,05

Source: Data from the Ministry of Transport, Construction and Maritime Economy

It should be noted that the total number of licenses given also includes carriers acting as agents in the process of goods transportation services, so called freight forwarders. This state, however, is fully consistent with the provisions stipulated in the Road Transport Act (Article 4, Paragraph 3b – Journal of Laws of 2005, No. 180, item. 1497), thus making it difficult to separate carriers without vehicles (referred to as pure agents)

from licensed carriers actively participating in the actual transportation of goods. In addition, some firms perform both types of activities mentioned at the same time.

International road transport licenses (referred to as communal) also entitle its bearers to operate in the national transport (in accordance with the Article 12, Paragraph 2a of the aforementioned Act). This means that the actual number of companies providing dome-

stic services only (often exceeding the borders of Poland) becomes very difficult to determine.

II. COMPANIES AND VEHICLES ACCORDING TO VOIVODESHIP

The table below shows an interesting characteristics of Polish road transportation, presenting a

combination of freight transport companies operating in international traffic along with the number of vehicles they possess and their exact location. Table 3 was prepared according to the state as of June 2012.

Table 3 : Companies and vehicles in international road transport according to territorial division (by voivodeship)–as of June 2012

Voivodeship	Companies			Vehicles			Average number of vehicles in the company
	Number	share %	Rank	Number	share %	Rank	
Poland	25473	100,00	X	146118	100,00	X	5,7
Lower Silesian (dolnośląskie)	1502	5,90	7	8524	5,83	6	5,7
Kuyavian-Pomeranian (kujawsko-pomorskie)	1014	3,98	12	5784	3,96	12	5,7
Lublin Voivodeship (Lubelskie)	1602	6,29	6	7753	5,31	7	4,8
Lubusz Voivodeship (Lubuskie)	1140	4,48	10	7104	4,86	9	6,2
Łódź Voivodeship (Łódzkie)	1713	6,72	5	8931	6,11	5	5,2
Lesser Poland (Małopolskie)	1899	7,45	4	10398	7,12	4	5,5
Masovian (Mazowieckie)	4771	18,73	1	29311	20,06	1	6,1
Opole Voivodeship (Opolskie)	545	2,14	16	3661	2,51	15	6,7
Subcarpathian (Podkarpackie)	1119	4,39	11	6040	4,13	11	5,4
Podlaskie Voivodeship (Podlaskie)	893	3,51	13	4361	2,98	13	4,9
Pomeranian (Pomorskie)	1375	5,40	8	7550	5,17	8	5,5
Silesia (Śląskie)	2557	10,04	3	15185	10,39	3	5,9
Świętokrzyskie Voivodeship (Świętokrzyskie)	665	2,61	14	3982	2,73	14	6,0
Warmian-Masurian (Warmińsko-Mazurskie)	642	2,52	15	2874	1,97	16	4,5
Greater Poland (Wielkopolskie)	2753	10,81	2	17674	12,10	2	6,4
West Pomeranian (Zachodniopomorskie)	1283	5,04	9	6986	4,78	10	5,4

Source: own study based on BOTM database.

The numbers presented in the above table are accompanied by the percentage of voivodeship share in the total number of companies and vehicles in the country. The regions have been listed according to their rank position, with the average number of vehicles per company in the region.

The number of companies and vehicles in accordance with their rank position are shown in Figures 1 and 2.

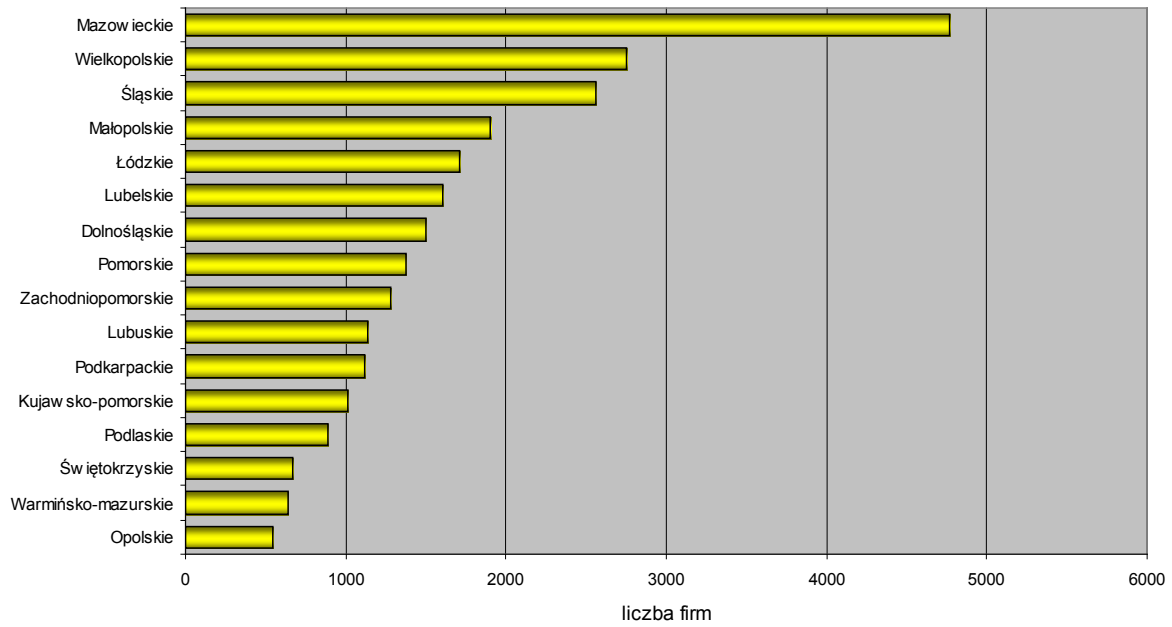


Figure 1 : Number of international transport companies according to voivodeship as of June 2012.
Source: Table 3

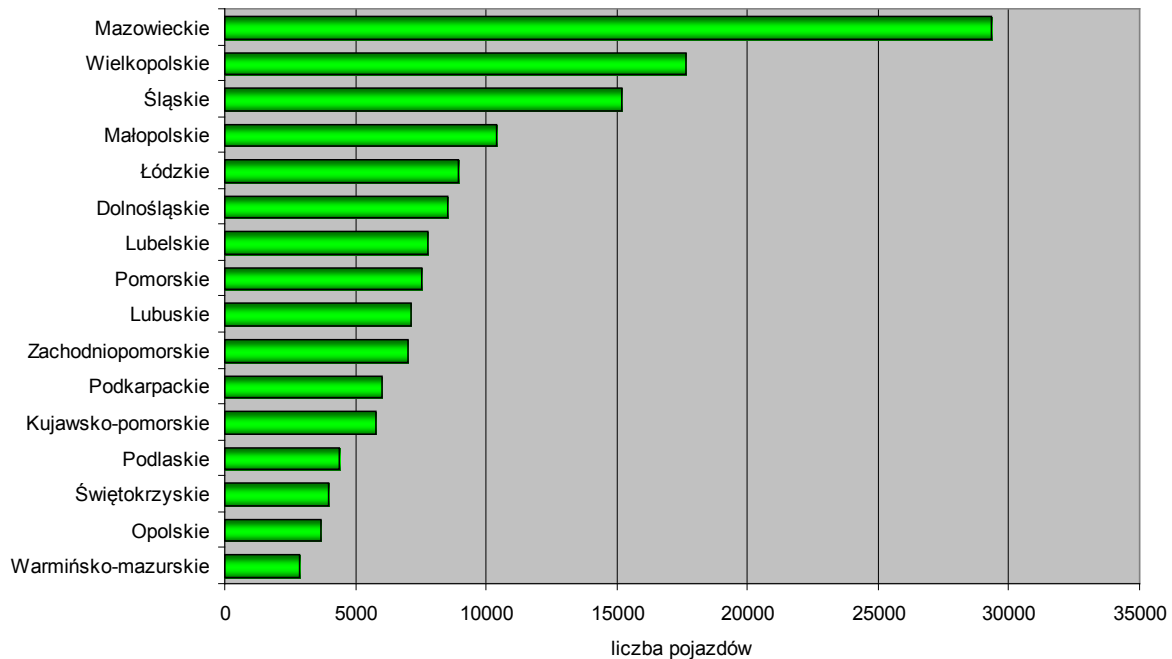


Figure 2 : The number of vehicles in international transport according to voivodeship as of June 2012
Source: Table 3

The figures above show that voivodeships such as: Masovia (Mazowieckie), Greater Poland (Wielkopolskie), Silesia (Śląskie) and Lesser Poland (Dolnośląskie) that take the lead in the rank for biggest number of companies can be also found on similar places in vehicles number rank. The smallest number of companies are located in regions such as: Opole, Warmia and Mazury and Świętokrzyskie, while on the other hand the fewest

vehicles are to be found in Warmia and Mazury, Opole and Świętokrzyskie.

Among all the 16 provinces Masovian is an unquestionable leader. Its share in the total number of companies amounts to almost 19% and the number of vehicles - more than 20%. Meanwhile, the shares of such provinces as Opole, Warmia and Mazury and Świętokrzyskie, vary from 2.1% to 2.6% with regards to

the companies and from about 2.0% to 2.7% for vehicles.

This very similar spatial distribution of the number of companies and vehicles results from small fluctuations in the average number of vehicles per company in each of the regions in relation to the national average -5.7.

The analysis of the spatial distribution of companies and vehicles on domestic market of road transport carried out in the same period, proved that the voivodeship rank in this case is very similar to the one presenting international traffic. Regions with the highest number of both businesses and vehicles are: Masovia, Silesia, and Greater Poland. The smallest number of companies and vehicles can be found in regions such as Opole, Lubusz and Podlaskie. Masovia is the region with the largest share in the number of companies and vehicles, amounting to almost 17% of the total.

The diversity of regions in terms of their enterprises and vehicles quantity, both in international and domestic transport, are determined by many factors, such as area of regions, their population, economic situation, degree of urbanization, existing infrastructure or environmental fees and means of transport.

III. TRAFFIC VOLUME IN ROAD TRANSPORTATION SYSTEM

The increase in the number of transportation companies and their vehicles affects the level and quality of all carriages performed by the carriers in terms of the number of tons (the exact data have been presented in the Table 4, in the form of a detailed division into 2 types of groups, that is international and domestic transport in the years 2005-2011). The presented values are based on the research of Central Statistical Office of Poland (GUS).

In the period of conducted research the overall volume of traffic has increased by 1.5 times. In 2005, international services being one of the volume's components, had its share at a low level of approximately 6%, which had later increased to nearly 11% in 2011. On the other hand, the significance of domestic transport at the very same time was much more higher and ranged from about 94% to 89%.

The rate of growth of international transport was particularly high, that is almost 2.8. Undoubtedly, the statistics show the growing number of companies in this very group, proving them to act as some kind of demand stimulator for international transportation services and also reveals its potential for development.

The analysis of overall cargo transported emphasizes the role of commercial cargo, whose share, according to data given, fluctuated from 92% to about 94% in international transport, and from 62% to 59% in domestic transport. This ratio is at a reasonable level as it would not be acceptable if the share of own-account

transport operations in international transport volume accounted for more than a few percent of share only.

When it comes to commercial cargo and its share in domestic transportation services it came up to approximately 60% in 2011, indicating a relatively large share of the economic transport. This phenomenon may be disturbing, especially if we realize that, according to the statistics given, about 40% of this type of traffic does not generate direct revenues for companies.

A different ratio of shares can be observed with regards to the volume of transport services performed by the two groups (that is international transport and domestic transport) where in 2005 the two of them presented the values of 46% and 54%, while in 2011, a growth could be observed, with the values at the level of 57% and 43%. This is due to the significant difference in the average transportation distance between domestic and international transportation, that is 832km in 2011 and 76 km in 2005 respectively.

The shares of the international commercial transportation are defined by a special unit of goods transport measure called the ton-kilometer. The unit helps to estimate the values of shares in relation to the number of tons transported. Therefore, in domestic transport the shares of commercial cargo ranged from 70% to a maximum of 73% and they were higher than the corresponding shares in transportation services. This means a drop in own-account transportation services in the overall transport volume, as the average transportation distance by this mean of transport in 2011 amounted to 52 km and was smaller than in cargo transport with the distance of 92km.

The volume of traffic as well as transport performance of companies employing more than 9 people are given in Table 5. In this case, it is easy to notice that domestic transport represents a relatively high share in the overall cargo transport (in tons), as it oscillates between the 68% to 62%.

When it comes to the transportation performance, the situation is different as the leading position is taken by the international services with their shares oscillating at a level of 81%, as of 2010 data.

According to the comparison presented in Tables 4 and 5, transportation activities performed by companies employing over 9 people were approximately 54% of all services performed in international traffic in 2011, while the corresponding values of domestic transport were only 11%. This traffic survey presents a disturbing phenomenon, as it means that only a little bit more than half of the overall international transport of goods was performed by firms classified as big companies. What is more, the domestic transport of goods was performed by companies with over 9 employees.

The number of ton-kilometers in international transport in 2011 was recorded at the level of 65% by the 'bigger' companies, whereas in domestic market the

value was 23%, however, in 2005, the numbers were respectively 64% and 16% as a result of higher average transport distances in 2011 for 'bigger' companies (that is international transport - 1015 km and 168 km – domestic transport) compared to the average data based on the research conducted on the representative group (respectively 832 km and 76 km).

The dynamics of international road transport and the volume of tons transferred, according to conducted research, was at the level of 2.70 in the period of 2005-2011, whereas in the companies employing over 9 people the rate was 2.41. What is more, the growth rates for the number of companies in the researched years amounted to about 2.0, while 2.04 for the number of vehicles.

Transportation activity indicators, according to conducted survey were at the level of 2.32, while the very same indicators were at a level of 2.36 with regards to 'bigger' companies with more personnel. The conclusion is that, the total capacity of the vehicles and their distance travelled have increased, as the number of tons and ton-kilometers are higher than an increment in the number of means of transport used.

The characteristics of domestic transport, on the other hand, is as follows: the companies number rate – 1, 42, while vehicle rate – 1, 64 in 2005 and 2011 respectively. This means that an increase in the amount of vehicles did not trigger a direct increase of tons transported as well as the distance travelled.

An interesting contribution can be made to the characteristics of the Polish road transportation system by adding an analysis of the number of companies followed by their transport volumes.

By virtue of the Freedom of Economic Activity Act of 2nd July 2004 (Journal of Laws No. 173, item. 1807, with amendments) the companies were defined in accordance with their size (Art. 104-106), where the main criteria are the number of employed and the annual turnover.

The authors, based on direct interviews and surveys (concerning e.g. the number of employees and drivers), pursuant to the aforementioned Act made a suggestion that micro companies employing up to 10 people should be represented with 4 vehicles, while

carriers with over 50 employees should be fitted with 30 vehicles. This brings us to a conclusion that Table 5 presents transport services of the companies having more than 4 vehicles.

Based on data obtained from the BOTM, a conclusion can be made that, in 2005 almost 66.12% of overall firms accounted for international companies, that according to definition belong to the group of micro companies, possessing no more than 4 vehicles.

Therefore, in 2005 about 34% of the companies (in comparison to 66% of micro enterprises) are those that have more than 4 vehicles (that is, more than 9 employees) and performed the transportation services of 31.70 million tons (Table 5). Other transportation activity of 52.55 million tons (according to a sample survey), or about 21 million tons were carried out by micro companies.

In 2011, companies with up to 4 vehicles in international traffic accounted for almost 69% of all enterprises and transported 65.21 million tons (the difference in total volume of international traffic, according to survey carried out on a representative group, being 141.67 million tons, that is reduced by 76.46 million tons in enterprises employing above 9 people). Therefore, 'bigger' enterprises, that is with over 4 vehicles and 9 employees accounted for about 31% of total and performed transportation services of 76.46 million tons.

Unfortunately, such a system is not too beneficial, especially that the share of international transport companies (classified as "micro") does not seem to get reduced, but even increases, however, in the same time the volume of goods transported has increased.

There are no data on the number of companies and vehicles in the domestic transport detailed enough to have them grouped according to the accepted categories. You can, however, with the help of the research conducted and based on the authors' knowledge, come to a conclusion that the share of micro companies in this case was even higher than in international transport. The average number of vehicles in domestic transport companies amounted to 3 in 2011.

Table 4 : Transport of goods by road in total, according to international and domestic survey

Description	Years		
	2005	2010	2011
Transport in mln tons			
Total	863,4	1216,08	1322,24
dynamics 2005 r =1,00	1,00	1,41	1,53
of which:			
International transport	52,55	143,57	141,67
share in % of total	6,09	11,81	10,71
dynamics 2005 r =1,00	1,00	2,73	2,70
of which:			
commercial transport	48,40	134,59	133,79
share in international transport %	92,10	93,75	94,44

dynamics 2005 r = 1,00	1,00	2,78	2,76
domestic transport	810,85	1072,51	1180,57
share in % Total	93,91	88,19	89,29
dynamics 2005 r = 1,00	1,00	1,32	1,46
of which:			
commercial transport	513,02	632,78	702,49
share in domestic transport %	63,27	59,00	59,50
dynamics 2005 r = 1,00	1,00	1,23	1,37
Transportation activity in mld ton-km			
Total:	111,83	202,31	207,65
dynamics 2005 r = 1,00	1,00	1,81	1,86
of which:			
international transport	50,89	120,09	117,92
share in % of total	45,51	59,36	56,79
dynamics 2005 r = 1,00	1,00	2,36	2,32
of which:			
commercial transport	48,19	114,68	113,46
share in international transport %	94,69	95,50	96,22
dynamics 2005 r = 1,00	1,00	2,38	2,35
domestic transport	60,94	82,22	89,73
share in % of total	54,49	40,64	43,21
dynamics 2005 r = 1,00	1,00	1,35	1,47
of which:			
commercial transport	44,56	58,29	64,80
share in domestic transport %	73,12	70,90	72,22
dynamics 2005 r = 1,00	1,00	1,31	1,45
Average transport distance in km			
Total	130	166	157
international transport	968	836	832
domestic transport	75	77	76

Source: own calculations based on "Transport - results of operations" in 2005-2011, CSO, Warsaw.

Table 5 : Transport of goods by road in total, international and domestic companies employing more than 9 people

Description	Lata		
	2005	2010	2011
Transport in mln tons			
Total	101,99	173,48	202,37
dynamics 2005 r = 1,00	1,00	1,70	1,98
of which:			
international transport	31,70	71,22	76,46
share in % of total	31,08	41,05	37,78
dynamics 2005 r = 1,00	1,00	2,25	2,41
domestic transport	70,29	102,26	125,91
share in % of total	68,92	58,95	62,22
dynamics 2005 r = 1,00	1,00	1,45	1,79
Transportation activity in mld ton-km			
	42,75	93,92	98,71
dynamics 2005 r = 1,00	1,00	2,20	2,31
of which:			
international transport	32,82	75,92	77,59
share in % of Total	76,77	80,83	78,60
dynamics 2005 r = 1,00	1,00	2,31	2,36
domestic transport	9,93	18,00	21,12
share in % of Total	23,23	19,17	21,40
dynamics 2005 r = 1,00	1,00	1,81	2,13
Average transport distance in km			
Total	419	541	488
	1035	1066	1015
domestic transport	141	176	168

Source: own calculations based on "Transport - results of operations" in 2005-2011, CSO, Warsaw.

IV. POLISH ROAD TRANSPORT IN THE EU COMMUNITY

Polish road transportation system is perceived mostly by its rank on the EU market. Table 6 presents transport volumes in the years 1995 to 2010 for Polish, five selected EU countries and the aggregated data for the "old" and "new" EU members. Graphical illustration is given in Figure 3.

According to the statement of selectively chosen number of ton-kilometers performed in total of transportation services (Table 6) in the years 1995 to 2010, the share of this type of transport activity is very diverse. For example, the lowest is in Germany, and the highest in Spain.

Table 6 : Transportation activity in road transport of cargo* in selected EU countries in the years 1995 - 2010

Country	Years			
	1995	2000	2005	2010
France	178,20	204,00	205,30	182,20
billion tkm				
dynamics 1995 = 1,00	1,00	1,14	1,15	1,02
share in % of land transport**)	76,50	76,00	80,50	82,20
Spain	101,60	148,70	233,20	210,10
billion tkm				
dynamics 1995 = 1,00	1,00	1,46	2,30	2,07
share in % of land transport	90,30	92,80	95,20	95,80
Germany	237,80	280,70	310,10	313,10
billion tkm				
dynamics 1995 = 1,00	1,00	1,18	1,30	1,32
share in % of land transport	63,90	66,10	66,00	64,80
Great Britain	161,50	165,60	164,50	146,70
billion tkm				
dynamics 1995 = 1,00	1,00	1,03	1,02	0,91
share in % of land transport	92,30	90,00	88,00	88,75
Italy	174,40	184,70	211,80	175,70
billion tkm				
dynamics 1995 = 1,00	1,00	1,06	1,21	1,01
share in % of land transport	88,20	89,00	90,30	90,40
Poland	51,20	75,00	111,80	202,31
billion tkm				
dynamics 2000 = 1,00	1,00	1,46	2,18	3,95
share in % of land transport	42,60	56,90	69,00	80,58
UE - 25 ***)	1287,00	1495,40	1763,30	1745,61
billion tkm				
dynamics 2000 = 1,00	1,00	1,16	1,37	1,36
share in % of land transport	72,20	74,50	76,90	76,46
UE - 15	1127,50	1318,40	1476,10	1333,40
billion tkm				
dynamics 1995 = 1,00	1,00	1,17	1,31	1,18
share in % of land transport	76,60	77,60	79,30	77,92
UE - 10 ***)	149,00	176,97	287,20	412,21
billion tkm				
dynamics 2000 = 1,00	1,00	1,19	1,93	2,77
share in % of land transport	44,00	57,40	66,60	72,08

*) According to a sample survey of 2004

***) Land transport includes: transport by rail, road and inland waterway transport

****) Without Cyprus and Malta

Source: own calculations based on DG TREN "Energy & Transport in Figures" - 2006 and Eurostat 2011

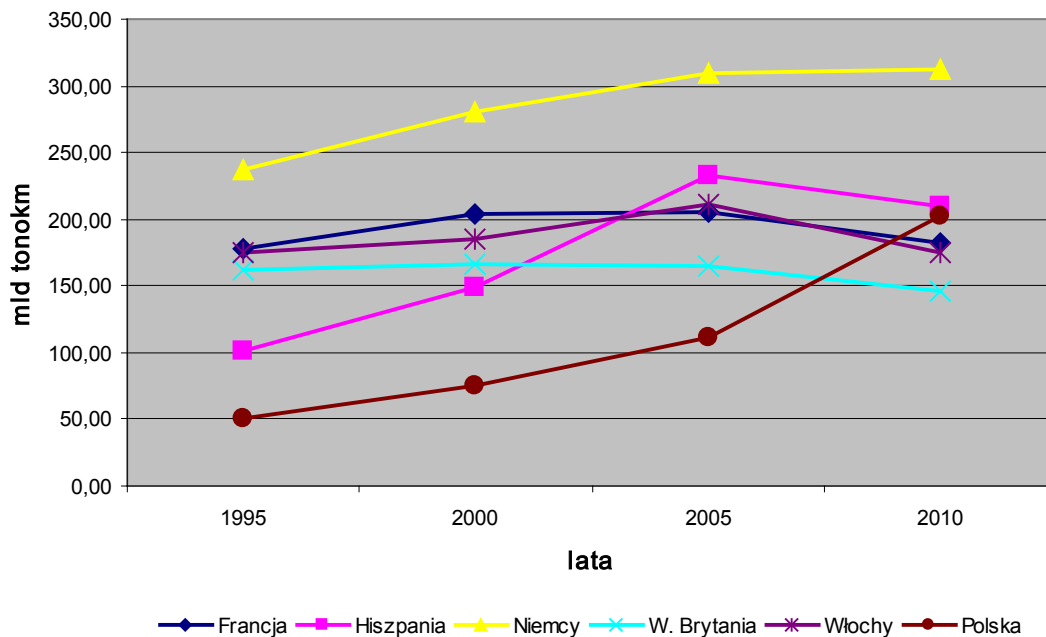


Figure 3 : Transportation activity in road transport of cargo*in selected EU countries in the years 1995 - 2010

Polish transport recorded the highest growth rate of almost 4.0. The increase in transport activity of EU-25, however, was caused by the growth of overall ratio of ton-kilometers in the group of 'new' UE-10 countries, as compared to 'the old' UE-15.

Table 7, below, summarizes the overall volume of transportation activity performed in international transport, presented in the same manner as data of the ton-kilometers above.

Table 7 : Transportation activity in the international traffic of commercial cargo in selected EU countries in the years 1995 – 2010

Country	Years			
	1995	2000	2005	2010
France	42,90	40,80	28,00	17,90
dynamics 1995 = 1,00	1,00	0,95	0,65	0,42
share in % of total road transport	24,00	20,00	13,60	9,84
Spain	22,90	41,80	66,80	63,90
dynamics 1995 = 1,00	1,00	1,83	2,92	2,79
share in % of total road transport	22,50	14,90	28,60	30,43
Germany	36,50	54,20	72,50	60,60
dynamics 1995 = 1,00	1,00	1,48	1,99	1,66
share in % of total road transport	15,30	19,30	23,40	19,36
Great Britain	14,80	15,30	10,10	8,90
dynamics 1995 = 1,00	1,00	1,03	0,68	0,60
share in % of total road transport	9,20	9,20	6,30	6,07
Italy	24,10	26,40	40,20	26,50
dynamics 1995 = 1,00	1,00	1,10	1,67	1,10
share in % of total road transport	13,80	14,30	19,00	15,07
Poland	•	27,00	50,90	120,09
dynamics 2000 = 1,00	•	1,00	1,89	4,45
share in % of total road transport	•	36,00	45,50	59,36
UE - 25 **)	•	429,90	564,70	574,09
dynamics 2000 = 1,00	•	1,00	1,31	1,34
share in % of total road transport	•	28,10	30,50	32,89
UE – 15	268,30	339,50	381,60	302,10
dynamics 1995 = 1,00	1,00	1,27	1,42	1,13
share in % of total road transport	23,50	25,50	26,00	22,66
UE - 10 **)	•	90,37	183,10	271,99

dynamics 2000 = 1,00	•	1,00	2,03	3,01
share in % of total road transport	•	48,90	57,70	65,98

*) According to a sample survey of 2004

***) Excluding Cyprus and Malta

Source: own calculations based on DG TREN "Energy & Transport in Figures" - 2006 and 2006 and Eurostat Eurostat 2011.

In the "old EU" group the share of international transport in 2010 had decreased compared to 2005, except for Spain, where the share had increased slightly. The highest growth rate was recorded in Spain, where international transport increased by almost three times in 2010 in relation to 1995. On the other hand, the countries of so called "new Union", that is the EU - 10 presented a significant share of international transport in the overall transport by road, that is 66% of share and 3 times higher growth in the past ten years. These high values of international transport of EU-10 countries affected the rest of EU members resulting in an increment of the same indicator, by an increase to 33% in 2010, compared to 23% recorded by the EU – 15 in 2010, which shows a decrease compared to the previous years of the researched period.

Poland, against the background of presented countries, occupies the leading position due to the volume of transportation activity it performs, that is 120 billion tkm in 2010, which accounted for almost 21% of overall transport across the EU and the dynamics established in 2000, whose rates were at a level of about 4.5. During the researched period, the share of ton-kilometers performed in international traffic oscillated at the level of more than 59% of overall transport by road, that is relatively more compared to the countries mentioned.

In a special report issued by Eurostat at the end of 2010, being a detailed summary of the passing year, Polish transport had been referred to as developing and therefore leaving a positive impression and perspectives for further growth and advancement in the future. This has been achieved thanks to the trend of gradually increasing transportation activity along with significant growth rate of international transport of Poland.

Furthermore, throughout the years Poland has finally earned its position in the group of road transportation leaders of EU countries and started to be perceived, along with a few countries only, as the one that efficiently opposed economic crisis. When it comes to numbers and figures, it is worth mentioning that Poland has been in the top countries with regards to the volume of ton-kilometers since 2005 already. Last year, Poland was found on the second place, right behind Germany (with 207.65 million tkm Poland, Germany 323.83).

However, those who are professionally involved in transportation sector as well as the experts on transportation services are trying to make a point that excessive enthusiasm is not an option. They also warn

against taking this favorable for Poland trend for granted, since nothing is ever certain. It shall not be forgotten that Poland gained its strong position due to its strong competitive skills and determination to succeed. However, nowadays, even this advantage of Polish transport may be subject to change. Polish market, as well as the others, is unsafe and will definitely need to defend its position against competition from the East. It is expected that eastern financial and infrastructural background may start to play more and more important role in the transportation system of the future.

In summary, the road transportation market in Poland has been subject to significant changes both in terms of quality and quantity over the recent years. What is more, this trend is expressed in the number of companies operating in this market as well as their financial results. According to statistics shown in one of Polish national daily newspapers Rzeczpospolita: there is a reason to believe the upcoming years will allow the current condition of Polish transportation system to be maintained, but it will particularly apply to companies with their fleet over 50 vehicles as well as large logistics operators.

Furthermore, the authors' observation brings us to a conclusion that, although at a very small pace, the market is heading toward the process of concentration. More often, we can become witnesses of the phenomenon of mutual collaboration between small companies and big enterprises in terms of vehicles and overall activities. Last but not least, it must be admitted that over the years Polish road transport has increased its value. We have become a strong and equal partner among other countries that can be found on the EU transportation market. However, it should be noted that the position of Polish carriers, known as the "kings of Europe" should not be treated as a fixed dogma. Just the opposite. Being the king of Europe requires a lot of hard work and engagement. Not only is it essential to pay attention to the qualitative side of transportation system but above all the economic efficiency. Therefore, Poland should be more flexible and prepared for any changes in the condition of EU economy that may occur and thus ready for any structural changes that may be needed, even if they require significant expenses.



The Most Powerful Mouse in the World: The Globalization of the Disney Brand

By Michaela Robbins & Fritz. G. Polite

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Abstract- A company's brand may be one of the most important marketing tools in order to have a successful product. Research and academic interest in branding has greatly increased due to the impact branding can have on a product (Hudson & Hudson, 2006). As defined by Wood (2000), brand equity is the "measure of the strength of consumers' attachment to a brand and the description of the association and beliefs the consumer has about the brand". A brand can elicit emotions, memories, and a connection between the product and the consumer (Hudson & Hudson, 2006). Brands should be regarded as valuable, long-term corporate assets due to their importance in promoting one's product (Wood, 2000). Global brands have an even larger impact worldwide. Globalization and branding are both a growing and expanding part of business ventures. As globalization has accelerated, the importance of positive branding has become crucial to having a competitive product globally (Hsieh, 2002). The Disney Company is at the forefront of globalized entertainment branding. In order to understand the process and importance behind globalization and branding, this study will explore the development of the Disney Company and its brand. The purpose of this study is to examine the history behind the Disney Company to better understand what has enabled them to create such positive brand equity on a global scale. To accomplish this purpose, this paper will investigate important research as it relates to branding, marketing, and globalization. Historical, descriptive, and narrative facets were employed in conjunction with discussion of the literature reviews. Also, this project will explore important facets of the Disney Company in order to better elucidate and understand what has enabled their corporation to develop such a strong positive global brand. Most of the information in this paper will come from refereed journal articles and the Disney website. Through an interesting study on the Disney Company, this research illuminates the growing importance of positive branding and globalization in an ever-changing global economy.

Keywords: *brand, brand equity, globalization, leadership.*

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Michaela Robbins ^α & Fritz. G. Polite ^σ

Abstract- A company's brand may be one of the most important marketing tools in order to have a successful product. Research and academic interest in branding has greatly increased due to the impact branding can have on a product (Hudson & Hudson, 2006). As defined by Wood (2000), brand equity is the "measure of the strength of consumers' attachment to a brand and the description of the association and beliefs the consumer has about the brand". A brand can elicit emotions, memories, and a connection between the product and the consumer (Hudson & Hudson, 2006). Brands should be regarded as valuable, long-term corporate assets due to their importance in promoting one's product (Wood, 2000). Global brands have an even larger impact worldwide. Globalization and branding are both a growing and expanding part of business ventures. As globalization has accelerated, the importance of positive branding has become crucial to having a competitive product globally (Hsieh, 2002). The Disney Company is at the forefront of globalized entertainment branding. In order to understand the process and importance behind globalization and branding, this study will explore the development of the Disney Company and its brand. The purpose of this study is to examine the *history behind the Disney Company to better understand* what has enabled them to create such positive brand equity on a global scale. *To accomplish this purpose*, this paper will investigate important research as it relates to branding, marketing, and globalization. Historical, descriptive, and narrative facets were employed in conjunction with discussion of the literature reviews. Also, this project will explore important facets of the Disney Company in order to better elucidate and understand what has enabled their corporation to develop such a strong positive global brand. Most of the information in this paper will come from refereed journal articles and the Disney website. Through an interesting study on the Disney Company, this research illuminates the growing importance of positive branding and globalization in an ever-changing global economy.

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I. INTRODUCTION

The purpose of this research is to further illuminate past research as well as conducting a meta-analysis of articles related to the Disney Company. This paper utilized the research format that Martinez, Stinson, Kang & Jubenville (2010) utilized to analyze the Disney Company through cross referencing previous literature on branding, globalization, and leadership in

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relationship to the Disney company. The initial steps accomplished through the examination and defining of branding illuminates how the Disney brand has enabled such success for Disney within the tourism and entertainment industry. Research involving branding, brand equity, corporate culture, and corporate image were analyzed to gain further knowledge on the Disney Company's success. The second stage involved the examination of the constructs of globalization and how the Disney Company has developed into one of the most global entities in all of business. Research on the expansion of Disney Theme Parks, movies, and merchandise in foreign markets and the reaction and success in those markets was further expanded upon to attempt to generate new knowledge of the concepts of globalization as it relates to the Disney Company. Its established brand equity and positive equity value is critical within this analysis. Lastly, the discussion of leadership was included to attempt to develop and expand on past scholarship conducted on the Disney Company's prowess and success. Utilizing a meta-analysis cross-referencing format, patterns, consistencies, and connections between the articles were exposed. This should further assist in the analysis and interpretation of the Disney Company, along with identifying key strands of globalization and brand equity.

II. SIGNIFICANCE OF THE STUDY

Furthering and advancing knowledge about the Disney Company's success through branding, globalization, and leadership will significantly enhance the field of study. This study will connect literature regarding the Disney Company and highlight consistent patterns of past literature. Making connections between the literatures will provide greater knowledge and insight. Understanding the success of the Disney Company can enable future businesses and business owners to attempt to emulate the same strategies within their own companies. This could help create more successful and global companies, which in turn could help the international and domestic economies.

III. DEFINITION OF TERMS

Brand- stimulus in the mind of the consumer that should create trust (Berry, 2000)

Brand Equity- "measure of the strength of consumers' attachment to a brand and the description of the

association and beliefs the consumer has about the brand" (Wood, 2000)

Vertical Extension- expanding by creating new products under the same brand name in a different given area (Kim & Chhajer, 2001)

Disneyization- "a process by which the principles of the Disney theme parks dominate more and more sectors of society" (Bryman, 1999)

Globalization- "a trend towards increased economic and political interdependence, which at once fosters and is fostered by cultural homogenization." (Hochschild, 2006)

Leadership- the process of influencing members of a group in order to attain goals (Loughead, Hardy, & Eys, 2006)

Formal Leader- an individual who was prescribed their position by the organization (Loughead, Hardy, & Eys, 2006)

Informal Leader- leader that emerges as a result of the interactions among group members (Loughead, Hardy, & Eys, 2006)

IV. INTRODUCTION TO THE DISNEY COMPANY

The Disney Company has been a premier entertainment company for over ninety years. The early beginnings started October 16, 1926, Walt Disney signed a contract with M.J. Winkler thus establishing the Disney Company, which was at the time known as The Disney Brothers Studio. The company rapidly began to expand and in the years to come has grown exponentially. In November 1928, the first Steamboat Willie cartoon was created, introducing the world to Mickey and Minnie Mouse. The cartoon established the image that the Disney Company now relies on for the majority of its branding. The following decade Disney stepped into the movie realm with the first full length animated film, Snow White and the Seven Dwarfs. A few years later, in 1940 Disney issued its first stock, signifying its growth as a company. The Disney Company began to expand beyond the world of television and written entertainment with the opening of a theme park. July 17, 1955 was the opening day for Disneyland, the first Disney theme park in Anaheim, California. Just 11 years later, the greatest inspiration and leader behind the Disney Company, Walt Disney, died on December 15, 1966. Despite the loss of the great visionary behind the company, Disney continued to grow in the years to come. Just five years later, in 1971, Walt Disney World Resort opened in Orlando, Florida (Disney History).

The Disney Company was growing in giant proportions within the US, therefore in the 80's they began to expand internationally. They opened their first international Disney theme park, Tokyo Disneyland, in

1983. Later that decade, they agreed to build Euro Disneyland, later renamed Disneyland Paris, further expanding their global presence. Also in 1983 the Disney Channel began programming 18 hours of broadcasting a day. The 1990's were a time of unprecedented growth in the Disney Company. They began to expand their influence across many areas through purchasing companies and sports teams. In 1992 Euro Disneyland was opened to the public. In 1995 they purchased ABC and a portion of the California Angels Major League Baseball team, which they totally acquired in 1999. Disney, in keeping up with the latest technological trends, created its first website in 1996. That same year they also continued expansion through the creation of their own radio network, Radio Disney. Disney launched the Entertainment Sports Programming Network (ESPN) magazine in the late nineties and opened their Wide World of Sports Complex, increasing their audience to include sports fans. In 1998, Disney launched the first ship in their cruise line in a further attempt to grow within the industry of tourism. Throughout the nineties the Disney Company expanded more than Walt Disney ever imagined. The precedent set in the 90's was expanded with further growth in the 2000's. In 2001, Disney acquired the Fox family channel and renamed it ABC Family. They also acquired the rights to the Muppets and Bear in the Big Blue House. In 2005 Disney continued its global expansion with the opening of Hong Kong Disneyland. In the 2000's Disney acquired many prestigious brands and companies. In 2006, Disney acquired Pixar Animation Studios and then Marvel Entertainment in 2009. Most recently in 2012, Disney completed its acquisition of Lucasfilm Ltd. LLC and gained the rights to the legendary Star Wars Franchise. From the humble beginnings of a cartoon studio in the 20's to an international business giant today, the Disney Company continues to grow and change on a daily basis to provide quality entertainment around the world for all members of the family (Disney History).

Through its great expansion and growth as a company, Disney has divided its company into five main business segments. These consist of media networks, parks and resorts, studio entertainment, consumer products and interactive media. The media network division of Disney is comprised of broadcast, cable, radio, publishing and digital businesses within the two main subsets of Disney/ABC and ESPN Inc. Walt Disney Parks and Resorts division has grown into one of the world's leading providers for family vacations. The parks and resorts division includes 11 theme parks and 43 resorts across the globe, Disney's cruise line with its four ships, and Adventures by Disney, which is guided family vacations of locations around the world. The Walt Disney Studios segment has been the foundation of the company for over 85 years. The studio is in charge of bringing the world quality family movies, music, and

stage plays. Feature Films are released through many different ways under the umbrella of Disney, including Disney, Pixar, Marvel Studios, Dream works, and Touchstone Pictures. The Disney music group includes Walt Disney Records and Hollywood Records. The business section of Disney is in the Disney Consumer Products, which range from selling apparel, toys, home décor, books and magazines to foods and beverages, stationary, electronics, and fine art. The main retail chain, The Disney Store, is located in North America, Europe, and Japan. The most recently founded segment in 2008, Disney Interactive, pushes the boundaries of technology and imagination to entertain children and families around the world. Disney Interactive uses a variety of ways to do this, through mobile, social, and console games, online virtual worlds, and top ranked web destinations. Together all five of these segments create the global corporation that Disney has become today. Even more significant is the source of customer value creation. Brand impact shifts from product to company as service plays a greater role in determining customer value (Berry and Parasuraman 1991).

V. LITERATURE REVIEW

a) *Branding: Definition and Explanation*

Building a company's brand is an important aspect of a company's success, whether it is in goods or services. A brand should increase a customer's trust towards the company they are purchasing from. Especially in the world of service, where there is no tangible product, the importance of a positive brand is key. If a company trusts the brand, they will feel less monetary or social risk in purchasing or using the product.

There are many components that establish a company's brand. It is a compilation of what the company says it is, what people think it is, and the experience the customers have from the company. First, the presented brand is what the company displays in its advertisements, such as its logo, company name, and any slogans that accompany them. These are created to establish brand awareness, which bonds a persons' feelings and emotions to a particular product. Second, the external brand communications refers to the things that are exchanged about a company through people's discussions, what we refer to as word of mouth. In an ever-changing world of technology, an increasingly important area of external communications is online through discussion boards and online reviews. Third, the brand meaning includes the main feelings and experiences that people have had with the company. This involves what comes to mind when you first mention a company. The brand meaning people develop from experiencing a company's product is by far the most important component in developing a brand. No matter how positive a company's marketing

and branding may be, if the service the customer experiences is disappointing that is what will stick with them rather than the advertising and marketing techniques that the company employs (Berry, 2000). This is the challenge for marketers, to ensure that customers have the right experiences that positively influence the brand that they have advertised (Hoeffler & Keller, 2002). All of these things also help to develop a brand's equity. Brand equity refers to the value that one company has over another because of their brand name. It includes the marketing advantage one company would hold over another simply because of their brand name (Berry, 2000).

Companies are increasingly using corporate social marketing (CSM) in order to help develop their brand. CSM involves linking your brand with a company or cause that helps others. Companies use CSM to build very strong emotional connections with their customers in order to set their company apart from the competition. An important aspect of this is to understand the profile of the customers that use your product. In understanding customer profiles, companies can understand what links customers to their company and their products and can use those connections to better choose what cause to support. Another important aspect is establishing brand credibility, in order to accomplish this a company's brand needs to be perceived as credible in three dimensions: expertise, trustworthiness, and likability. If companies can prove to have positive credibility in those three areas their brand credibility and equity will increase dramatically. Through CSM, a brand can also elicit feelings towards how people are viewed socially when using the product. If the customer feels that others react positively to the use of the product, or personally, if using the product gives the customer some self-satisfaction and respect for themselves. By partnering with companies that help those in need or through donating money to research, companies can establish their brands in the minds of their customers in a positive light. Companies must also ensure that their customers are aware and knowledgeable on the cause that their company has partnered with. This marketing strategy can help both the company selling the product or service, and the nonprofit organization or cause that they have partnered with (Hoeffler & Keller, 2002).

Another way a company can expand its brand is through vertical extension. This involves expanding by creating new products under the same brand name in a different given area. This can include offering the same product but with different improvements. This is most easily seen in the car industry. A basic vehicle costs much less than the same vehicle with a sunroof, heated seats, and navigation included. It typically involves using the original product the company is used for but in a new way. Another example, Rice Krispies cereal is the main ingredient used to make rice krispy treats, so

Kellogg decided to sell readymade rice crispy treats through vertical extension. Vertical extension is becoming increasingly popular, but can have negative effects. If the product has too many similarities to the original or too many differences from the original product people may not value the products or the brand as much. Understanding the feelings and value that the product brings to the customer is key when using vertical product extension (Kim & Chhaged, 2001).

b) *Branding of The Disney Company*

The Disney Company has developed a brand with such positive equity that it has become a premiere leader in the family entertainment industry. Disney has cultivated a brand of high customer service with family values relating to goodness, kindness, and innocence for children (Brockus, 2004). The Disney Company is one of the top two media conglomerates, Time Warner being the other (Tracy, 1999). Some suggest that Disney's success exists in its ability to speak to both children and adults. The Disney Company speaks to children by constructing and reliving elements of lived experiences, while providing adults with nostalgic fantasies about the past (Carson, 2004). Disney's "corporate image" is one of the ideal American institution (Forman, 1998). Disney participates in corporate social marketing (CSM) through its partnerships with the Make-A-Wish Foundation, Boys and Girls Clubs, UNICEF, and others (Company Overview). This helps to create more positive brand equity for the Disney Company through connection with charities that support children. Disney's brand is one that is constant but always evolving.

Disney has even created its own brand of management, known as "Goofy Management" (Middaugh, Grissom & Satkowski, 2008). Disney now markets its philosophy, beliefs, and values to other companies who wish to be successful in the workplace. The public can most easily see this applied through Disney's theme parks. At the theme parks, Disney pays great attention to detail, entertainment, and customer service. The four main components that make up Disney's service standards, also known as "The Disney Way," are safety, courtesy, show, and efficiency. Another very important aspect of the corporate culture at Disney is treating the guests like royalty. They teach their employees to "walk the talk" so that the employees can take pride in the excellence of the parks and their work that makes it so. One of the most important pieces of the Disney Way is the belief that "everyone makes a difference" and everyone is important. "Goofy Management" works in other workplaces as proved through Middaugh, Grissom, and Satkowski (2008) showing an example of the Disney Model being used in Hospital settings. Arkansas Children's Hospital, University of Chicago Hospitals, and Woman & Infants Hospital of Rhode Island all used the Disney Model and all increased

employee productivity, satisfaction and loyalty. This further shows that the values and corporate culture of the Disney Company create a brand with positive equity for not only the consumer but for the employees as well.

One way that Disney uses its brand name is through cultivation and creation of many of America's cultural objects. Disney generated over 50% of its revenue in 1996 from films and product licensing. A majority of this comes from "the licensing agreements that Disney makes with manufacturers for its intellectual property and images licensed from specific films". Disney's leap into merchandise can be considered a form of vertical extension. This is vertical extension because it represents a move into a new area with the same brand or logo. The company, originally a cartoon studio, now makes a large percentage of its revenue through the sale of merchandise. Disney uses its merchandise to further advertise for its films. The films, in turn, stimulate a demand for merchandise with the film's images. This creates a circular rotation that proves to be very beneficial for Disney. Disney uses all forms of merchandise including books, jewelry, toys, clothes, and almost anything that you can put an insignia on to generate more revenue (Tracy, 1999). Today Disney can be considered a cultural machine, creating new products and cycling through old ones in order to maintain a consumer base including generations young and old. Disney's success in this streams from the fact that Disney holds a strategic grasp on key cultural objects, including the characters we all know and love, and the means by which to upkeep and promote them. Disney's marketing of their products also provides great assistance in creating and maintaining cultural objects. Disney uses each holiday and season as a way to present themed merchandise of the Disney characters that alter but do not change the core subject. This entices consumers who enjoy particular characters or who is a collector to buy a whole new toy every season or holiday. Disney also created the "Disney Vault" in which they place the Disney classics and re-release them in increments with new behind the scenes footage, better film clarity, and on the newest technology. This encourages consumers to buy films that they may already own over and over again so that they can have the most up to date version. Disney's marketing system's greatest strength lies in the ability to build customers from the bottom up, retain them for generations, and encourages ever-greater investment (Brockus, 2004).

Some scholars even suggest that the Disney brand and culture are beginning to overtake and spill into other aspects of American life. This is what can be referred to as "Disneyization." As explained by Alan Bryman (1999), "Disneyization is depicted as a process by which the principles of the Disney theme parks dominate more and more sectors of society." According to Bryman (1999), Disneyization consists of four

aspects: theming, dedifferentiation of consumption, merchandising, and emotional labour. Theming, perhaps the most obvious example of Disneyization, is where areas have a specific theme. Today we have themed restaurants, hotels, hotel rooms, shopping malls, and even airports. The second aspect, dedifferentiation of consumption refers to the lines between different forms of consumption are becoming blurred. In the case of Disney this can be seen through the amount of merchandise and food that is sold through the theme parks. Malls today have begun to do the exact opposite; they are starting to build theme parks within their walls to keep customers there longer in order to make more money. Las Vegas is one of the best examples of dedifferentiation of consumption due to the casinos and theme parks that are attached to all of the hotels. The third aspect, merchandising, refers to the promotion of goods with company logos and images. This ties into the previously mentioned notion of Disney's success through merchandise and licensing. Through the concept of Disneyization we now see restaurant chains, such as The Hard Rock Café, creating their own line of merchandise. Another example of this is through sports, almost every sport team now has their own line of merchandise that can be purchased through the team or the local university where they compete. The fourth and final aspect is emotional labour; this refers to the requirement of the employees to have a certain emotional demeanor about them the entire time they are at work. In Disney theme parks employees are required to portray the impression that they are having so much fun too, that they are really not even working. This idea has spread and is now emphasized in a number of management texts because of the success the Disney Company has had with it, which brings back the concept of "Goofy Management" being spread throughout several different workplaces. The concept of Disneyization takes the idea of branding to a whole new level. This concept takes the Disney brand and claims that it has become so powerful that its influence is spreading into areas that we do not readily notice (Bryman, 1999).

c) *Globalization: Definition and Explanation*

Globalization is a term that is very hard to define. It is loosely characterized as "a trend towards increased economic and political interdependence, which at once fosters and is fostered by cultural homogenization." Globalization is a form of change that involves many factors including economic, legal, technological, political, and cultural. It is the product of both individual and corporate agents increasing the international infusion throughout many aspects of life. Some scholars see globalization as "a confirmation of freedom and a reason to continue expanding freedom." Globalization also has its criticisms often for being shortsighted, greedy and centered around building

empires. On the other side, it is protested against international trade organizations. Globalization consists of several cliché's such as the world is getting smaller, suggesting not that the world is shrinking but rather that everything is becoming more familiar. This makes it not only easier to travel but also to not return home. Globalization also increases the amount of ideas, technology, people, and capital that are transferred from one country to another. This can be considered both positive and negative; it is negative in that it implies a loss of tradition, individualism, and culture. The entire world starts to become more secular. The positive of globalization is the increased freedom in all areas of life, due to life not being dictated by the local or national norm. As globalization increases it also increases the ability to adapt and transform in times of change. This positive can also be seen as a negative. For example, throughout time children have been taken care of by their parents and when grown the same children take care of their elderly parents. Through the changes associated with globalization children are more often being sent to day cares and elderly are being sent to nursing homes or assisted living homes. This has evolved through the importance we place on work and competition, which has increased because of globalization. Political and economic entities have begun to take over the basic local social functions that were once done by individuals. This gives the larger economic and political forces great power over individuals because individuals are now depending on them for their basic needs. This also gives those forces the ability to manipulate individuals because of their power over them (Hochschild, 2006). Individuals are affected by globalization on a daily basis whether or not we are aware of it. The speed with which technology is allowing integration creates great wealth for some and great poverty for others. Globalization is often times also referred to as Americanization due to the expansion of American companies such as Coke, Disney, CNN, McDonalds, and others. Globalization it is occurring at all times through the Internet, satellites, and other types of technology. It is clear that globalization is supported and detracted by many in our respective cultures. If tamed, globalization can increase efficiency and be a force of positive change socially (Evans, 2002).

d) *Globalization of The Disney Company*

The Disney Company has become a globalized company, starting its global expansion in Toyko. In the 1990's Disney started a European initiative, which included the establishment of a European headquarters in France. Disney also expanded in Europe with its theme parks and the establishment of Euro Disney. Euro Disney was opened in April of 1992 about twenty miles outside of Paris, France. The establishment of Euro Disney created much turmoil from the French press. This turmoil was created because, unlike other compa-

nies who expand globally, Disney changed little to nothing when entering the international market. The French place great value on their language and culture, and due to this the press made the Disney venture out to be one of American cultural imperialism. The French feared that Disney characters would soon overtake the French literary masterpiece characters in the mind of French citizens. Disney made very minor changes upon building Euro Disney, the main language at the park was French and the Disney tales that were based on European fairy tales would have more prominence in the park. Otherwise, few changes were made and the French press felt that Disney's whole point and purpose was to glorify America. They claimed the whole message portrayed at the parks was the glorification of America's past, power, way of life, and it's future. This form of globalization links with Americanization: that American companies and culture are starting to take over the globe (Forman, 1998).

The site on which Disney decided to build Euro Disney also created much turmoil. Marne-la-Vallée was the small town on which the park was built. The park destroyed the region, some protested that it caused them to lose their livelihood, and caused the breakup of French pastoral setting that was in place before Disney's arrival. Disney's arrival also caused many of the surrounding towns to increase to 2/3 Disney employees. Another complaint made by the French press was that many of the procedures for employment were not changed to accommodate French culture. The mandates on personal hygiene and conduct, the expectations of the company, and the dress code all are at odds with the typical employment practices of the French. The French press also made the training process out to be one of "suffering through four days of indoctrination at Disney University." This Anti-American sentiment that is often shared by the French can be linked to the fear that their national identity can be threatened by America's economic, cultural, and political dominance. Disney's entrance into France represented a sort of onslaught of American culture and values that took up a physical place, space and presence on French soil. The French press created a very negative image of Euro Disney through odd cultural analyses of Disney and dramatized personal testimonies. They did not tell any of the positive stories that included the number of jobs that would be brought to the area and the France-based Disney Park that would attract consumers from all over Europe. Despite the negative image constructed by the French press, Euro Disney was and always has been very successful. Euro Disney has over one million visitors a month, in fact, the French are the largest consumers of Disney products in all of Europe. The decision made by Disney to keep its American ways proved to be a successful one in Europe and in its future expansion (Forman, 1998).

Similarly, Disney brought its global theme parks to Hong Kong and retained its American themes. Through retaining the American culture within the walls of the theme park it allows people from mainland China a chance to engage in global consumption and a sense of international travel that would normally be prevented by their state. When Disney was in negotiations with the government of Hong Kong, the government "suggested that Chinese culture could be incorporated into the park but Disney argued that visitors should have an authentic Disney experience." Disney saw the Hong Kong park as a chance to give locals a sample of an American park that would make them want to travel to America to see the real ones. Disney recognizes that the locals want an experience untainted by their own culture. Disney built the park as a smaller Disneyland just located in Hong Kong. Similarly to the initial reactions in France, the press of Hong Kong highly criticized Disney's decision to build in Hong Kong. They criticized the small scale of the park and questioned whether or not the partnership between Disney and the government was a sound one. Yet, the park was and still is successful and enjoyed by many visitors. When people from mainland China travel to Hong Kong Disneyland, they receive a global experience without going overseas. This allows them to experience a very different, free, and individualist atmosphere in contrast to the repressive state in which they live (Fung & Lee, 2009).

Another method in which the Disney Company participates in globalization is through the global division of labor. Disney is highly criticized for taking advantage of international labor to increase its profits (Tracy, 1999). How Disney does this is through subcontracting practices that take advantage of human labor in developing countries. The phrase "division of labor" comes from the fact that the mental work is completely separate from the physical work, resulting in decreased wages for those doing the physical labor. They, mostly women, have no say in the products that they manufacture, are poorly compensated, and lack the ability to control their work environment. The Disney Company therefore does all of the intellectual conception and planning then subcontracts the physical labor to developing countries where they can take advantage of lower wages to increase profit. This relationship can be seen as an example of economic imperialism because the industrialized nations have all of the power and control in this relationship. In some cases, the developing countries welcome this business. In places like Indonesia and China, they have conditioned their women to be subservient to men and to do what they are told at all times. These international practices that Disney partakes in greatly contrasts their domestic practices. In the United States, Disney has earned a reputation as a socially liberal company that includes all types of people with good will towards all employees.

Internationally, the reality is far less flattering. In comparison of products produced in industrialized nations versus dependent nations, the dependent nations average annual wages per worker are almost \$30,000 less than in industrialized nations. Tracy points out, "while Disney does not directly negotiate the subcontracts discussed, it licenses the rights to use its intellectual property to contractors at such high prices that they must seek the least expensive subcontractors to manufacture these products." The power of the Disney Company is tremendous, Disney controls a large amount of popular culture and through this it influences our daily lives. As the economy becomes increasingly globalized, more and more industries are partaking in the division of labor. Disney is therefore a step ahead and will only continue to rely on workers in developing countries despite the negative impact it could have on the Disney brand (Tracy, 1999).

Through all three of these examples, we see the power that Disney has in the global economy and the influence it has internationally. Disney is often met with great criticism when participating in global ventures, yet it remains successful and profitable. We may not all agree on the practices by which Disney makes its profit, but one cannot deny the influential global power that Disney has become.

e) *Leadership: Definitions*

Longhead, Hardy, and Eys (2006) conducted a study on leadership within teams in order to attempt to examine how the roles of formal and informal leaders impact the team they are on. Leadership is defined in many ways, but overall it is a process that involves influencing members of a group to achieve goals. Within leadership there can be formal and informal leaders. A formal leader is someone who was given the position by the organization. Simply because someone is given a formal title it does not ensure that their leadership will be effective. This is often where informal leaders emerge. Informal leaders are born out of interactions that occur between the team members. Leaders can occupy several various roles within a team, this is known as differentiation. As a part of differentiation, a leader may be considered a combination of task leader, social leader, and external leader. Task leaders help the team to keep focused, helps to clarify responsibilities, assists in making decisions, and offers instruction when needed. A social leader contributes to the team harmony, ensures everyone is included and involved, helps solve interpersonal conflicts, and offers support and trust to teammates. External leaders promote the team from within the community, represent the team's interests in meetings, attempt to secure resources for team, and buffer team members from outside distractions. Being able to work in more than one area helps to make more effective leaders through differentiation. In the business world, informal leaders play an important role in leading

groups even when there is a formal leader (Loughead, Hardy & Eys, 2006).

f) *The Disney Company: Worldwide Example of Leadership*

According to The Walt Disney Company website, Disney was most recently named America's Most Reputable Company. Disney earned this through citizenship efforts, amazing business performance, world-class theme park experiences, and innovative storytelling. The Disney Company strives to win over the hearts of America and through its continuous protection of its very positive brand it has clearly done so. This is just one example of the leadership position that The Disney Company has taken over in the world of entertainment and business. If we look back at the definition of leadership, it is the ability to motivate others to achieve a set of goals (Loughead, Hardy & Eys, 2006). It is clear through many of the previously discussed articles that Disney has the ability to motivate others. Through its fair employment practices and large network of employees, Disney maintains its brand and positive equity. Because of this, many other businesses outside of the entertainment world have started to model themselves after The Disney Company (Middaugh, Grissom & Satkowski, 2008). In this setting we see The Disney Company taking a more informal leadership role because they have not been formally given a title that allows them to push their practices on other businesses. Instead, Disney has created a positive reputation through interactions with businesses and consumers and has positioned itself in such a way that other companies go to Disney for management and other business related advice and leadership (Middaugh, Grissom & Satkowski, 2008). The Disney Company has also set itself apart as a company with the powerful ability to lead by differentiation. The Disney Company holds many different roles within its business and has managed to become a leader in all of them (Company Overview). Differentiation consists of task leadership, social leadership, and external leadership (Middaugh, Grissom & Satkowski, 2008). First, The Disney Company exhibits task leadership in each business segment through the top and middle level managers who make sure that all employees know which tasks they must accomplish. Second, The Disney Company exhibits social leadership through the experience that Disney creates for each customer. This is especially true in the Parks and Resorts Segment of The Disney Company. Lastly, Disney exhibits external leadership through its branding. Disney has created a positive brand equity that follows its products out into the world. Disney's external leadership can also be tied into its philanthropic associations and in giving back to the community (Company Overview). Through The Disney Company's ability to lead by differentiation, it is evident that all together these leadership components have made

Disney the worldwide business leader that they are today.

VI. METHODOLOGY

The methodology used for this paper is based off of the meta-analysis format conducted by Martinez, Stinson, Kang & Jubenville (2010). The initial research for journal articles relevant to this subject was conducted utilizing available Internet-based research databases through The University of Tennessee's libraries databases including: EBSCO Electronic Journal Service and

Academic Search Premier as well as the google scholar search engine. Among key terms included were combinations of brand, globalization, leadership, brand equity, marketing, culture, and The Disney Company. Articles published from 1998 to 2010 were included in this selection process. The initial search resulted in more than 23 relevant articles. In analyzing the 23 articles, six were eliminated due to their inability to fit within the framework of the other relevant articles. A summary table of the included studies is included below.

Study	Year	Journal	Content	Commonalities Related to Disney Co.
Berry	2000	Journal of the Academy of Marketing Science	Importance of branding for company's providing a service and not a good	Disney is a service company that understands the importance of positive branding.
Brockus	2004	POPULAR COMMUNICATION	Disney's grasp on America's cultural objects	Disney uses its control of cultural objects to make profit and ensure future generations of fans.
Bryman	1999	The Editorial Board of The Sociological Review	Concept of Disneyization: Disney brand flowing into other aspects of life	The Disney Company/brand has become so successful that its practices are overflowing into other business.
Carson	2004	Ethnomusicology Forum	Use of music within Disney Theme Parks	Includes aspects of branding, globalization, and Disneyization.
Evans	2002	Primary Health Care Research and Development	Globalization positives and negatives	Controversies of globalization and expansion of American companies (Disneyization).
Forman	1998	Technical Communication Quarterly	Controversial establishment of Euro Disney	Disney's first global amusement park, positives and negatives.
Fung & Lee	2009	Continuum: Journal of Media & Cultural Studies	Disney's lack of change while entering Hong Kong	Localization and globalization of Disney theme parks, many connections to Forman (1998)
Hochschild	2006	The Intercollegiate Review	Definition of globalization in modern and ancient context	Changes of the world because of globalization, Disney's ability to keep up.
Hoeffler & Keller	2002	Journal of Public Policy & Marketing	Using CSM to improve brand equity	Linking brand to philanthropic organizations, Disney's ties to make-a-wish foundation and others.
Hsieh	2002	Journal of International Marketing	Perception of brands in international/global setting	Importance of Disney's global branding and how it remains positive
Hudson & Hudson	2006	Journal of Marketing Management	Convergence of branding and entertainment	Importance of studies conducted on branding and Disney's understanding of this importance
Kim & Chhaged	2001	The Journal of Product Innovation Management	Discussion of vertical product extension	Disney expanding products from just cartoons and films to every product imaginable.

Loughead, Hardy & Eys	2006	Journal of Sport Behavior	Definition of informal and formal leaders in context of athletics	Disney employing the characteristics of a leader as a whole company.
Middaugh, Grissom & Satkowski	2008	MEDSURG Nursing	Applying Disney's style of management to other workplaces	Disney's brand and global impact has made it an example for other businesses to follow.
Tracy	1999	Journal of Communication Inquiry	Global division of labor, Disney exploiting workers	Negative outlook on The Disney Company's international dealings.
Wood	2000	Management Decision	Definition of brand and brand equity	Understanding definition of brand to better understand Disney's prowess.

Figure : 1

VII. CONCLUSION

This cross-referencing of articles on the globalization and branding of The Disney Company has helped elucidate what makes Mickey Mouse the most powerful mouse in the world. This paper has helped to shed light on the growing importance of positive branding and expanding the globalization of that brand in a constantly changing world. In understanding the importance that Disney places on the creation, marketing, and protection of their brand it is clear that this is one of the techniques that sets The Disney Company apart from others. In learning about Disney's historic ventures into the global economy it is clear that globalization is a key component to the success of the company and that it is not always a pretty or easy task entering into the global environment. The most important connection between every article included in this paper is the importance of branding and creating positive brand equity through all parts of the business. Disney is a master at this practice and has become such an innovative leader that their practices are employed in all types of companies now. From this research, understanding the importance and the history behind The Disney Company's success can influence and guide other companies to employ these same strategies. Overall, the findings associated with this research provides insight, knowledge and contributions that can be used to improve any and all businesses through gaining a better understanding of the globalization of the Disney brand and the process of attaining positive brand equity.

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Islamic Tourism: In the Perspective of Bangladesh

By Syeda Tamanna Fahim & Evana Nusrat Dooty

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Abstract- Islamic tourism is a new tourism destination in the world today. Through this tourism, religious duty was performed as well as knowledge achieved for wider dimension. By this way muslim can ensure satisfaction of Almighty Allah. The study reveals that there are huge opportunities to develop Islamic tourism in Bangladesh as it has a lot of natural beauties, Islamic heritage, cultural and archeological heritage, historic heritage, which might be potential tourism destinations. Various organizations including Organization of Islamic Conference can play vital role in this regard. The study also identifies problems in developing Islamic tourism in Bangladesh. And herewith we have provided some measures to develop this new trend of tourism to accelerate economic growth in our country.

Keywords: tourism, islamic tourism, bangladesh.

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Islamic Tourism: In the Perspective of Bangladesh

Syeda Tamanna Fahim^α & Evana Nusrat Dooty^σ

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I. INTRODUCTION

Islam is considered a comprehensive way of life as its teachings cover, directly or indirectly, every possible affairs of human life. The Quran in many different ways issued special attention to tourism and in its attitude toward tourism considered one of the great blessings of Allah. According to the holy text of the Quran, Muslims should travel in order to fully appreciate the beauty of Allah's world and also visit their friends and relatives. They have a responsibility to provide hospitality to visitors who, under Islamic law, enjoy the citizens' rights. Tourism is traditionally closely linked to religion which has acted as a powerful motive for traveling. Religious buildings, rituals, festivals and religious events are important tourist attractions for those are the followers of the particular systems of belief represented (Henderson, 2003).

Tourism is one of the promising sectors of Bangladesh. Tourism industry effects positively on the Bangladesh economy for increasing foreign exchange earnings, and employment opportunities. The direct contribution of Travel & Tourism to GDP in 2012 was BDT193.0bn (2.1% of GDP). It is forecast to rise by 6.8% pa to BDT819.4bn by 2023 (4.7% of GDP). Travel & Tourism generated 1,281,500 jobs directly in 2012 (1.8% of total employment). By 2023, Travel & Tourism will account for 1,785,000 jobs directly, an increase of 2.9%

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pa over the next ten years. (World Travel and Tourism Council-2013)

The Organization of Islamic Conference (OIC) have emphasized for developing the tourism activities in the member countries. The Islamic Development Bank (IDB), expressed support for tourism in accordance with the Shariah. The bank has allocated fund for tourism development in Muslim countries in this connection. As Bangladesh is second largest muslim country of the world it has a strong potential to develop Islamic tourism. This study is designed to explore the concept of Islamic tourism. And also to find out prospects for developing islamic tourism in Bangladesh in order to get the satisfaction of Allah and attract more tourists.

II. RATIONALE OF THE STUDY

In Islam, traveling is considered as worship (*'Ibadah*). Because it is enjoined in order to perform one of the pillars of Islam, namely '*Hajj*' during certain months, and '*Umrah*' to the House of Allah is prescribed throughout the year. Secondly, in the Islamic worldview, travel is also connected to knowledge and learning. The greatest journeys were undertaken at the beginning of Islam with the aim of seeking and spreading knowledge. For example one of the *Taabi'een* said concerning the verse in which Allah says:

"(The believers whose lives Allah has purchased are) those who turn to Allah in repentance (from polytheism and hypocrisy), who worship (Him), who praise (Him), who fast (or go out in Allah's Cause), who bow down (in prayer), who prostrate themselves (in prayer), who enjoin (on people) Al Ma'roof and forbid (people) from Al Munkar, and who observe the limits set by Allah. And give glad tidings to the believers" [Al-Tawbah 9:112].

Thirdly, the aim of travel in Islam is to learn lessons and receive reminders. The command to travel about in the land appears in several places in the Qur'an. Allah says:

"Say (O Muhammad): Travel in the land and see what was the end of those who rejected truth" [Al-An'aam 6:11]. Allah also says:

"Say to them (O Muhammad): "Travel in the land and see how has been the end of the Mujrimoon (criminals, those who denied Allah's Messengers and disobeyed Allah)" [Al-Naml 27:69].

Fourthly, May be the greatest aim of travel in Islam is to call people to Allah and to convey to mankind

the light that was revealed to our Prophet (sm). This is the mission of the Messengers and Prophets and their companions after them (may Allah be pleased with them). The companions of our Prophet Muhammad (sm) spread throughout the world, teaching the people goodness and calling them to the message of truth. We hope that the concept of travel today will try to achieve the same great aims. Finally, travel in Islam also includes travelling to ponder the wonders of Allah's creation and to enjoy the beauty of this great universe, so that it will make the human soul develop strong faith in the oneness of Allah and will help one to fulfill the obligations of life. Relaxation is essential to enable one to strive hard after that. Allah says:

"Say: Travel in the land and see how (Allah) originated the creation, and then Allah will bring forth the creation of the Hereafter (i.e. resurrection after death). Verily, Allah is Able to do all things" [Al-'Ankaboot 29:20].

Not only for spiritual gain, but traveling is also important for physical gain. Offering religious and historic places to international tourists may earn more revenue to the Muslim country. Moreover, The Organization of Islamic Conference (OIC) have emphasized for developing the tourism activities in the member countries. Greater travel by Muslims within the Islamic world could lead to better understanding, stimulate collaboration and serve the common good. Our study aims to formulate suggestions in favor of Islamic tourism for developing tourism sector of Bangladesh.

III. OBJECTIVES OF THE STUDY

1. To explore tourism from Islamic perspective ;
2. To provide some recommendations to develop Islamic tourism in Bangladesh.

IV. RESEARCH METHODOLOGY

This is a descriptive study. Data was accumulated from relevant books, articles, newspapers, action plans of the Government and also from all related authority like Bangladesh Parjatan Corporation, World Tourism and Traveling Council 2013, Bangladesh Economic Review. All data obtained from secondary sources are analyzed and finally a conclusion along with some recommendations is drawn.

V. DISCUSSION

a) *Tourism*

Tourism is a complex phenomenon and it is a challenging task to offer a succinct definition of this concept (Goeldner and Ritchie, 2006, 12). Tourism is a tool that can be said by which people in leisure time job stress and patterns of everyday life at home status and experience new places, to gain the psychological benefits (Homayoun, 26:2005). According to the World Tourism Organization (WTO), "Tourism comprises the

activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited." (Medlik, 2003).

Tourism is a complicated concept that covers a wide range of social, behavioral, economic, political, cultural, and environmental considerations. The concept of tourism consists of a set of activities, services, and benefits which all give tourists particular experiences (Medic and Middleton, 1973). Buhalis believes that a tourism destination has five essential elements: attractions, access, facilities, activities, and tourism-related side services (Buhalis, 2000, 98). Tourism is a leisure activity which involves a discretionary use of time and money and recreation is often the main purpose for participation in tourism (Ghosh, 2001).

b) *Exploring Islamic Tourism*

i. *Definition*

Tourism is traditionally closely linked to religion which has acted as a powerful motive for traveling. Religious buildings, rituals, festivals and religious events are important tourist attractions for those are the followers of the particular systems of belief represented (Henderson, 2003). Islamic tourism is a new tourism destination in the world today. There are 54 Muslim countries in the world. Most of the countries situated in an important nerve point of the world. Due to the geographical and economic importance of Muslim countries, the scope of Islamic tourism increases day by day.

All product development and marketing efforts designed for and directed at Muslims. Motivations are not always or entirely religious. Participants could be pursuing similar leisure experiences to non-Muslims, albeit within parameters set by Islam, and destinations are not necessarily locations where Shariah or full Islamic law is enacted. (Henderson 2010)

Islamic Tourism is defined as any activity, event, experience or indulgence, undertaken in a state of travel that is Islamically compliant, with the purpose to interface within an Islamic framework, with one or all of the following; history, arts, culture, heritage, way of life, economy, health, education and any other human interests (ITC, Malaysia)

In Islamic tourism, the visitors have traveled in a place for the satisfaction of Allah and their recreation. Tourism is a part of life and not contradictory with the fundamental theme of Islam.

Traditionally, Islamic Tourism is associated with religious activities such as hajj and umrah. As the years passed, it developed to a much larger dimension as people go beyond exploring other Islamic destinations. This new dimension has led to the need for all the other components in tourism such as the food industry, the airlines or transportation industry and many others, to

make adjustments so as to fulfill the needs of this unique segment.

ii. *Features of Islamic tourism*

“Travel through the earth and see how Allah did originate creation; so will Allah produce a later creation: for Allah has power over all things.” (Al-‘Ankaboot 29:20)

In the human world which is characterized by ethnic-cultural diversity: to demonstrate unity in cultural diversity. A Quranic verse on ethnic-cultural diversity reads:

“And among His signs is the creation of the heavens and the earth, and the variations in your languages and your colors; verily in that are signs for those who know.” (Ar-Rum 30:22)

Another verse reads:

“O mankind! We created you from a single (pair) of a male and a female, and made you into nations and tribes, that you may know each other. Verily the most honored of you in the sight of Allah is (he who is) the most righteous of you. And Allah has full knowledge and is well acquainted (with all things).” (Al-Hujurat 49:13)

Islamic *Sharee’ah* has brought a number of rulings that regulate travel and tourism, so that it will achieve the aims mentioned above and will not overstep the mark or become a source of evil and harm in society.

These rulings include the following:

- a. It is haraam to travel for the purpose of venerating a specific place, except the three mosques. It was narrated from Abu Hurairah (may Allah be pleased with him) that the Prophet (peace and blessings of Allah be upon him) said: “No journey should be undertaken to visit any mosque but three: al-Masjid al-Haraam, the Mosque of the Messenger (peace and blessings of Allah be upon him) and the Mosque of al-Aqsa.” Narrated by al-Bukhari (1132) and Muslim (1397). It is even more haraam to travel to visit places that are regarded as holy in other religions, such as those who go to visit the Vatican or Buddhist idols and so on.
- b. The evidence also indicates that it is haraam for the Muslim to travel in kafir lands in general, because of the evils that will affect the Muslim’s religious commitment and attitude as the result of mixing with those nations who pay no attention to religion and morals, especially when there is no need for him to travel for medical treatment or business and so on, rather it is just for leisure and for fun. Allah has made the Muslim lands spacious, praise be to Allah, and He has placed therein wonders of creation so that there is no need to visit the kafirs in their lands.
- c. There can be no doubt that *sharee’ah* forbids tourism in places of corruption, where alcohol is drunk and immoral actions take place and sins are

committed. The Muslim is enjoined to keep away from sin so he should not commit sin or sit with those who are committing sin.

iii. *Islamic tourism as business activity*

In Islamic literature, a general term for “religiously acceptable” is Halal and it usually refers to consumption and utilization of material things for Muslims (Diyanet Isleri Baskanligi, 2011). The way to utilize and consume all the blessings is mubah and termed halal in Islam (Gulen, 2011). In other words, consumption and utilization of things that are not forbidden by the Holy Qur’an and the Hadith (sayings and deeds of Prophet Muhammed (PBH)) are halal in Islam (Gulen, 2011). The opposite of the term is haram and it denotes unacceptable consumption and utilization of things. A muslim is therefore expected to benefit from halal things and abstain from the haram.

iv. *Islamic tourism is an alternative to conventional tourism*

- a. Avoidance of religiously prohibited (*haraam*) products and services in the tourist packages; in other words, observance of the *halal* requirement such as in the hospitality and entertainment products and services
- b. Offering non-tangible, qualitative ingredients or contents in the tourist package, especially as defined in spiritual-moral terms
- c. Offering opportunities for vastly improved cultural literacy, for learning other perspectives on the inner meaning of tourism, especially the understanding of pleasure, vacation and recreation as the primary objectives of tourism
- d. Islamic tourism is not just about visiting holy places, mosques, shrines and tombs, and other popular religious sites that are limited to the history of Islam
- e. Objects of sight-seeing or touristic sights such as the pre-Islamic historical sites and the natural wonders targeted by conventional eco-tourism may be included and indeed projected as part of Islamic tourism provided that the Islamic perspectives on eco-tourism and the pre-Islamic historical sites are always made clear to the tour operators and the potential tourists.

c) *Bangladesh possess a strong potential for islamic tourism*

i. *Natural beauties*

Bangladesh is country of natural beauty. It is a country filled with hills, valleys, forests, beaches, lakes and rivers. The Sundarbans (large and small rivers, forest ecology, wild life, beaches, culture, plants, mammals (Royal Bengal Tiger, spotted Deer), Otter squirrel, Monkeys, Barking deer, wild boar, Dolphin, reptiles, fish, birds etc. Hiron points, Katka, kochikhali, Dubla Island, Mandarbari, and Putency Island etc). Miles of golden sands, towering cliffs, surfing waves, rare conch shells,

colorful pagodas, Buddhist temples and tribes, delightful sea-food--this is Cox's Bazar, the tourist capital of Bangladesh. Other special attractions of Cox's bazar are Inani beach (about 30 km from Cox's bazar full of coral stones), the island of Maheskali (famous for its Buddhist and Hindu temples and a dry fish industry), Teknaf (the southern-most point of Bangladesh), Ramu, Sonadia, Himchhari, St. Martin Island (only Coral Island) etc. The three Hilly Districts of Rangamati, Khagrachari and Bandarban are inhabited by a number of tribes, with their distinctive cultures, rituals and traditions. Chimbuk, Ruma, Rain-Khyoung valleys, keocradang and Tazinsdang are highly attractive products in the hill tracts. Sylhet, most tea granary of the country, is another attractive tourism site of the country. Kuakata beach, where both sun rise and sunset is seen, is another tourist landmark of the country. So, Bangladesh has rich and varied flora and fauna-a biological phenomenon, which simply describe as unique in the Bangladesh.

ii. *Islamic heritages*

As second largest Muslim country of the world Bangladesh possess a strong Islamic heritage. About 0.5 million people visit Bangladesh every year in the purpose of World Ejtama. The main Islamic heritage sites are- Star Mosque; Baitul Mukarram Mosque; Shait-Gumbad Mosque, Bagerhat; Chhota Sona Mosque; Mosque of Baba Adam; The Shrine of Hazrat Shah Jalal; Shrine of Sultan Bayazid Bostami; Shrine of Shah Amanat; Huseni Dalan Mosque. These places may be attractive destinations for Islamic tourism.

iii. *Archeological heritages*

Bangladesh is a country considerably rich in archaeological wealth, especially of the medieval period both during the Muslim and pre-Muslim rules. The major archeological sites are Shait-Gumbad Mosque, Bagherhat; Sonargaon; Lalbag Fort; Paharpur; Mahasthangor; Mainamati; Kantanagar Temple, Dinajpur.

iv. *Historic heritages*

Historical monuments of Bangladesh represent Hindu, Muslim, British periods and independent scattered all over the country. Major historical attractions are-Lalbagh Fort; Sonargaon; world war 2 symmetry Gandhi Asram; National Memorium, Mujibnagar Memorial, Central Sha-hid Minar, Martyred Intellectual Memorial, Old High Court Building, etc.

v. *Cultural heritages*

Bangladesh has a strong cultural heritage. The mentionable places with cultural heritage of Bangladesh are-Natore - Dighapatiya Rajbari (Uttara Ganabhaban) Shilaidaha Kuthibari, Kushtia: Sagordari, Jessore: Trishal: Shahjadpur Kuthibari: National Museum, Ahsan Manzil Museum, Dhaka.

vi. *Recreational tourism products*

Bangladesh has world's largest unbroken sea beach, thousand of rivers and rivulets, numerous lakes

and cannels which provide recreation facility like speed boat, paddle boat, normal boat, swimming, squash etc to the tourist such as angling, boating, swimming, fishing etc.

d) *Barriers in implementing islamic tourism in bangladesh*

i. *Lack of awareness among mass people about islamic tourism*

There is lacking of proper Islamic knowledge among the people of our country. For this reason Islamic tourism is still a new concept to our people.

ii. *Unavailability of proper infrastructural facilities*

Though tourism is a promising sector of Bangladesh, infrastructural facilities are not properly available in our country. And as Islamic tourism is not introduced yet, there are no infrastructural facilities to support Islamic tourism in our country.

iii. *Islamic recreational events*

Many Muslim countries like Iran, Malaysia, Saudi Arabia, and Iran gain success in Islamic tourism by implementing Islamic recreational events. But in our country such kind of events are not introduced, still.

iv. *Inadequate conservation of islamic heritages*

Bangladesh is enriched with abandon Islamic heritages that can encourage Muslim tourists to come to Bangladesh. But many of these sites are going to be dented as proper initiatives are not taken to conserve these.

v. *Limited educational and research scope on tourism*

Tourism is a researchable matter. There are huge research have been conducting all over the world on this topic. Researchers engaged to find out how tourism may be a tool for sustainable economic development. But in Bangladesh there is a little scope to research on tourism.

vi. *No international promotional activities of Islamic heritages*

Most of the tourism dominated countries adopt modern and suitable marketing strategy for developing their tourism industry. They also focus their tourism places to the tourists with market oriented ways. Due to improper marketing strategy, Islamic tourism could not focus highly among the tourists.

vii. *Less preference on eco-tourism*

Though Bangladesh is a country with great potential for developing eco-tourism, ample steps are not taken to develop eco-tourism in the country. But implementing eco tourism may be one step forward to Islamic tourism as Islam shows a great concern about environment.

e) *Recommendations*

To make the Muslim-friendly environment, our suggestions are as follows:

i. *Build up proper infrastructural facilities encouraging to Islamic tourism*

It should be ensured in tourism sites proper infrastructural facilities that promote Islamic tourism. Islamic resorts and hotels, as well as Islamic destinations will shape the tourism activities; alcohol-free accommodations in which gender-segregation and the dress code will be strictly respected and controlled; available prayer-rooms on site; and "Islamic" transportation facilities (Hamarnah & Steiner, 2004).

ii. *Arrange Islamic tourism events*

Bangladesh can arrange gender segregated sports and wellness facilities and "Islamic" entertainment programs in tourism places. Elements of this concept are already implemented by Saudi Arabia and Iran in their tourism industry.

iii. *Involvement of mass media in Islamic tourism efforts*

Media can play a crucial role to develop Islamic tourism in a country. It would be helpful for Bangladesh to promote Islamic tourism through establishing satellite channel, newspaper and other media. And by positive involvement of exiting media should be ensured.

iv. *Appropriate marketing strategy*

Bangladesh is the second largest Muslim country of the world. It should establish proper marketing strategy to attract more Muslim tourists. Bangladesh must have to develop positive image as a Muslim country to focus the Islamic tourism.

v. *Co-ordination among muslim countries*

There should be a coordinated effort among Muslim countries of the world to develop Islamic tourism. Bangladesh can arrange joint tourism packages with other Muslim countries to attract huge tourists. It can be helpful for Bangladesh to implement Islamic tourism properly as well as to ensure economic growth of the country.

vi. *Take proper ecotourism initiatives*

Bangladesh is blessed with two of the world's splendid and enchanting ecotourism spots of diverse nature- the Sundarbans and the Chittagong Hill Tracts (Wahidul, 2002). The Sundarbans is the world's largest mangrove forest and could be the goldmine for ecotourism in Bangladesh. Cox's bazar, the three Hilly Districts of Rangamati, Khagrachari and Bandarban ; Sylhet, Kuakata beach these are mentionable eco tourism spot in Bangladesh. If proper steps taken to implement eco tourism in these tourism sites, it should be compliant to Islamic tourism.

vii. *Create awareness among mass people*

Bangladesh should take proper steps to create awareness about Islamic tourism among her people. The concerned authority can arrange different programs to circulate the spirit of Islamic tourism around the country.

viii. *Proper role of OIC*

OIC is the highest platform for the Muslim countries. Bangladesh can create and maintain an international linkage with OIC to increase their tourism activities.

ix. *Implement public private partnership*

It would be helpful for Bangladesh to take advantage of public private partnership to implement Islamic tourism.

x. *Increase scope of tourism education and research*

In Bangladesh, the public educational institute is not offering tourism education. Though some private Institution is offering, the scope is very limited. So, government should take initiative to expand tourism education and also allocate proper fund for research activities in this ground.

VI. CONCLUSION

Tourism is one of the emerging industries in Bangladesh. It is a purposeful activity in Islam that aims to achieve physical, social and spiritual goals. The physical goal leads to a healthy and stress-free life, which subsequently lets Muslims to serve Allah better. Islam encourages visiting Muslim brothers, as this helps strengthen among Muslim community. The spiritual goal reinforces one's submission to Allah through the beauty and bounty of Allah's creation (Hashim *et al.*). So, the teaching of Islam influences to enhance the tourism activities in Muslim countries. Bangladesh has huge opportunities to develop Islamic tourism for economic sustainability as well as fulfill the religious spirit. Malaysia, Saudi Arabia, Iran, Turkey have successfully adopted the Islamic tourism and were able to attract more tourist effectively.

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Assessing Preparation Level of Medical Tourism in Zahedan

By Mostafa Mir & Abolfazl A. Tajzadehnamin

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Abstract- Purpose- The objective of this study is assessing preparation level of the city of Zahedan in carrying out activities concerned with medical tourism. The objective is demonstrated in the framework of assessing the status quo of medical tourism in Zahedan in four areas of “hospital Facilities/Services”, “Hotels, Food and Beverage”, “Tourism Facilities” and “Governmental Factors”.

Design/methodology/approach- The research method adopted in the study is descriptive-survey. The population of the research includes managers, medical experts from Zahedan hospitals. To attain the objectives a questionnaire was designed in four main parts of Zahedan medical tourist system based on Likert scale.

Research limitations/implications- The limitation of this paper is the needs to find the hospital and health experts that have view about tourism industry in Zahedan.

Practical implications- The main implication of this paper is for Zahedan city to do better for the health tourism management. Also this paper improves the health tourism system model in the developing countries.

Originality/value- this paper exam the systematic model for managing medical tourism in Zahedan city as tourism destination. This systematic model explores the main elements of medical tourism destination.

Findings- The results showed that Zahedan has some shortcomings in carrying out activities concerning medical tourism. The shortcomings include low costs of treatment and accommodation, having no various historical and recreational places, having no experts in treatment, endemic diseases, no serving of a diet appropriate to patients and bad attitudes among people of other towns.

Keywords: *medical tourism, medical tours, hospital experts, Zahedan.*

GJMBR-F Classification : *JEL Code: 150699*



ASSESSING PREPARATION LEVEL OF MEDICAL TOURISM IN ZAHEDAN

Strictly as per the compliance and regulations of:



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Mostafa Mir ^α & Abolfazl A. Tajzadehnamin ^σ

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1. INTRODUCTION

Tourism industry has increasing importance in modern world. Many developed and developing countries have put the industry of tourism among their economic priorities. These countries have dedicated a great share of the world market to themselves. The importance of tourism is not limited to providing job opportunities and revenues. Since 1950 tourism industry has undergone great changes so that some call it tourism revolution. These changes have led to vast and extensive tourism and in the future will turn into qualitative

tourism. Currently tourism is a great and powerful professional activity in the world in a way that it first preceded petroleum in importance, then was level with it and after that got a higher position than petroleum (Masoumi, 2006). Tourism has developed considerably during the last 50 years. Today tourism has turned into a world industry and by itself it is a great economic source (Hallmann et al, 2012). Tourism is a complex social and economic event which needs to be studied at different levels so as to be able to reach the expected development (Risteski et al, 2012). For management in the area of tourism, other than definition, an understanding of all types of tourism and their categories is very important for demands and services required by different tourists are not identical (Kazemi, 2006). Also the IT and internet serves as a new communication and distribution channel for e-travellers and suppliers of travel services and products. This new channel also enables tourism business to improve their competitiveness and performance (Law et al, 2004).

Today the countries have organized expansion of service market for the purpose of increasing their national gross income. They have found tourism the most important market with cash cycles, productive job opportunities and high profit margins. Increasing growth of international trips on the one hand and increasing interest in travel destinations on the other hand have added more suffixes and prefixes to the term of tourism such as religious tourism, sport tourism, war tourism, leisure tourism, health tourism etc. Medical tourism is considered one of the most important types of tourism. Today medical tourism has dedicated a growing part of market to itself among tourism markets (Connell, 2012). The towns of Sistan o balouchestan and particularly Zahedan can be recommended to tourists as a unique tourist destination owing to their special tourist attractions. Also having a prestigious medical university in different fields, Zahedan can be recommended for medical tourism all over the country. Surgical operations such as eye surgery and general surgeries are among cases which can make Zahedan a famous destination for medical tourism. Thus in this study we try to determine preparation level of medical tourism in Zahedan which plays a key role in successful management of medical tourism with the aid of theoretical and practical researches. At length we will offer some guidelines for improvement of this preparation. In other words we try to examine subjects and attain the

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objective of assessing preparation level of Zahedan in order to turn it into a medical tourist destination.

II. LITERATURE REVIEW

Tourism is defined and categorized based on different factors. However one of these categories is called medical tourism. Various definitions of medical tourism have been offered. In one of these definitions, medical tourism is applied to a type of travel which is done to other countries and for reception of services such as treatment, dental services and surgical operations. In another definition offered in 2005 in global analysis report of medical tourism, medical tourism is applied to any form of travel from living place to another destination in order to receive surgical services and the like. This journey must at least include one night of accommodation outside the living place (Sadrmomtaz and Agharahimi, 2010). Also medical tourism is applied to journeys to receive health care service in other countries as tourists. Nowadays medical tourism is among the most important factors concerning tourism industry that has high economic advantages and is applied to international journeys which an individual makes to receive medical services and surgical operations in order to use medical services which are less costly than his own country (Correra and Bridges, 2008).

It must be noted that one type of medical tourism is the one in which doctors, nurses and job holders in the department of treatment work voluntarily for developing countries (Edelheit, 2008). However we mean it is a type of trip that the individual takes for the purpose of health care and treatment. In spite of long waiting on the part of patients, heavy medical expenses and also obstacles to travel to other countries, patients are still inclined to travel to other countries to get themselves treated and use medical services. There are various reasons in support of medical tourism. First providing health care brings about procurement of financial income. This in turn enhances regional health care system of a country (Rerciveil et al, 2006). Since mid-1990 some factors reinforced this industry of which the following is mentioned:

1. Expansion of firms with medical tourism services (for example in Canada there are at least 15 medical tourism companies (Gorcica, 2006, Korcok, 1997). Thus in spite of long waiting lists, more people travel to other countries for medical treatment (Priest, 2007).
2. Cost reasons (for example American patients can receive medical services at 1/4 cost even in some cases 1/10 of local cost abroad. besides 40 million Americans do not have treatment insurance (Awodz and Pando, 2005).
3. Escalating rate of demands for receiving treatment is related to growth of old population and expenses

in developed countries. For example many Japanese companies send their employees to Thailand for checkups every year. Also in Canada delay in intermediary surgical operations is a serious issue and lack of access to family doctors makes treatment arduous. Thus such patients take trips to countries like Thailand and India (Turner, 2007).

4. Some patients prefer to keep their treatment especially plastic surgery, beauty and sterility secret. That is the reason why they go abroad (Ildoromi and Sefidi, 2011).

Among the most important surgeries in the world, the most attention is given to thigh and knee surgery, cardiac surgery and dental services and different types of plastic surgeries. Other types of treatment can also be put under the category of services offered in this tourism. Thus through travelling a health tourist can use treatment services of other countries in order to gain his well-being. Currently more than 50 countries are known to use medical tourism as a national industry for gaining profits (Gahlinger, 2008). There is no exact information as to the number of patients receiving health services at medical tourist destinations. The main problem in determining the number of medical tourists is related to exact definition of these tourists. In fact the reported figures include treatment of foreigners staying in target country, traders and tourists needing health services during accommodation. Also the number of those using Ayurveda and health services such as yoga, massage etc. may be added to this list. In spite of these shortcomings, it is evident that a considerable number of patients participate in the process of medical tourism (Delgoshuae et al, 2012).

To gain a better understanding of the status of medical tourist market, Caballero and Muomba (2007) have shown essential and selective information concerning this type of tourist market. They argued about what we need to pay attention to different factors besides medical status and current potentials of hospitals in order to reach medical tourism. These factors including: Consumer benefits, branding, social issues, operators, legal framework, communication channel, infrastructure, product and target market.

To gain success in the area of medical tourism we must pay attention to other factors besides the ones mentioned above. Since the concept of "destination" is a basic concept in organization, medical tourism needs to be studied in an organized framework. In tourism the concept of destination can be applied to a country, region, city or state which is in pursuit of enhancing its unique attractions and also improving its image so as to be competitive among other purposes of tourism (Hallmann et al, 2012).

Despite great advances in modern technology, producing safe food and keeping it safe remains a

worldwide public health problem with illness caused by the consumption of contaminated food described as the most widespread health problem in the contemporary world. Available data indicate that:

- most causes of such illness are of biological origin;
- the majority of these are caused by micro-organisms;
- that mishandling of food at some stage along the food chain is often responsible; and
- food businesses within the hospitality industry are implicated in a disproportionate number of outbreaks,

The implementation and management of safe food handling procedures is, therefore, of crucial importance to both industry and consumers (Taylor, 2008), especially in Health Tourism.

III. RESEARCH HYPOTHESES

1. The status of Zahedan in terms of facilities and medical services is appropriate for the use of health tourists.
2. Zahedan's tourism in terms of accommodation, food and drink is appropriate for the use of health tourists.
3. The status of Zahedan in terms of services and facilities of tourism and infrastructure is appropriate for the use of tourists.
4. Regional factors affecting Zahedan's tourism are in good condition.

IV. THE RESEARCH MODEL

The model utilized in this study has an organized framework which is known as medical tourism system and is mentioned in Gyuko's (2011) studies. In his model (figure 1) he has divided medical tourism into 2 parts. The first part includes destination of medical tourism to which a tourist travels to receive medical services. The second part includes the starting point of a tourist which is his living place. The relationship between the two destinations is formed through coming and going of medical tourists. In this relationship marketing plays a key role. In this system a tourist or the person travelling for medical services has the main role for if this type of tourist did not exist, other parts would lose their meaning. In this model in the tourist's starting point (living place) there are 6 types of patients as follows: patients with heavy surgeries, patients with minor surgeries, plastic surgery, diagnostic surgery, substitution behaviors and patients having special lifestyles. Other than patients, there are also other sections in this area: employees in treatment section, insurance companies, and travel agencies conducting health tours and arranging trips. In the other section of the model which is a tourist -inviting region or a medical tourist destination there are 4 main parts besides travel

agencies: hospital services and facilities, and regional and state factors. In this study only destination is examined and the model and its parts are examined in Zahedan. Since travel agencies in Zahedan have a weak role in the organization of patients' trips, they are eliminated.

Hospital services and facilities show the capacity of the destination to offer medical services and things like medical expenses at destination, accessibility to expert doctors, necessary hospital equipment and the like. Accommodation part includes hotels and their facilities for the use of patients. The main factor in this part is existence of types of food suitable for patients and facilities like bathroom and elevators in hotels of medical tourism destinations. Target tourism services and facilities are infrastructures of destination. Cases like historical and cultural attractions, recreational facilities and good image of destination are included. Regional factors include features of a medical tourist destination and cases like the rate of hospitality by native people, observing the rights of guests and cultural differences between guest and host (Guyko, 2011). Also The Hotel and lodging industry has been competing on guest satisfaction and such competition has become more intense in recent decades (Oh & Jeong, 2010).

V. APPENDIX 1

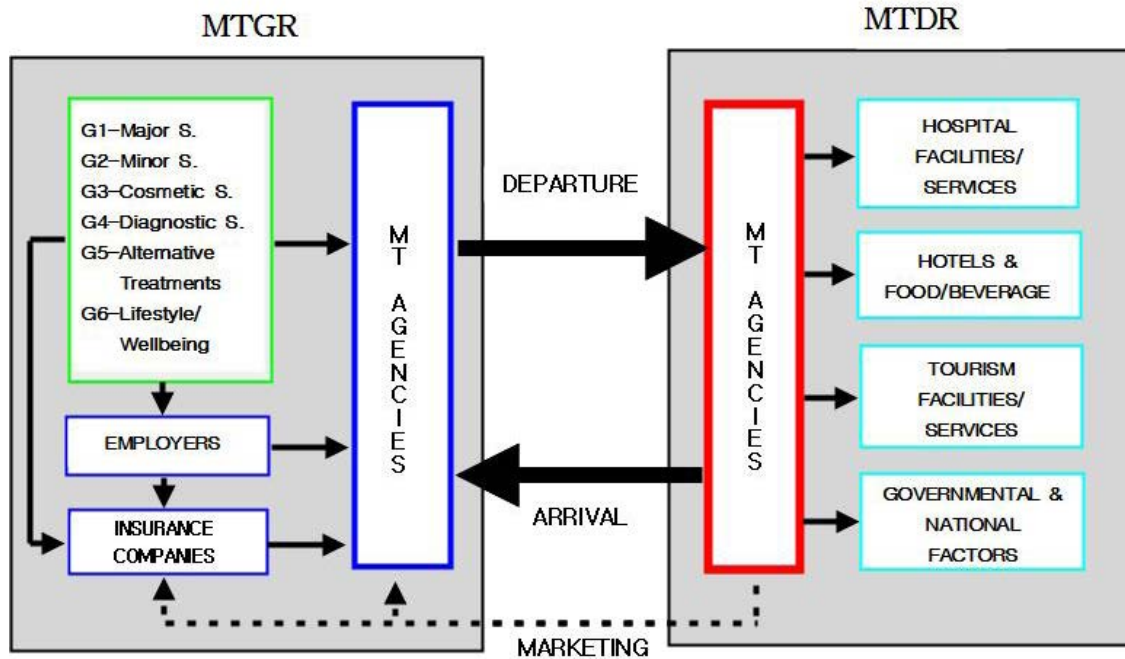


Figure 1 : Medical Tourism System Model

Source: GyuKo, Medical Tourism System Model, International Journal of Tourism Sciences, Volume 11, 2011

VI. RESEARCH METHODOLOGY

The current research is “applied research” and data gathering is based on “survey” method. The population of the research constitutes hospital experts and treatment section of medical university of Zahedan. Experts are chosen from hospitals of Khatam al anbia, Ali ibnAbitaleb, Baharan hospital, ophthalmology of Alzahra and Boali hospital. These experts are acquainted with subjects of health tourism. Regarding clarity of research subject in Zahedan and limitations of the expected population to comment on the subject, the snowball method was employed in sampling. A number of 110 questionnaires were issued to eligible people and 102 ones were received and became the criterion for conclusion. In order to gather research literature field studies were employed through issue of questionnaires and to measure research hypotheses the Likert scale test was utilized. In the questionnaire options from 1 to 6 are related to measuring variable of hospital services and facilities, options from 7 to 12 are related to the variable of accommodation, food and drink, options from 13 to 18 are related to the variable of civil and tourism services and facilities and options from 19 to 24 are related to the variable of regional factors. To measure validity, a questionnaire with the method of content validity and corroboration of experts was used. To measure reliability, a number of 35 questionnaires in the form of a primary sample were issued. The coeffi-

cient of Cronbach’s Alpha equals 0.80 which indicates reliability of the questionnaire.

VII. ANALYSIS

The researcher has employed descriptive and deductive statistics to analyze data. Descriptive statistics include the frequency of Likert scale options, median, mean, standard deviation of research variables. In deductive statistics the researcher has employed the Friedman test to examine importance of the research variables.

a) 1.6 Descriptive analysis of factors of research variables

The results obtained from descriptive analysis of research data which includes frequency of dedicated codes to Likert scale of each question, median and mean for each variable is as follows:

VIII. RESULT

a) Variable of "medical facilities and services"

Regarding the values shown in table no.1, participants had the most agreement in survey with questions 1, 3 and 4, the medians of which are 3.96, 5.17 and 4.20 respectively. The most disagreement was with questions 2,5 and 6, the medians of which are 3.30, 3.47 and 2.61 respectively. It is worth noting that closeness of mean and median of data shows normal distribution of data.

b) *The variable of "hotels, food and beverage"*

Regarding the values shown in table no.2, the participants had the most agreement in survey with questions 2, 3, 4 and 55, the medians of which are 4.01, 4.42, 4.04 and 3.80 respectively. The most disagreement was with questions 1 and 6, the medians of which are 3.55 and 3.14 respectively. It is worth noting that closeness of mean and median of data shows normal distribution of data.

c) *The variable of "tourismfacilities and services"*

Regarding the values shown in table no.3, the participants had the most agreement in survey with the questions 3, 4, 5 and 6, the medians of which are 3.95, 3.98, 4.88 and 3.92 respectively. The most disagree-

ment was with the questions 1 and 2, the medians of which are 2.74 and 2.25 respectively. It is worth noting that the closeness of mean and median of data shows normal distribution of data.

d) *The variable of "governmental factors"*

Regarding the values shown in table no.4, the participants had the most agreement in survey with the questions 2, 3 and 4, the medians of which are 4.64, 3.83, and 4.25 respectively. The most disagreement was with the questions 1, 5 and 6, the medians of which are 2.40, 2.74 and 2.61 respectively. It is worth noting that the closeness of mean and median of data shows normal distribution of data.

IX. APPENDIX 2

Table 1 : Descriptive statistics of the variable of Research Model

Variable	Item	No							Mean	Median	St. Deviation
		0	6	5	4	3	2	1			
Hospital Facilities and Services	Medical expenses in Zahedan are low.	5	17	24	16	22	15	3	3.96	4	1.44
	There is export medical personnel in hospitals.	4	10	14	14	31	16	13	3.30	3	1.50
	Threat of endemic diseases in Zahedan.	9	39	38	11	3	0	0	5.17	5	0.91
	After discharge, asking about patients' health is done.	9	26	20	14	19	8	6	4.20	4	1.56
	Medical equipment like wheelchair and the like is a lot in Zahedan.	10	10	13	20	24	18	7	3.47	3	1.43
	To facilities treatment, contracts have been signed with different insurances.	14	2	6	8	24	36	12	2.61	2	1.17
Hotels, Food and Beverage	Accommodation expenses are low in Zahedan.	21	9	12	17	24	15	4	3.55	3	1.37
	Hotels staff in zahedan are professional.	46	8	12	15	15	0	0	4.01	4	1.22
	Zahedan hotels serve suitable type of food and beverage for patients.	43	13	19	13	9	4	1	4.42	5	1.27
	The costs of food and drink are low in Zahedan.	19	15	18	15	27	7	1	4.04	4	1.31
	There are services like internet in Zahedan hotels.	39	9	11	14	18	10	1	3.80	4	1.34
	Facilities like elevator and bathroom.	27	8	8	5	28	18	8	3.14	3	1.45
Tourism Facilities	Access to Zahedan through air and land is easy.	8	1	10	6	35	31	11	2.74	3	1.15
	Mentality of people in other towns towards Zahedan is good.	10	1	1	16	14	30	30	2.25	2	1.18
	General transportation services in Zahedan are appropriate.	7	8	29	21	27	8	2	3.95	4	1.21
	The weather in Zahedan is favorable most of the time.	5	21	21	14	23	13	5	3.98	4	1.53
	There are a lot of cultural and recreational attractions	5	39	27	16	12	2	1	4.88	5	1.18

	in zahedan.										
	There are services like sport facilities in Zahedan.	11	14	25	12	24	12	4	3.92	4	1.44
Governmental Factors	Rights of guests are observed in Zahedan.	15	3	3	6	25	27	23	2.4023	2	1.24
	The rate of hospitality among people of Zahedan in high.	11	28	31	16	6	8	2	4.64	5	1.33
	There is cultural interchange between natives and people of other towns.	28	10	18	23	4	11	8	3.8378	4	1.55
	The rate of crime is high in Zahedan.	8	28	18	16	19	8	5	4.2553	4	1.53
	Different jobs in Zahedan have their own syndicates.	32	1	5	9	23	24	8	2.7429	3	1.13
	ATM services are easily	3	3	4	5	42	30	15	2.6162	3	1.12

e) *Similarity test of independent research variables*

In order to examine rating of research variables of the research Friedman test was employed. Table no.5 shows median of rating for each variable. The higher the values in the median of ratings, the more important they are. In this study the variable of tourist facilities with rating median of 3.03 receives the most importance and the variable of regional factors with rating median of 1.69 receives the least importance. Regarding the variables shown in table no.5 (sig=0.00, X²= 123.432) sig>5 and this indicates that importance of research variables is not similar from the viewpoint of participants in survey.

X. APPENDIX 3

Table 2 : Mean Rank

Variable	Mean Rank
"Hospital Facilities and Services"	2.70
"Hotels, Food and Beverage"	2.58
"Tourism Facilities"	3.03
"Governmental Factors"	1.69

XI. APPENDIX 4

Table 3 : Friedman Test

N	102
X ²	59.856
df	3
P-value	0.000

XII. RESEARCH FINDINGS

This paper obtains results of the survey from experts of medical department of Zahedan's hospitals. Research findings for 4 independent variables are as follows:

a) *The variable of medical services and facilities*

According to descriptive data it is concluded that: Zahedan has a good status in terms of medical

expenses and caring about patients after discharge. There are endemic diseases in Zahedan and medical centers are weak owing to lack of medical experts, medical facilities and contract with different insurances.

b) *The variable of accommodation, food and drink*

According to descriptive data it is concluded that: hotels in Zahedan are appropriate owing to expert personnel, suitable types of food for patients, low costs of food and drink, access to internet for medical tourists. However in terms of accommodation expenses and existence of facilities like elevator and bathrooms in hotels and procurement of appropriate types of food for patients, it has some weaknesses.

c) *The variable of tourist facilities and services*

According to descriptive data it is concluded that: in the area of tourist facilities and services, appropriateness of general transportation services, favorable weather most of the time, existence of recreational facilities, rich culture and sports facilities, Zahedan has great potentials. However it does not have a good status in terms of air and land accessibility and mentality of people in other towns.

d) *The variable of regional factors*

According to descriptive data it is concluded that: people in Zahedan are hospitable and there is cultural interchange between natives and people of other towns. The high value in the median of question 4 indicates high rate of crime in Zahedan from the viewpoint of participants in the survey. Zahedan has some weaknesses in terms of observing the rights of guests, existence of jobs with special syndicates and ATM services.

XIII. CONCLUSION

Sadr momtaz and Agharahimi (2010) in their study show coordination between the parts involved in tourism and creation of incentives to invest in medical tourism. This coordination is accessible through a syst-

ematic and organized approach. The model under study in this research includes all parts of medical tourism both in starting point and destination and it offers some guidelines with respect to the role of each one.

Delgoshaee et al (2012) have classified challenges and opportunities for Iran's medical tourism in four factors of strategic and competitive status, terms of demand, dependent industries, patrons and operating terms. Organizing medical tourism with systematic approach and expanding it causes enhancement of competition in tourist destination among other destinations and the first step is correct management for expansion of medical tourism.

Regarding the results of research analysis and previous studies it is concluded that the town of Zahedan has the necessary potentials to conduct activities in the area of medical tourism. Low costs of treatment turn Zahedan into a proper place for medical tourism in the country and east. Also Zahedan needs to absorb experts and expansion of hospital equipment must be considered by organizers. Controlling endemic diseases must also be taken into account. Regarding low expenses of accommodation in Zahedan, hotels and accommodation centers in Zahedan have the opportunity to attract medical tourists. If they pay more attention to matters like serving appropriate types of food for patients, they will have better opportunities. Existence of historical and recreational attractions in Zahedan is a major factor in trips taken by medical tourists. Also mentality of people and citizens in other towns needs to be improved through organizing and conducting marketing activities. Hospitality of the people in Zahedan must be taken into account. To control crime rate in Zahedan correct management by responsible organizations is essential.

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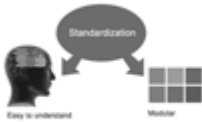




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28. Make colleagues: Always try to make colleagues. No matter how sharper or intelligent you are, if you make colleagues you can have several ideas, which will be helpful for your research.

29. Think technically: Always think technically. If anything happens, then search its reasons, its benefits, and demerits.

30. Think and then print: When you will go to print your paper, notice that tables are not be split, headings are not detached from their descriptions, and page sequence is maintained.

31. Adding unnecessary information: Do not add unnecessary information, like, I have used MS Excel to draw graph. Do not add irrelevant and inappropriate material. These all will create superfluous. Foreign terminology and phrases are not apropos. One should NEVER take a broad view. Analogy in script is like feathers on a snake. Not at all use a large word when a very small one would be sufficient. Use words properly, regardless of how others use them. Remove quotations. Puns are for kids, not grunt readers. Amplification is a billion times of inferior quality than sarcasm.

32. Never oversimplify everything: To add material in your research paper, never go for oversimplification. This will definitely irritate the evaluator. Be more or less specific. Also too, by no means, ever use rhythmic redundancies. Contractions aren't essential and shouldn't be there used. Comparisons are as terrible as clichés. Give up ampersands and abbreviations, and so on. Remove commas, that are, not necessary. Parenthetical words however should be together with this in commas. Understatement is all the time the complete best way to put onward earth-shaking thoughts. Give a detailed literary review.

33. Report concluded results: Use concluded results. From raw data, filter the results and then conclude your studies based on measurements and observations taken. Significant figures and appropriate number of decimal places should be used. Parenthetical remarks are prohibitive. Proofread carefully at final stage. In the end give outline to your arguments. Spot out perspectives of further study of this subject. Justify your conclusion by at the bottom of them with sufficient justifications and examples.

34. After conclusion: Once you have concluded your research, the next most important step is to present your findings. Presentation is extremely important as it is the definite medium though which your research is going to be in print to the rest of the crowd. Care should be taken to categorize your thoughts well and present them in a logical and neat manner. A good quality research paper format is essential because it serves to highlight your research paper and bring to light all necessary aspects in your research.

INFORMAL GUIDELINES OF RESEARCH PAPER WRITING

Key points to remember:

- Submit all work in its final form.
- Write your paper in the form, which is presented in the guidelines using the template.
- Please note the criterion for grading the final paper by peer-reviewers.

Final Points:

A purpose of organizing a research paper is to let people to interpret your effort selectively. The journal requires the following sections, submitted in the order listed, each section to start on a new page.

The introduction will be compiled from reference matter and will reflect the design processes or outline of basis that direct you to make study. As you will carry out the process of study, the method and process section will be constructed as like that. The result segment will show related statistics in nearly sequential order and will direct the reviewers next to the similar intellectual paths throughout the data that you took to carry out your study. The discussion section will provide understanding of the data and projections as to the implication of the results. The use of good quality references all through the paper will give the effort trustworthiness by representing an alertness of prior workings.



Writing a research paper is not an easy job no matter how trouble-free the actual research or concept. Practice, excellent preparation, and controlled record keeping are the only means to make straightforward the progression.

General style:

Specific editorial column necessities for compliance of a manuscript will always take over from directions in these general guidelines.

To make a paper clear

- Adhere to recommended page limits

Mistakes to evade

- Insertion a title at the foot of a page with the subsequent text on the next page
- Separating a table/chart or figure - impound each figure/table to a single page
- Submitting a manuscript with pages out of sequence

In every sections of your document

- Use standard writing style including articles ("a", "the," etc.)
- Keep on paying attention on the research topic of the paper
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- Align the primary line of each section
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- Use past tense to describe specific results
- Shun familiar wording, don't address the reviewer directly, and don't use slang, slang language, or superlatives
- Shun use of extra pictures - include only those figures essential to presenting results

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Choose a revealing title. It should be short. It should not have non-standard acronyms or abbreviations. It should not exceed two printed lines. It should include the name(s) and address (es) of all authors.



Abstract:

The summary should be two hundred words or less. It should briefly and clearly explain the key findings reported in the manuscript-- must have precise statistics. It should not have abnormal acronyms or abbreviations. It should be logical in itself. Shun citing references at this point.

An abstract is a brief distinct paragraph summary of finished work or work in development. In a minute or less a reviewer can be taught the foundation behind the study, common approach to the problem, relevant results, and significant conclusions or new questions.

Write your summary when your paper is completed because how can you write the summary of anything which is not yet written? Wealth of terminology is very essential in abstract. Yet, use comprehensive sentences and do not let go readability for brevity. You can maintain it succinct by phrasing sentences so that they provide more than lone rationale. The author can at this moment go straight to shortening the outcome. Sum up the study, with the subsequent elements in any summary. Try to maintain the initial two items to no more than one ruling each.

- Reason of the study - theory, overall issue, purpose
- Fundamental goal
- To the point depiction of the research
- Consequences, including definite statistics - if the consequences are quantitative in nature, account quantitative data; results of any numerical analysis should be reported
- Significant conclusions or questions that track from the research(es)

Approach:

- Single section, and succinct
- As a outline of job done, it is always written in past tense
- A conceptual should situate on its own, and not submit to any other part of the paper such as a form or table
- Center on shortening results - bound background information to a verdict or two, if completely necessary
- What you account in an conceptual must be regular with what you reported in the manuscript
- Exact spelling, clearness of sentences and phrases, and appropriate reporting of quantities (proper units, important statistics) are just as significant in an abstract as they are anywhere else

Introduction:

The **Introduction** should "introduce" the manuscript. The reviewer should be presented with sufficient background information to be capable to comprehend and calculate the purpose of your study without having to submit to other works. The basis for the study should be offered. Give most important references but shun difficult to make a comprehensive appraisal of the topic. In the introduction, describe the problem visibly. If the problem is not acknowledged in a logical, reasonable way, the reviewer will have no attention in your result. Speak in common terms about techniques used to explain the problem, if needed, but do not present any particulars about the protocols here. Following approach can create a valuable beginning:

- Explain the value (significance) of the study
- Shield the model - why did you employ this particular system or method? What is its compensation? You strength remark on its appropriateness from a abstract point of vision as well as point out sensible reasons for using it.
- Present a justification. Status your particular theory (es) or aim(s), and describe the logic that led you to choose them.
- Very for a short time explain the tentative propose and how it skilled the declared objectives.

Approach:

- Use past tense except for when referring to recognized facts. After all, the manuscript will be submitted after the entire job is done.
- Sort out your thoughts; manufacture one key point with every section. If you make the four points listed above, you will need a least of four paragraphs.



- Present surroundings information only as desirable in order hold up a situation. The reviewer does not desire to read the whole thing you know about a topic.
- Shape the theory/purpose specifically - do not take a broad view.
- As always, give awareness to spelling, simplicity and correctness of sentences and phrases.

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This part is supposed to be the easiest to carve if you have good skills. A sound written Procedures segment allows a capable scientist to replacement your results. Present precise information about your supplies. The suppliers and clarity of reagents can be helpful bits of information. Present methods in sequential order but linked methodologies can be grouped as a segment. Be concise when relating the protocols. Attempt for the least amount of information that would permit another capable scientist to spare your outcome but be cautious that vital information is integrated. The use of subheadings is suggested and ought to be synchronized with the results section. When a technique is used that has been well described in another object, mention the specific item describing a way but draw the basic principle while stating the situation. The purpose is to text all particular resources and broad procedures, so that another person may use some or all of the methods in one more study or referee the scientific value of your work. It is not to be a step by step report of the whole thing you did, nor is a methods section a set of orders.

Materials:

- Explain materials individually only if the study is so complex that it saves liberty this way.
- Embrace particular materials, and any tools or provisions that are not frequently found in laboratories.
- Do not take in frequently found.
- If use of a definite type of tools.
- Materials may be reported in a part section or else they may be recognized along with your measures.

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- Report the method (not particulars of each process that engaged the same methodology)
- Describe the method entirely
- To be succinct, present methods under headings dedicated to specific dealings or groups of measures
- Simplify - details how procedures were completed not how they were exclusively performed on a particular day.
- If well known procedures were used, account the procedure by name, possibly with reference, and that's all.

Approach:

- It is embarrassed or not possible to use vigorous voice when documenting methods with no using first person, which would focus the reviewer's interest on the researcher rather than the job. As a result when script up the methods most authors use third person passive voice.
- Use standard style in this and in every other part of the paper - avoid familiar lists, and use full sentences.

What to keep away from

- Resources and methods are not a set of information.
- Skip all descriptive information and surroundings - save it for the argument.
- Leave out information that is immaterial to a third party.

Results:

The principle of a results segment is to present and demonstrate your conclusion. Create this part a entirely objective details of the outcome, and save all understanding for the discussion.

The page length of this segment is set by the sum and types of data to be reported. Carry on to be to the point, by means of statistics and tables, if suitable, to present consequences most efficiently. You must obviously differentiate material that would usually be incorporated in a study editorial from any unprocessed data or additional appendix matter that would not be available. In fact, such matter should not be submitted at all except requested by the instructor.



Content

- Sum up your conclusion in text and demonstrate them, if suitable, with figures and tables.
- In manuscript, explain each of your consequences, point the reader to remarks that are most appropriate.
- Present a background, such as by describing the question that was addressed by creation an exacting study.
- Explain results of control experiments and comprise remarks that are not accessible in a prescribed figure or table, if appropriate.
- Examine your data, then prepare the analyzed (transformed) data in the form of a figure (graph), table, or in manuscript form.

What to stay away from

- Do not discuss or infer your outcome, report surroundings information, or try to explain anything.
- Not at all, take in raw data or intermediate calculations in a research manuscript.
- Do not present the similar data more than once.
- Manuscript should complement any figures or tables, not duplicate the identical information.
- Never confuse figures with tables - there is a difference.

Approach

- As forever, use past tense when you submit to your results, and put the whole thing in a reasonable order.
- Put figures and tables, appropriately numbered, in order at the end of the report
- If you desire, you may place your figures and tables properly within the text of your results part.

Figures and tables

- If you put figures and tables at the end of the details, make certain that they are visibly distinguished from any attach appendix materials, such as raw facts
- Despite of position, each figure must be numbered one after the other and complete with subtitle
- In spite of position, each table must be titled, numbered one after the other and complete with heading
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Discussion:

The Discussion is expected the trickiest segment to write and describe. A lot of papers submitted for journal are discarded based on problems with the Discussion. There is no head of state for how long a argument should be. Position your understanding of the outcome visibly to lead the reviewer through your conclusions, and then finish the paper with a summing up of the implication of the study. The purpose here is to offer an understanding of your results and hold up for all of your conclusions, using facts from your research and generally accepted information, if suitable. The implication of result should be visibly described. Infer your data in the conversation in suitable depth. This means that when you clarify an observable fact you must explain mechanisms that may account for the observation. If your results vary from your prospect, make clear why that may have happened. If your results agree, then explain the theory that the proof supported. It is never suitable to just state that the data approved with prospect, and let it drop at that.

- Make a decision if each premise is supported, discarded, or if you cannot make a conclusion with assurance. Do not just dismiss a study or part of a study as "uncertain."
- Research papers are not acknowledged if the work is imperfect. Draw what conclusions you can based upon the results that you have, and take care of the study as a finished work
- You may propose future guidelines, such as how the experiment might be personalized to accomplish a new idea.
- Give details all of your remarks as much as possible, focus on mechanisms.
- Make a decision if the tentative design sufficiently addressed the theory, and whether or not it was correctly restricted.
- Try to present substitute explanations if sensible alternatives be present.
- One research will not counter an overall question, so maintain the large picture in mind, where do you go next? The best studies unlock new avenues of study. What questions remain?
- Recommendations for detailed papers will offer supplementary suggestions.

Approach:

- When you refer to information, differentiate data generated by your own studies from available information
- Submit to work done by specific persons (including you) in past tense.
- Submit to generally acknowledged facts and main beliefs in present tense.



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<i>Introduction</i>	Containing all background details with clear goal and appropriate details, flow specification, no grammar and spelling mistake, well organized sentence and paragraph, reference cited	Unclear and confusing data, appropriate format, grammar and spelling errors with unorganized matter	Out of place depth and content, hazy format
<i>Methods and Procedures</i>	Clear and to the point with well arranged paragraph, precision and accuracy of facts and figures, well organized subheads	Difficult to comprehend with embarrassed text, too much explanation but completed	Incorrect and unorganized structure with hazy meaning
<i>Result</i>	Well organized, Clear and specific, Correct units with precision, correct data, well structuring of paragraph, no grammar and spelling mistake	Complete and embarrassed text, difficult to comprehend	Irregular format with wrong facts and figures
<i>Discussion</i>	Well organized, meaningful specification, sound conclusion, logical and concise explanation, highly structured paragraph reference cited	Wordy, unclear conclusion, spurious	Conclusion is not cited, unorganized, difficult to comprehend
<i>References</i>	Complete and correct format, well organized	Beside the point, Incomplete	Wrong format and structuring



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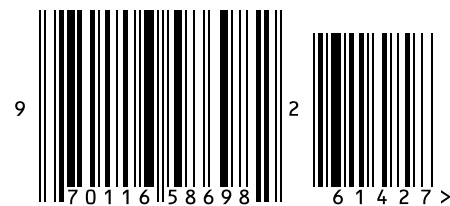
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