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Examining Tourism Cluster Development in State-led Economies: the Cases of Dubai and Singapore

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Table of Contents

<i>Abstract</i>	1
<i>Acknowledgement</i>	2
Chapter One: Problem Statement	3
1.1 Introduction.....	3
1.2 Study relevance.....	4
1.3 Research structure	5
Chapter Two: Theoretical and Conceptual Framework	6
2.1 Developmental state theory.....	6
2.2 Conceptual framework.....	7
Chapter Three: Research Design	9
3.1 Introduction.....	9
3.1.1 Problem statement and research objectives.....	9
3.1.2 Sub-questions	10
3.2 Research methodology – process-tracing	10
3.2.1 Case selection.....	10
3.3 Justification of the time period.....	10
3.4 Limitations to the study	11
3.5 Scope of the study	11
3.6 Data selection.....	12
Chapter Four: Literature Review	13
4.1 Tourism development in Dubai.....	13
4.2 Tourism development in Singapore	15
Chapter Five: Case Study: Tourism Development in Dubai	17
5.1 Introduction.....	17
5.2 Overview	17
5.3 Tourism development in a historical context	17
5.4 State capitalism	19
5.4.1 State-led tourism development.....	21
5.5 Primary policy factors behind building a successful tourism industry	23
5.5.1. Providing amenities for the tourism cluster	23
5.5.2. Destination branding	30
5.5.3. Determining tourism’s success	31
5.6 Conclusion	32

Chapter Six: Case Study: Tourism Development in Singapore.....	33
6.1 Introduction.....	33
6.2 Overview.....	33
6.3 Tourism development in a historical context.....	34
6.4 State capitalism.....	35
6.4.1 State-led tourism development.....	37
6.5 Primary policy factors behind building a successful tourism industry.....	39
6.5.1 Providing amenities for the tourism cluster.....	40
6.5.2. Destination branding.....	45
6.5.3. Determining tourism’s success.....	46
6.6 Conclusion.....	47
Conclusion and future research recommendations.....	48
Bibliography.....	51

Table of Figures

Figure 1: Research diagram.....	9
Figure 2: Dubai’s primary institutions, SOHCs, and subsidiaries for tourism cluster development.....	20
Figure 3: Dubai's VSCIS.....	22
Figure 4: Dubai's tourism cluster performance indicators.....	25
Figure 5: Contribution of the commerce and tourism clusters to GDP (%)......	27
Figure 6: Tourism facilities across Dubai’s tourism cluster.....	28
Figure 7: Examples of events and luxury brands in Dubai.....	29
Figure 8: Singapore’s primary institutions, SOHCs, and subsidiaries for tourism cluster development....	36
Figure 9: Singapore's VSCIS.....	38
Figure 10: Singapore’s tourism cluster performance indicators.....	41
Figure 11: Tourism facilities across Singapore's tourism cluster.....	44
Figure 12: Examples of events and luxury brands in Singapore.....	45

Abstract

The literature on state-led tourism development in the Emirate of Dubai and the Republic of Singapore is scarce. Moreover, it is not clear how state capitalist systems of government transformed both city-states into successful tourism destinations. Research has shown that physical infrastructure provision and destination brand marketing play an important role in the success of both polities. However, most of the available works tend to have a superficial nature and are dated. This study endeavors to offer a more profound and detailed analysis of the government policy factors that explain a successful tourism cluster outcome in both cases with new data collected by the author. An answer to this question is relevant to policy-makers in states with similar political-economy configurations that seek to develop a tourism industry. Building on existing works on tourism cluster development in state-led economies, this research asks: “What primary government policy factors explain the establishment of a successful tourism sector in the state-led economies of Dubai and Singapore in the period between 1990 and 2018?”

This research employs the qualitative method of theory-building process-tracing and approaches tourism cluster development with the ‘developmental state theory’ taken from the discipline of international political economy. Analysis of the primary and secondary data shows that tourism, in both Dubai and Singapore, is a pillar in an overarching state-led economic development strategy that operates in synergy with the commerce, events, real estate, tourism, and transport clusters. Moreover, both Dubai and Singapore combine control over government institutions and state-owned holding companies, complemented by transnational companies, to control tourism-relevant enterprises and to develop the tourism cluster. Coordination between public and private sector entities enables efficient canalization of resources complying with long-term developmental tourism visions. Under those circumstances, both governments conducted two synergic primary policies: first, constructing state-of-the-art tourism infrastructure, and second, orchestrating a sophisticated brand marketing campaign. The research found these policies explain the success of tourism in Dubai and Singapore.

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Chapter One: Problem Statement

1.1 Introduction

The Emirate of Dubai and the Republic of Singapore transformed from global backwaters, in the British Empire's twilight, into cosmopolitan metropolises in just over fifty years. Tourism cluster development became an essential component in this journey. According to the United Nations World Tourism Organization, tourism is one of the fastest growing industries in the world and plays a key role in overall socio-economic development of destinations (UNWTO 2017, 37). Dubai's ruling al-Maktoum dynasty and Singapore's People's Action Party (PAP), led by the Lee dynasty, built thriving tourism sectors and established themselves as Asia's premier tourist destinations, despite spatial or climatologic obstacles. In effect, both polities became intercontinental airline hubs and hosts of luxurious accommodations and attractions. Technocratic elites in both polities admitted reciprocal inspiration regarding developmental strategies (Henderson 2006, 33; Hvidt 399; Ulrichsen 2016, 69). Dubai and Singapore initially evoked a stereotypical 'third-world country' image. Whereas today, both have successfully climbed the developmental ladder to become 'first-world' polities with prospering tourism sectors that rivals seek to emulate (Ulrichsen 2016, 68, 77; Sharpley 2008, 28).

In effect, the question arises how does the causal mechanism behind successful tourism industrialization work? This question has not been answered sufficiently in the literature from a political-economy perspective. Therefore, by employing the methodology of theory-building process-tracing and embracing the developmental state paradigm, this research seeks to answer the question: What primary government policy factors explain the establishment of a successful tourism sector in the state-led economies of Dubai and Singapore in the period between 1990 and 2018?

The author hypothesizes successful tourism development happened in Dubai and Singapore due to the presence of efficient state capitalist systems. These systems are characterized by: autonomy in decision-making, highly-centralized governments, the absence of menacing political opposition, and interlocking public and private sector directorships that enable the

effective pursuit of long-term tourism visions. Tourism serves as a designated key cluster in an overarching state capitalist developmental strategy, wherein the key clusters: commerce, events, real estate, tourism, and transport operate in synergy. Moreover, control of government institutions, and the vertical integration of government-related entities (GREs) and state-owned enterprises (SOEs) relevant for tourism, under state-owned holding companies (SOHC), organized the economy conveniently enabling the coordination of public and private resources in accordance with the ruling elites' tourism developmental visions, which this study dubs a vertical supply chain integration strategy (VSCIS).

Institutional and economic control, facilitated two primary developmental policies. The first one relates to the provision of goods and services. The rapid supply of physical commercial, tourism, and transport infrastructure by the real estate sector, laid the foundation for the state's tourism assets. Additionally, tourism agencies focused on providing a plethora of events to raise year-round demand. Second and finally, both tourism agencies successfully wielded their soft power. In effect, sleek destination branding and marketing campaigns have been created that raise demand in international markets. The synergy between both product and services supply, and destination marketing established two successful tourist destinations.

1.2 Study relevance

Unraveling the causal mechanism behind tourism cluster development in Dubai and Singapore is of significance to particularly city-states for best practices. Although complete emulation is unlikely, lessons can be adapted to their own unique political-economy and socio-cultural configurations through fragmentary borrowing, mimicking, and selected replication (Henderson 2012, 69; Chua 2011, 36). Beside policy relevance, this research also has academic relevance. This study will make an epistemological contribution to the field of tourism sector development in state-led economies. Dubai and Singapore have both offered a unique successful state-led model for economic development which has defied the western-centric dictates of the neoliberal Washington Consensus and the role of the small state. Following the Asian Financial Crisis of 1997-1999 and the Great Recession of 2008-2009 neoliberalism has been weakened in reputation. On the other hand, scholarly interest in state capitalism is growing and researching tourism development in two state-led economies improves the reader's understanding of industry development in societies akin (Bremmer 2009; Hvidt 2009, 399; Ulrichsen 2016, 69).

1.3 Research structure

In order to answer the research question, this dissertation will pursue the following roadmap: after this chapter, chapter 2 presents the primary theoretical and conceptual framework for this study. Subsequently, chapter 3 illustrates the research design i.e. the methodological and structural approach used to dissect the research question. Chapter 4 reviews the body of literature on tourism sector development in Dubai and Singapore. Chapter 5 presents the Dubai case study and unboxes the policy factors that were contributive to a successful tourism sector. Chapter 6 presents the Singapore case study and unboxes the policy factors that were contributive to a successful tourism sector. Finally, a conclusion and future research recommendations will follow.

Chapter Two: Theoretical and Conceptual Framework

2.1 Developmental state theory

This chapter discusses the study's theoretical framework applied to the research question. The author will apply developmental state theory (DST) taken from the discipline of international political economy. According to the literature, a consensus exists researching tourism in Singapore and Dubai should be done with DST. DST overlaps with the concept of 'state capitalism', which Bremmer conceptualizes as: "a system in which the state functions as the leading economic actor and uses markets primarily for political gains" (Bremmer 2010, 6; Ulrichsen 2016, 61; Hvidt 2009). The DST paradigm emerged in response to the inability of socialism and neoliberal capitalism to account for the 'Asian Miracle'. A period from 1960 to 1990 wherein East and Southeast Asian states produced admirable economic growth by espousing the DST model. DST is a conflation of neoliberalism, a free market economy with a small state, and socialism, a planned economy wherein the means of production are state-owned (Al Ameri 2013, 87).

Singapore exemplifies a successful post-colonial Asian developmental state (Al Ameri 2013, 87-88). Whereas, Dubai belongs to a new generation of developmental states (Hvidt 2009, 398-400). Moreover, inspired by Singapore, it is considered the Persian Gulf's most successful and innovative emirate (Ulrichsen 2016, 65, 69). However, in the case of Dubai, rentier state traits affected its developmental trajectory. Dubai's successful tourism industry development was buttressed by hydrocarbon revenues – economic rents.¹ Although Dubai is no longer reliant on hydrocarbons, rentier state characteristics still exist which makes it different from a hydrocarbon devoid Singapore (Sharpley 2008, 27; Henderson 2007b, 35; Thompson 2013, 15-16).

In essence, DST highlights how a coalition of government ministers, bureaucrats, and technocrats prioritize economic growth and infrastructure development over all else (Pereira 2008, 1190). Hvidt argues DST has four characteristics: first, a sense of urgency among states to catch

¹ The concept of 'rent' can be explained as external unproductively-earned payments received by a government (Gray, 2011, 1). Whereas, a non-rentier state extracts the majority of its revenues through taxation. Rents are accumulated by a small elite, and distributed and allocated to society that utilize and further distribute the rents. Due to the absence of taxation, states do not have to account for their allocative decisions. Moreover, this feature allows ruling families and their governments to evade the democratization process and consolidate authoritarian rule (Luciani 2013, 114-15; Deshwal 2017, 1).

up with advanced economies, particularly former colonizers, and assert their economic freedom and self-governance (Stephenson and Ali-Knight 2010, 282). Second, the state fulfills an active interventionist role in the economy in pursuit of its long-term developmental agenda. Coordinated efforts exist between state institutions, national resources, GREs and SOEs, and political bases for efficient interventionism. Conventional wisdom describes SOEs as bloated, corrupt, inefficient, and money-bleeding enterprises. On the contrary, Singapore and Dubai own streamlined, market-disciplined, profit-oriented, and innovative SOEs and GREs with executive boards comprising wage-earning technocrats and business professionals that only stay in business when profitable (Hertog 2010, 271; Chua 2017, 114).

Third, they possess ‘embedded autonomy’. This denotes the idea that the state’s bureaucracy is at heart of society, and can autonomously formulate developmental approaches and objectives without interference of powerful political elites in civil-society. State autonomy prevents ‘state capture’ by elite interest groups i.e. hijacking the executive and legislative branches of government. For instance, Kuwait a state similar to Dubai i.e. in oil wealth and culture lacks embedded autonomy, and has failed to develop a flourishing tourism sector (Paris and Ruben 2013, 1-8). Fourth and finally, the state is embedded in a socio-economic environment wherein strong and rapid interactions exist between the public and private sector, often with interlocking boards of directors. Technocrats provide the bureaucratic elite with information, regarding market opportunities, and serve as agents to execute a developmental agenda (Hvidt 2009, 399; Ulrichsen 2016, 61).

2.2 Conceptual framework

This section engages with conceptualizing a tourist, tourism development, tourism planning, and the tourism supply chain. To begin with, this study defines a tourist as: as a visitor seeking experiences and fulfilment of its wishes. The traveler should be understood as a value-pursuing individual seeking e.g. leisure, relaxation, entertainment, and personal enrichment (al Ameri 2013, 249). To continue, Mason argues tourism development should be understood in the context of planning (Mason 2003, 63). Teo and Chang conceptualize tourism development as: “a state-led phenomenon spearheaded by conscious attempts at ‘inventing resources’ to meet the needs of global travelers, and to augment both real and perceived shortcomings in its resource endowment” (2000, 117). Williams conceptualizes development planning as: “(...) an ordered sequence of

operations and actions that are designed to realize one single goal or a set of interrelated goals” (quoted in Mason 2003, 66).

Hall argues planning is future-oriented and aims to solve observed problems by offering solutions that maximize development benefits when executed with predictable outcomes. Therefore, according to Wilkinson, planning provides the manual how development should take place in a specific socio-economic environment. Williamson and Hall argue the concept of ‘planning’ is difficult to define considering it can fit in many contexts i.e. different levels of analysis e.g. local, regional, and national or in the public and private sector contributing to a ‘problem of coordination’ (quoted in Mason 2003, 66). Chadwick, Hall, and Veal highlight the importance of the decision-making process in planning. Moreover, Hall emphasizes the complexity to carefully integrate a sequence of actions, and Gun and Veal, stress settling on values underpinning the plan as they are a reflection of the values deemed important by the stakeholders involved (quoted in Mason 2003, 67-68).

Healey asserts that policy-making and planning are social processes underlined with values (quoted in Mason 2003, 68). Williams claims tourism development has four primary objectives: (1) provision of tourist facilities; (2) coordinating the facets of tourism i.e. transportation, accommodation, marketing, and human resources; (3) efficient use of resources and consolidation of a sustainable profitable tourism model; and (4) streamlining tourism by enhancing benefits and cutting back on loss-making endeavors (quoted in Mason 2003, 70-71). William’s objectives illuminates the importance of the tourism supply chain, which this study defines as: “(...) a network of tourist organizations involved in a series of diverse activities, ranging from providing an entire spectrum of components of tourism products/services [e.g.] flights, accommodation (..), and [the sale of tourism products at the destination]” (Szpilko 2017, 688).

Tourism development is a political process depending on the intentions of the government according to Hall. Fennel emphasizes the process requires objectives that could be pursuit, most often done, by governments. Lickorish argues government presumed tourist sector development is a task for the private sector. Although, Williams indicates tourism development increasingly involves public and private bodies (quoted in Mason 2003, 71-72).

Chapter Three: Research Design

3.1 Introduction

This chapter discusses the study's methodology. The author espouses DST and qualitative methods, theory-building process-tracing, to answer the research question: What primary government policy factors explain the establishment of a successful tourism sector in the state-led economies of Dubai and Singapore in the period between 1990 and 2018?

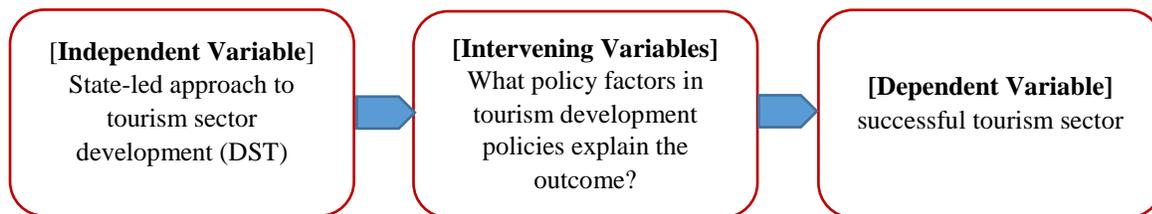


Figure 1: Research diagram

3.1.1 Problem statement and research objectives

Dubai and Singapore exemplify how a former colony and protectorate managed to play developmental catch-up with their former colonial overlord. Tourism development has become an important part in their developmental models. Literature on state-led tourism development is scarce. Furthermore, the limited information available poses three issues: first, authors tend to focus on either brand marketing or on physical infrastructure provision; second, when studies discuss both, it tends to have a superficial essence and a small scope; and third, authors tend to zoom in on cultural, environmental, and identity implications of tourism development. Nevertheless, there are also few works that cover both brand marketing, and physical infrastructure provision concurrently in more depth as laid out in the literature review.

This research has two objectives to advance the literature on tourism development: first, providing a pervasive comprehensive approach of physical infrastructure provision and brand marketing contributive to the creation of a successful tourism cluster; and second, to present the tourism cluster as an integral pillar, within an overarching state-led development strategy, which operates in synergy with the commerce, events, real estate, and transport clusters.

3.1.2 Sub-questions

The study needs to answer the following set of sub-questions per case to answer the main research question:

1. In what historical context did the idea emerge to develop a tourism sector?
2. To what extent do government institutions contribute to the tourism development process and how do they relate to planning and executing policies?
3. What is the role of the commerce, events, real estate, and transport clusters in the development of tourism products and services?
4. How does the government tackle tourism destination branding?
5. How successful has the government been in tourism sector development?

3.2 Research methodology – process-tracing

This study makes use of qualitative research methods and uses within-case process-tracing. Process-tracing, aimed at theory-building, will be used in two separate case studies to identify the primary policy factors executed by the governments of Dubai and Singapore that account for a successful tourism sector outcome. Subsequently, the author will check whether the hypothesis holds (Beach and Pedersen 2013, 17-18).

3.2.1 Case selection

The cases of Dubai and Singapore were chosen, because both are primary Asian tourism destinations. Moreover, the literature has shown both polities have drawn inspiration from each other regarding developmental policies. Additionally, they share resemblances: first, both are small city-states with a history as *entrepôt* trading hub; second, they espouse a state-led approach to tourism development; and third, both were former British territories that gained independence in the era of decolonization (Althani 2017, 23; Ulrichsen 2016, 69-70; Al Ameri 2013, 87).

3.3 Justification of the time period

This study will scrutinize the period from the 1990s until 2018. This timeframe was chosen to enable a comparative window between Dubai and Singapore. Singapore, already started

developing a tourism industry in the 1960s, whereas Dubai started to take-off in the 1990s (Chye 2015, 11; Pereira 2008, 1194).

3.4 Limitations to the study

There are some limitations to this study: first, the author is aware studying Dubai and Singapore together is odd, considering the former is a quasi-sovereign emirate in a federal state, whereas the latter is a sovereign state. Examining the case of Dubai omits the federal government's influence in tourism development. The federal level cannot be taken into account due to the scope of this dissertation, however it must be acknowledged the federal level affects developmental policy-making in Dubai.

Second, this study focuses on tourism sector development. Nevertheless tourism overlaps with other sectors such as commerce, events, real estate and transport. This necessitates addressing these sectors and their contribution to tourism. However, it is outside the scope of this work to fully discuss every contribution by SOEs and GREs to tourism sector development. This research aspires to illuminate the connections which can be made visible with evidence.

Third, the authoritarian nature of the selected cases obstructs access to data on decision-making e.g. official planning and policy documentation. To illustrate, strategic visions that failed or were accomplished are not accessible anymore as primary sources. In the case of Dubai, only the economic development reports for 2017 and 2018 are accessible. The tourism agency did not make available its annual reports. However, most SOEs do have documentation that goes back to the 2000s. Singapore documented tourism visions better, nevertheless for various statutory boards and GREs they go back to the 2000s. Data prior to the available primary materials were derived from secondary sources.

3.5 Scope of the study

This research focuses exclusively on developmental tourism-serving policies. Hence, complete economic diversification strategies will not be discussed. The study recognizes that tourism cluster development serves as a synergic pillar in an overarching long-term visions. Therefore, other primary clusters will be touched upon, because they are inextricably linked with the tourism sector.

3.6 Data selection

This dissertation deploys primary and secondary sources of information. First, the secondary sources were collected from the disciplines of international affairs, international political economy, urban planning studies, tourism management, and transport management. In addition, newspaper articles and websites were collected for information pertinent to specificities. Second, the primary data were collected via government reports, websites, the statistics centers of Dubai and Singapore, local tourism authorities, annual reports of SOEs and GREs, and taken from academic articles. Furthermore, the author collected policy documents on tourism sector development for analysis such as: the Dubai's Aviation Strategic Plan 2020; the 2021 Dubai plan; the Dubai Strategic Plan 2015; Dubai Annual Economic Reports (2017-2018), data from the Dubai Statistics Centre, and press statements by Dubai's ruler. For Singapore, documents from the Ministry of Trade and Industry (MTI), annual reports by the Singapore Tourism Board, annual reports by the Changi Airport Group, and the Ministry of Finance (MoF) were used.

Chapter Four: Literature Review

4.1 Tourism development in Dubai

Political-economy literature on state-led tourism development in Dubai is scarce and outdated – most articles are from the period 2007-2013. Bloch (2010), Al Ameri (2013, 315-316), Hvidt (2009), Thompson (2013 and 2016), and Van Helmond and Van Montfort (2007, 16) argue Dubai's tourism development is steered by the ruler's council. This council controls the primary clusters in the economy, creates developmental objectives, and monitors and executes the developmental visions. In addition, a subordinate tourism agency implements and tracks the developmental progress, and is responsible for branding and marketing.

Dubai possesses seven critical political-economy privileges: first, domestic political stability in a post 9/11, 2001 world and conflict-riven region (Sharpley 2008, 28). Second, access to domestic hydrocarbon wealth for development (Gemenetzi 2013, 2486). Third, it is a popular destination for regional foreign direct investment (FDI) (Gemenetzi 2013, 2486). Fourth, the absence of political opposition facilitated the uninterrupted leadership by the al-Maktoum dynasty, which enabled long-term developmental planning and concentrated leadership (Henderson 2007a, 35; Sharpley 2008, 27-28). Fifth, access to a financial safety net on federal level – Abu Dhabi rescued Dubai fiscally in the 2008-2009 economic crisis (Bloch 2010, 948). Six, Dubai has successfully assumed a liberal image, e.g. alcohol consumption and Western dress codes are legal, which appeals to consumers from the East and West. This has given Dubai an advantage in a region where conservative Islam is hegemonic (Balakrishnan 2008, 77). Seven and finally, Dubai has a strategic location along aerial, maritime and land trade routes and the communication and transport infrastructure to benefit from it (Benchabane 2013). These privileges have been contributive to an all-round tourism cluster, despite the absence of cultural and natural tourism resources which are seen as prerequisites for building a tourism sector (Henderson 2006, 88).

Deffner and Liouris (2010), Sharpley (2008), Gemenetzi (2013), Al Ameri (2013, 315-316), Stephenson and Ali-Knight (2010, 280-282), and Kotsi and Michael (2015, 157) argue Dubai's tourism development policy comprises a two-pronged approach, which has contributed to its ascendancy as a major tourism destination. The first element, has been physical infrastructure

provision that contributes to aviation, commerce, tourism, and transport infrastructure. Second and finally, Dubai's tourism agency created a polished destination branding effort involved in branding; hosting major events e.g. business, multilateral, sports, and cultural conventions; and linking global celebrities and renowned brands with Dubai.

Other authors tend to focus on one or the other. Regarding infrastructure provision, Pacione (2005, 265) sees the construction sector as the cornerstone for Dubai's development. Property development drives the tourism sector's expansion. Van Helmond and van Montfort (2007, 15-16) wrote a study about urban development in Dubai. They argued how the government disciplined its property SOEs, by letting them compete with each other in the market. Sharpley (2008) adds that the government also imported foreign property developers for their expertise in developing tourism infrastructure in public-private partnerships. Bloch (2010, 943, 945, 948), wrote about the real estate boom (2003-2008) and the damage inflicted by the Great Recession (2008-2009) on Dubai's property market. He argued, prior to the crisis, property SOEs were encouraged to engineer bold, new designs with a superlative construction ethos. Moreover, they borrowed heavily in international markets to realize this ambition. However, the crisis forced the emirate to put many megaprojects on hold.

Kotsi and Michael (2015), Henderson (2007), Douglas (2019) and Lohmann et al. (2009) emphasize the strategic importance of an aviation-transportation-tourism-commerce nexus. "An adequate transport infrastructure is a prerequisite for receiving, accommodating and processing these visitors, and a well-designed infrastructure can be the basis for the development of a tourism destination" (quoted in Lohmann et al. 2009, 205).

Finally regarding destination branding, Balakrishan (2008, 78, 81) emphasized the importance of brand familiarity to attract tourists and a broad portfolio of leisure activities. Dubai's home brands aim to be superlatives and the emirate deploys its SOEs as brand ambassadors. Sutton (2016) provides a deeper analysis of the importance of events: "[Dubai's] events have developed from being basic products, just intended to enhance the portfolio of benefits offered by a destination, and have become strategic marketing tools intended to attract tourists. [They] help develop awareness for [Dubai]; and to promote, position, and brand [it]" (Sutton 2015, 360).

4.2 Tourism development in Singapore

Political-economy literature on state-led tourism development for Singapore is limited. The information available has a descriptive and iterative nature. To start, Chye (2015) contends the retreat of the British and the secession of Singapore from the Malay Federation in 1965 was the impulse for Singapore to designate tourism as a key economic sector in order to boost the economy. Furthermore, Chua (2011) emphasized the importance of how Singapore was cut off from its Malaysian hinterland that compromised the economy. Altogether a precarious situation emerged and tourism was developed as a necessity to survive. In effect, Singapore's leadership turned to the world as hinterland. Authors concur tourism development in Singapore is a state-led endeavor (Teo and Chang 2000; Ooi 2005; Chen 2016; and Henderson 2011). Fontaine (1999) and Carney (2014) identified tourism sector development as a pillar in Singapore's overarching export-oriented growth and *entrepôt* model, which gave Singapore fame as a 'Tiger' economy.

In regard to Singapore's political economy, Henderson (2007) and Chua (2011) asserted, successful tourism development occurred due to the visionary leadership of the Lee family, which has stood at the helm of the People's Action Party (PAP) since independence. Furthermore, the PAP groomed an adept hierarchic technocratic elite that is unchallenged by political opposition, incorruptible, and free in long-term planning without electoral interruptions in their rule. Ooi (2002) adds in such a system popular or unpopular policies can be implemented rapidly and thus contribute to the generation of tourism resources. Chua (2016), Chen (2016), and Sim, Thomson, and Yeong (2014) underline the government's strong grip over the economy through SOHC Temasek and subsidiaries.

Chye (2015) indicates tourism sector development is ascribed to the Singapore Tourism Board (STB), which is a statutory board under the MTI and well-connected to other government authorities. Henderson et. al. (2011) stated nascent Singapore had poor quality natural, heritage, and artificial tourism attractions. In response, the STB's predecessor assumed a proactive role facilitating tourism asset development, rather than merely providing stimuli to the private sector (Chye 2015). Teo and Chang (2000) attribute Singapore's success to the STB's: streamlined brand marketing, inventing tourism resources, and high-quality communication and transportation networks. Nevertheless, Ooi (2002) and Henderson (2007) warn the STB cannot control international calamities such as financial crises, pandemics, terrorist attacks, and interstate warfare, and is therefore dependent on domestic, regional, and international stability. The literature

available can be divided in studies discussing, one the one hand, branding and marketing Singapore, and on the other, urban planning focused on tourism and transport infrastructure provision.

Regarding branding and marketing, Henderson (2006), (2007), and (2011) researched how Singapore's tourism agencies efficiently engage in brand marketing abroad. She concluded Singapore's brand marketing is comprehensive and aims at recreational, business, educational, and medical tourism with multilingual and eclectic content. Ooi's study (2010) examines how Singapore has reclaimed and reshaped orientalist discourses, which serve tourism purposes. Henderson (2002) states that Singapore has fully invested in presenting itself as a multiracial, multicultural, heritage rich, and modern Asian destination. Ooi (2002) researched the modus operandi of the Singapore Tourism Board (STB) and, Sakaguchi (2017), Ooi (2005), and Chye (2015) studied the discourse embedded in the STB's tourism plans. They noted Singapore's tourism strategy shifted from a nationalist to a regionalist approach which transformed rivals into partners in the 1990s and stressed that Singapore profiles itself as a transit gateway for Southeast Asia and a gateway for East and West. Finally, Henderson (2012) and Ooi (2005) state that tourism image creation, identity formation, and nation-building go together in Singapore.

Regarding urban planning focused on tourism and transport infrastructure provision, Shatkin (2014), Henderson et al. (2011), and Chye (2015) argue, state capitalism facilitated the construction of tourism infrastructure e.g. cultural, historic, and shopping districts via control of the real estate sector. Chua (2011) adds the importance of 'land acquisition' policies to the above and Henderson (2011) argues a core element of Singapore's development strategy is to continue reinventing and upgrading its tourism infrastructure. As example, Henderson (2016) wrote a study about Singapore's integrated casino-resorts. This was a breakthrough, because gambling was legalized by the government to bolster the hampering tourism sector. Due to the limited domestic market, Sikorski (1990), Henderson (2007) and Lohmann et al. (2009) highlighted the strategic importance of the transportation-tourism nexus. Singapore used its geographical comparative advantage to enhance connectivity and has invested in aviation, tourism infrastructure, and ports to attract international tourists. Shatkin (2014) argues tourism has been a method to catch additional revenues and Chua (2011) asserted Singaporeans view the world as their market in the absence of natural resources e.g. land and population.

Chapter Five: Case Study: Tourism Development in Dubai

5.1 Introduction

The aim of this chapter is to examine the primary policy factors underlying successful tourism development in Dubai. The chapter starts with a brief overview. Consequently, five sub-questions will be discussed: first, in what historical context did the idea emerge to develop a tourism sector? Second, to what extent do government institutions contribute to the tourism development process and how do they relate to planning and executing policies? Third, what is the role of the commerce, events, real estate, and transport clusters in the development of tourism products and services? Fourth, how does the government tackle destination branding? Fifth and finally, how successful has the government been in tourism sector development? Afterwards, a conclusion will follow.

5.2 Overview

The Emirate of Dubai is the economic heart of the federal United Arab Emirates (UAE), which is a federation of monarchies. The UAE comprises the emirates of Abu Dhabi, Ajman, Dubai, Fujairah, Umm al-Quwain, Ras al-Khaimah and Sharjah. In a timespan of fifty years, Dubai developed from a desert entrepôt and pearling society into a hypermodern economy. (Hvidt 2009, 403-405; Sutton 2016, 353). Dubai is ruled by the al-Maktoum dynasty and is autonomous in economic policy-making (Henderson 2006, 91). Prior to independence, Dubai was part of the Trucial States from 1820 to 1971 – a British protectorate. In 1971, the UAE gained independence following the withdrawal of British forces from the Persian Gulf region (CIA – UAE 2016).

5.3 Tourism development in a historical context

In the wake of independence, the ruling al-Maktoum family understood that Dubai's limited oil reserves, small population, and collapsing economy; necessitated economic diversification before oil reserves would deplete. The discovery of oil in 1966, provided a windfall income for financing development (Thompson 2016, 161; Thompson 2013, 45). Dubai had no single hotel in the 1950s. However in the two decades after independence, rapid economic development was initiated by investing oil revenues in transport and later tourism infrastructure. Nevertheless, in the period

1950-1990, Dubai remained reliant on hydrocarbons. Under the late Sheikh Rashid bin Saeed al-Maktoum (r. 1958-1990), Dubai developed: airports, roads, seaports, and telecommunication to underline its historical status as regional entrepôt. The leadership realized successful diversification became an existential matter (Sharpley 2008, 14; Bloch 2010, 944).

In the mid-1980s, Dubai adopted an export-oriented development strategy. Consequently, the first cohorts of business tourists entered from Western Europe and neighboring Gulf Cooperation Council countries (Kotsi and Michael 2014, 155; Bloch 2010, 944). Around this time, tourism development was seen as a catalyst to develop business and attract FDI. Crown Prince Sheikh Mohammad saw potential in tourists entering and decided to ascribe a grander role to tourism. The new strategy focused on the rapid creation of hotels and transport infrastructure, through public-private partnerships. Furthermore, the establishment of Emirates Airlines, henceforth Emirates, in 1985 and the Dubai Tourism and Commerce Promotion Board (DTCPB) in 1989 illustrates Dubai's commitment to tourism cluster development. Consequently, annual tourist visitors increased and motivated Dubai's leadership to make tourism the end instead of the means (Sharpley 2008, 21). The al-Maktoums had found a new purpose for the emirate's beaches, climate, and deserts. Moreover, Dubai's historic exposure to foreigners helped to reinvent itself and to put it on the map

By the early 1990s, the hotel industry was developing on the foundations laid earlier by Sheikh Rashid. His death started the leadership's rejuvenation under Sheikh Maktoum bin Rashid al-Maktoum (r. 1990-2006). He commenced an ambitious non-oil diversification scheme in reaction to the critical depletion of its minor oil supplies (Bloch 2010, 944; Stephenson and Ali-Knight 2010, 278). In the 1990s, Sheikh Mohammad was appointed as chair of Dubai's DTCPB. He intended to enhance the utility of the tourism cluster. Dubai's leadership understood the potential of two elements: first, its geographical advantage – 2/3 of the world's population lives in a four to eight hour flight range, which makes Dubai an attractive intercontinental gateway (Dubai Airports 2013, 14-15). Second, legalizing alcohol-consumption and Western dress codes contributed to its relatively liberal and orientalist allure in Islam's conservative heartland (Sharpley 2008, 22).

Sheikh Mohammad (r. 2006-now) continued his pedigree's legacy of development. Sheikh Maktoum and Mohammad both accelerated commerce, real estate, tourism, and transport development. Moreover, they created a financial infrastructure with favorable tax rates that

facilitated the influx of FDI. In 2003, a milestone was reached when oil revenues were surpassed by tourism revenues (Bloch 2010, 944-945; Kotsi and Michael 2015, 154; Mason 2016, 96-97).

5.4 State capitalism

Dubai's state capitalist model is a manifestation of a one-man political vision executed by the politics' institutions. The model is characterized by a highly-centralized government, with a neopatrimonial nature, operating through patron-client relations. Hence, the government is reminiscent of a social web with the ruler, Sheikh Mohammad, at center. High-ranking officials across the emirate's institutional hierarchies are patrons that provide public funds to clients in return for loyalty, labor, and developmental compliance. Moreover, the bureaucratic elite attempts to maintain Sheikh Mohammad's favor and support of their clients. The governments' neopatrimonial structure, enables dirigisme wherein a ruling elite atop of institutions can engineer the economy and implement developmental visions (Hvidt 2009, 400-402).

Dubai's variant of state capitalism has been tailored for a society where the indigenous population is outnumbered by expatriates and to control the domestic influence of transnational corporations (Thompson 2016, 161). Moreover, it follows a two-pronged approach: first, Dubai's government created special economic free zones for transnational companies to settle, in order to benefit from knowledge and capital in the local economy through public-private partnerships. GREs make the essential investments to guarantee projects' stability and safety, before the private sector companies join. Second, Dubai's government focuses on nurturing successful local SOEs and GREs ultimately fit for competition on an international level (Thompson 2013, 61, 170, 196-197; Hvidt 2009, 405-407; Sharpley 2008, 23).

Dubai's institutional infrastructure constitutes a two-tier system. The first-tier revolves around traditional authorities responsible for public goods. Under Sheikh Maktoum, the second-tier emerged in 2003. The new structure has the Dubai Executive Council (DEC) at heart (Hvidt 2009, 401). Prior to 2006, over sixty SOEs had managed the current tasks of the DEC. Since Sheikh Mohammad's accession in 2005-2006, Dubai's political-economy configuration changed. In effect, all government SOEs were merged and Dubai was restructured in three major SOHCs: Dubai Holding, Dubai World, and the Investment Corporation of Dubai (ICD). Dubai Holding is owned by Dubai's ruler, whereas the other two SOHCs are not (Thompson 2016, 162). Dubai's government is a majority and minority investor in public and private corporations partaking across Dubai's economy. However, the line between political and commercial leadership is blurry as

well as the difference between royal and public assets. Dubai's government established a unique combination of dirigisme and ownership. (Thompson 2016, 162-163; Sharpley 2008, 26).

The DEC is the emirate's most powerful institution regarding developmental decision-making and operates as the economy's control panel behind closed doors (Ulrichsen 2016, 72). Currently, the DEC is chaired by Dubai's Deputy Ruler Sheikh Hamdan bin Rashid al-Maktoum and assists the ruler in governing the emirate. The council comprises the elite

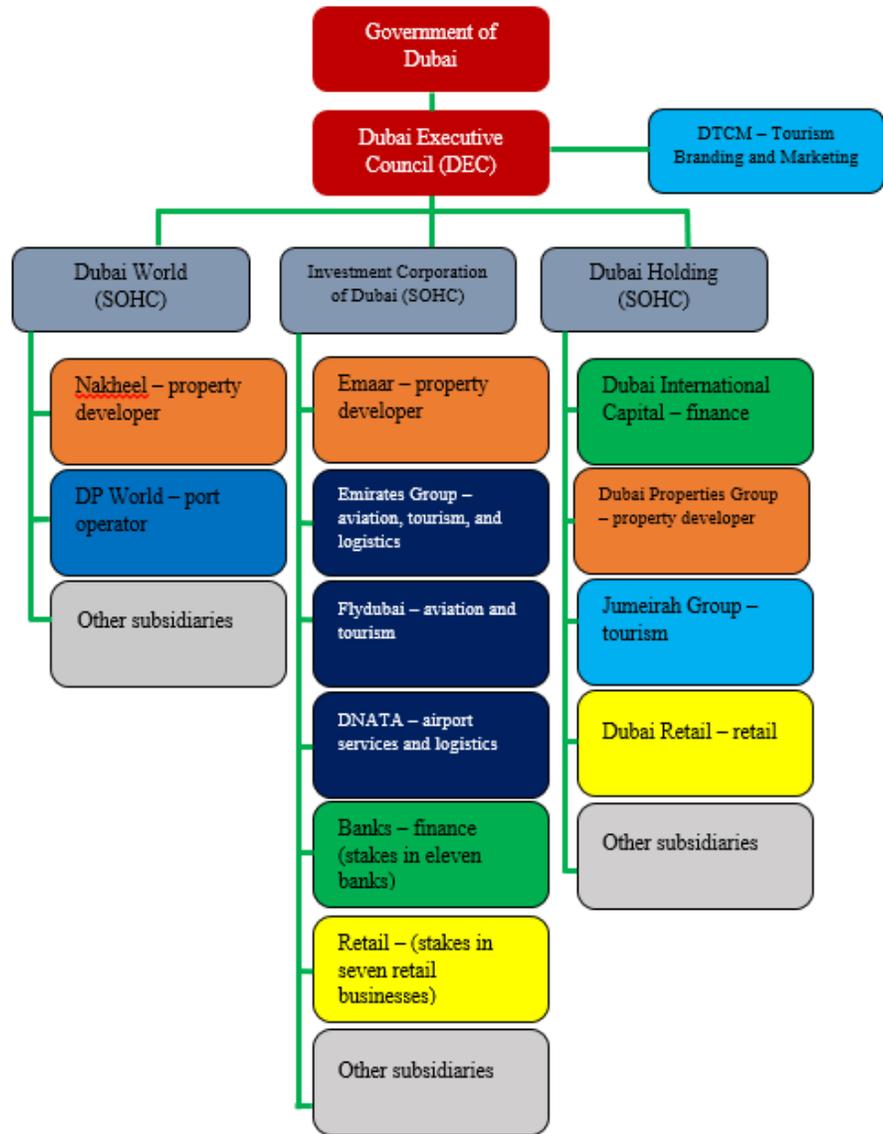


Figure 2: Dubai's primary institutions, SOHCs, and subsidiaries for tourism cluster development

directors of SOHCs and government institutions (Government of Dubai 2018a; The Executive Council 2015a). SOHCs should be seen as the instruments for industrial development and receive their directives from the DEC (see figure 2²) (Thompson 2016, 163). These flagship SOHCs are supervised by the ruler's most skilled technocrats and equipped with their own banks and investment organs, real estate wings, and other subsidiaries (Hvidt 2009, 401-402).

² Figure inspired on Musacchio (2010) found in (Haryopratora et al. 2011, 13). Revamped by author and updated. Sources used are the websites of SOHCs: Dubai World, ICD, and Dubai Holding. They can be found in the bibliography.

The al-Maktoum family has made Dubai famous for its rapid decision-making. The current institutional configuration allows rapid communication from technocrats leading GREs, through the directors of SOHCs, to Sheikh Mohammed – ‘Dubai’s CEO’. This set-up allows the leadership to outmaneuver market rivals and to exploit economic opportunities at high pace (Hvidt 2009, 403; Sharpley 2008, 26). Technocrats like Sheikh Ahmed bin Saeed Al Maktoum, President of Dubai’s Civil Aviation Authority, Chairman of SOHC Dubai World, and CEO of the Emirates Group; and Helal Saeed Almarri, the Director General of Dubai’s Department of Tourism and Commerce Marketing (DTCM) represent interconnected primary clusters, and meet frequently in DEC meetings (The Executive Council, 2015c). During DEC meetings, both technocrats meet with Sheikh Mohammad and Hamdan who both represent SOHCs ICD and Dubai Holding. From the above, it can be inferred that three al-Maktoum members, who control all three SOHCs, hold substantial power over the economy to execute predetermined plans. This section attempted to illustrate this in the context of the DEC.

5.4.1 State-led tourism development

Dubai’s government conducts a VSCIS for tourism (see figure 3). A VSCIS denotes: proactively acquiring enterprises, involved in various steps of production and distribution, within the same supply chain for its developmentalist pursuits. The government executes its VSCIS via the DEC and coordinates efforts by its SOHCs’ subsidiaries and the private sector in order to orchestrate the creation of efficient unique tourism products and services in line with Sheikh Mohammad’s vision (Kenton 2018; Szpilko 2017, 688). Moreover, Dubai has structured its economy in strategic clusters entangled with each other namely: commerce, events, real estate, transport, and tourism (Government of Dubai 2019, 66). Porter defines clusters as: “geographical concentrations of interconnected companies, specialized suppliers, service providers, firms in related industries and associated [government] institutions in a particular field that compete but also co-operate” (quoted in Thompson 2013, 197). The main advantage of clustering economic sectors is the creation of a multiplier effect (Government of Dubai 2019, 67). Due to the synergic nature of development, improvements per cluster spill-over in the other, which enables aggressive economic growth.

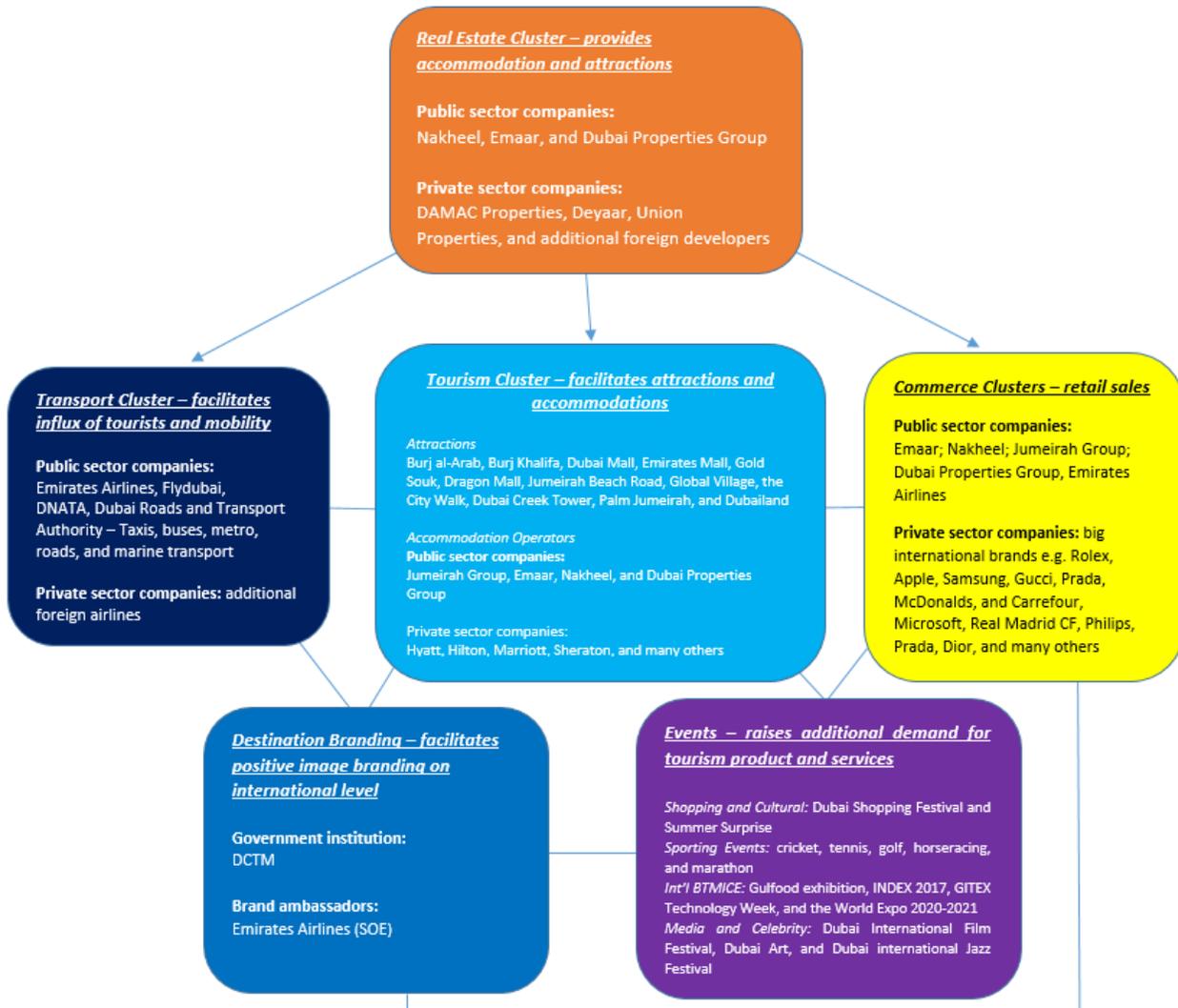


Figure 3: Dubai's VSCIS³

State-led tourism development in Dubai emerged in the 1980s with the establishment of the DTCPB. In 1997, the DTCM replaced the DTCPB (Stephenson and Ali-Knight 2010, 279). At first sight, the DTCM appears as the main organ behind tourism industry development. Although, in reality its authority is limited and real power lies with the DEC. All investment decisions in attractions and accommodations are checked by the ruler and cannot continue without his approval. While the real estate craftsmanship is left to the property developers (Sharpley 2008, 25). The DEC is mandated to: “set high-level policy”; “endorse development plans and monitor

³ Visualization of Dubai’s VSCIS. The information has been gathered from the Government of Dubai’s Annual Reports (2017 and 2018). The information in the boxes is no attempt to delimit cluster activity and merely serves as examples of a larger phenomenon.

their implementation after their approval; and “establish and organize government departments, institutions and authorities in line with the interests of the emirate, and monitor these entities’ work” (quoted in The Executive Council 2015a).

Regarding the DTCM, Director-General Almarri manages day-to-day operation whereas Sheikh Hamdan supervises. Primary objectives of the DTCM are: reviewing DEC tourism plans; destination branding; training staff; encouraging FDI; mediating between industry stakeholders; establishing public-private partnerships; benchmarking products; and granting licenses to hotels, transport, and tour operators (Sharpley 2008, 26; Al Ameri 2013, 222-223). The DTCM has twenty overseas offices for brand promotion across: Africa, Australia, Europe, North America and Southern and Eastern Asia (Henderson 2006, 36-37). Currently, the DTCM endeavors to bring 20 million tourist visitors to Dubai by 2020 and triple tourism’s contribution to the economy as articulated by its ‘Vision for Tourism’. The DTCM upholds a three-pronged approach: first, maintaining and expanding existing market share – through improved tourist asset supply, second, aggressive marketing in emerging economies e.g. China and within Latin America, and third, prolonging and increasing return visits (DTCM, 2013).

To conclude, this section has shown that the DEC and DTCM are the primary government institutions involved in building Dubai’s tourism cluster. The DEC is responsible for developing and executing developmental plans, through espousing a VSCIS and using SOHCs and subsidiaries as instruments for tourism cluster development in a coordinated effort. Whereas, the DTCM occupies a role aimed at reviewing the DEC’s plans and brand marketing Dubai abroad.

5.5 Primary policy factors behind building a successful tourism industry

The section below will discuss the development of tourism products and services, the government’s role in destination branding, and will evaluate how successful the government has been in tourism cluster development.

5.5.1. Providing amenities for the tourism cluster

Three generations of leadership used efficient supply-side policies to develop Dubai’s tourism cluster. ‘Tourism destination supply’ denotes the array of goods and services available conducive to enhancing visitors’ stay at the destination. Supply-side policies expect supply to generate its own demand. This approach to building tourism accommodation and attractions is high-risk,

although it provides the initiator with a ‘first-mover advantage’, long-term economic growth, and augmented tourism assets qualitatively and quantitatively (Hvidt 2009, 405-406; Douglas 2019, 74; Al Ameri 2013, 114; Agarwal 2018). Dubai’s government managed to realize tourism development through employing a mix of domestic and international companies since the 1990s. In the 2000s, a strategic nexus between Dubai’s primary economic clusters: commerce, events, real estate, tourism, and transport emerged, which are still embraced in developmental vision ‘Plan 2021’ (The Executive Council, 2015b). This section will discuss the supply-side policies implemented by Dubai’s government in the context of a VSCIS.

Transport Cluster

The provision of state-of-the-art air, sea, and road transport infrastructure, by Dubai’s government, enhanced the share of international tourists entering the emirate. On land, air-conditioned bus stops, fly-overs, double-decked highways, bridges, and ring roads form the foundation of Dubai’s transport network. Additionally, domestic mobility has been boosted by the presence of: a large taxi fleet, metro, and monorail, which facilitates the rapid transport of tourists across the city-state. At sea, Dubai seeks to gradually expand cruise ship tourism and has four docks available. In 2017, 625,000 cruise tourists visited Dubai. Cruise ship tourism is still expanding and the emirate aspires to become a regional hub during the cooler season (Government of Dubai 2019, 75, 77; Bagaen 2007, 187).

The air connection, is Dubai’s most important point of entry. Aviation has been a backbone of Dubai’s development strategy for decades (Government of Dubai 2018, 53; Lawton and Weaver 2011, 164). The emirate’s possession of a luxury and budget home-carrier, combined with state-of-the-art airport infrastructure, provides the air bridge for: receiving, accommodating, and processing increased tourism demand (Lohmann et al. 2009, 205; Dubai Airports 2013, 20-21; Douglas 2019, 74, 78). The establishment of Emirates in 1985 and flydubai in 2008; the airport expansions in 1998, 2000, 2008 at Dubai International Airport; and the opening of world’s largest al-Maktoum Airport in 2013 (max. capacity for 160 million passengers when fully operational) have been paramount for Dubai’s development as tourism destination.

Airport infrastructure has enhanced Dubai’s accessibility and interconnectivity. Besides, it has allowed the emirate to profit from international markets by attracting tourists carrying foreign exchange. In 1990, Emirates connected its hub Dubai with only 22 destinations, whereas in 2017

it operated flights to 157 destination cities. Moreover, in 2018, Emirates operated a modern fleet of wide-bodied aircraft, comprising B777s and A380s. In 1990, it possessed merely 8 small aircraft. Saliently, there appears to be a correlation between increasing fleet size, destination cities, and visiting tourists during the period 1990-2018 (see figure 4). In addition, the gradual removal of visa restrictions since 2001 and an Open Skies policy enabled other airlines to contribute to the city’s visitor growth and connectivity – over 150 airlines operate flights to 220 destinations (Dubai Airports 2013, 20; Sharpley 2008, 22).

Years	Visiting Tourists (millions)	Total Available Hotel Rooms	Room Occupancy Rate (%)	Number of Hotels	EK Fleet Size	EK Destination Cities	Total Passenger Demand (millions)
1990	0.63	n/a	n/a	n/a	8	22	n/a
1991	0.72	n/a	n/a	n/a	11	26	n/a
1992	0.94	n/a	n/a	n/a	15	31	n/a
1993	1.09	n/a	n/a	n/a	15	32	n/a
1994	1.24	n/a	n/a	n/a	17	34	n/a
1995	1.60	n/a	n/a	n/a	16	38	n/a
1996	1.77	n/a	n/a	n/a	19	41	n/a
1997	1.79	n/a	n/a	n/a	22	44	n/a
1998	2.18	n/a	n/a	n/a	26	47	n/a
1999	2.48	n/a	n/a	n/a	32	50	n/a
2000	3.03	n/a	n/a	n/a	35	55	n/a
2001	3.63	21,428	60.9	264	38	57	n/a
2002	4.76	23,170	70.1	272	46	64	n/a
2003	4.98	25,571	72.4	271	61	73	n/a
2004	5.42	26,414	81.1	276	69	76	n/a
2005	6.16	28,610	84.6	290	85	83	n/a
2006	6.44	30,850	82.0	302	96	89	n/a
2007	7.0	32,617	84.4	319	109	99	n/a
2008	7.5	37,261	81.5	341	127	99	n/a
2009	7.6	43,419	69.8	352	142	102	n/a
2010	8.49	51,115	70.0	382	148	112	47.2
2011	9.3	53,828	74.0	387	169	123	50.9
2012	10.16	57,345	78.0	399	197	133	56.5
2013	11.0	61,670	80.0	416	217	142	62.0
2014	13.2	n/a	n/a	n/a	231	144	68.0
2015	14.2	72,473	77.0	461	251	153	75.3
2016	14.9	77,879	76.0	475	259	156	79.6
2017	15.79	82,733	78.0	485	268	157	84.2
2018	16.7	83,899	87.0	492	n/a	n/a	88.4

Figure 4: Dubai's tourism cluster performance indicators ⁴

Real Estate Cluster

The aviation sector transports passengers to Dubai for lay-overs, however making transit passengers visit for leisure and business ends requires the presence of tourism accommodations

⁴“Dubai’s Statistics Center (DSC) defines a tourist as anyone staying in a hotel or accommodation for one night or more” (quoted in Government of Dubai 2019, 61). The ‘Visiting Tourists’ column is based on data from Henderson (2007, 37) for (1990-2004), DSC for (2005-2018), Emirates 247, Gulf News, and the DTCM. The columns: ‘Total Available Hotel Rooms’, ‘Room Occupancy Rate’, ‘Number of Hotels’ are based on data from al-Ameri (2013, 242) for (2001-2005) and the DSC for (2006-2018). ‘Emirates Fleet Size’ and ‘Emirates Destination Cities’ columns are based on data from Emirates annual reports (1990-2018). Finally, the column on ‘Total Passenger Demand’ is based on data from Dubai Airports (2013, 21).

and attractions built by the real estate cluster (Lohmann et al. 2009, 206; Balakrishnan 2008, 78). Dubai's development ethos is characterized by being the biggest, grandest, highest, and tallest (Vardhan 2008, 248). From 1990 to 2000, the first tourism assets emerged like the Burj al-Arab Jumeirah seven-star hotel and the Jumeirah Emirates Towers. During the period 2000-2010, transport and tourism infrastructure sprouted at high speed across the emirate, however the crisis in 2008-2009 curbed Dubai's property march (Al Ameri 2013, 218, 244).

Following a slump, real estate development is picking up pace again in preparation for the World Expo 2020-2021 – The government aspires to prepare 160,000 rooms by 2020 (Sutton 2016, 353-354; Government of Dubai 2018, 83). In 2001, Dubai counted 264 hotels, whereas in 2018 the amount rose to 492, which is a substantial 86% increase. Qua hotel rooms, Dubai counted 21,428 rooms in 2001. This rose to 83,899 rooms in 2018, which is a staggering increase of 391% (see figure 4). Beside hotels, Dubai has embraced platforms like Airbnb to organize rental of private assets. Home-owners can rent their properties for short periods with a DTCM license to benefit tourism in the city-state (Government of Dubai 2019, 70). Noteworthy, is there appears to be a correlation between increasing tourist visitors, hotels, and available rooms (see figure 4).

The government managed to control a majority segment of property development through competition of three SOHC's property wings: the ICD's 'Emaar'; Dubai World's 'Nakheel'; and Dubai Holding's 'Dubai Properties Group'. Competition generated quality tourism infrastructure: Emaar constructed the 'Burj Khalifah' – world's tallest tower (829.8m), Dubai Mall – among world's largest malls, Dubai Marina, and is currently constructing the 'Dubai Creek Tower' which will overtake the Burj Khalifah as tallest artificial construction (1,000m); Nakheel delivered the iconic offshore 'Palm Jumeirah' peninsula, 'the World' archipelago, Dragon Mall, and the 'International City Dubai'; and Dubai Properties Group delivered the 'Jumeirah Beach Residence' and is currently constructing entertainment park 'Dubailand' (Bloch 2010, 945; Al Ameri 2013, 252).

All property developers delivered the city-state with iconic buildings and abundant accommodation. The real estate sector has given Dubai an impressive portfolio of tourism infrastructure, which consequently attracted scores of tourists to Dubai, and confirmed its status as futurist tourist destination.

Commerce Cluster

Dubai's commerce cluster is entangled with the events, tourism, transport, and real estate clusters and plays an important role in the city-state's VSCIS. The element of shopping becomes evident upon arrival at Dubai Airport. The venue houses a duty-free shopping center with 35,400 square meters of retail space. Dubai hosts the largest concentration of retail brands worldwide, with 62% off international brands represented, which underlines its status as primary shopping destination (Government of Dubai 2018, 55; Government of Dubai 2019, 86). Determining the share of the commerce cluster⁵ to tourism is difficult due to the vast nature of the service economy and the overlapping indices (see figure 5).

On the one hand, Dubai's government minimally determined the contribution of the tourism cluster⁶ to gross domestic production (GDP) increased from 3.5% in 2009 to 4.9% in 2017. The problem with these data is the neglect of the role of the shopping and retail industry. On the other hand, Dubai's government stated the commerce cluster contributed 26.6% to GDP in 2017, of which a quarter is ascribed to international tourism i.e. 6.65% of GDP (Government of Dubai 2019, 86). Despite the discrepancy and the lack of granularity, the data on annual tourist visitors in figure 4 and contributions to GDP in figure 5 does shows an estimation of the correlation between the commerce-tourism nexus.

Year	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Commerce Cluster Contribution to GDP (%)	28.1	27.4	26.3	27.0	28.0	27.4	28.1	27.5	27.8	27.1	26.6
Tourism Cluster Contribution to GDP (%)	n/a	n/a	3.5	3.6	4.0	4.1	4.1	4.5	4.7	4.7	4.9

Figure 5: Contribution of the commerce and tourism clusters to GDP (%)⁷

⁵ The DSC defines the commerce cluster as: wholesale, retail trade, and the repair of motor vehicles and motorcycles.

⁶ The DSC defines the tourism cluster narrowly to include accommodation and food services activities (restaurants and hotels).

⁷ Data extracted from the Dubai Economic Report (Government of Dubai 2019, 67-68, 86-87).

Dubai is home to a myriad of luxury hotels, restaurants, beaches, malls and shopping districts using ‘retailtainment’ and ‘edutainment’ formulas to offer products and services to citizens and tourists beside its conventional sun-sand-sea formula bound to seasonality. Retailtainment denotes the synergy between shopping and entertainment amenities e.g. ice skating rinks, cinemas, ski slopes, theme parks, aquariums, and events (Al Ameri 2013, 235-236, 250). Whereas edutainment denotes the subsequent synergy between entertainment and education e.g. the Ibn Battuta Mall offers many shops, entertainment, and the story of 14th century Arab explorer Ibn Battuta. The strategy of augmenting indoor amenity supply allows Dubai to omit weather-related push factors. Furthermore, Dubai attempts to expand its tourism amenities portfolio by enhancing supply of products and services relevant for business, medical, cultural, sports and ecotourism (see figure 6). (Henderson 2006, 94; Government of Dubai 2019, 72).

Type of Tourism	Examples of Supplied Facilities
Commercial	<i>Dubai Mall, Emirates Mall, Ibn Battuta Mall, Jumeirah Beach Road, BoxPark, The Outlet Village, City Walk, Burj Khalifa, Gold Souk, and Burj al-Arab</i>
Business	<i>Dubai World Trade Centre and Business Bay District</i>
Sports	<i>Sports City; Sports Facilities for: F1, motor, camel and horse racing; water sports, swimming, tennis, cycling, basketball, volleyball, golf, football, sailing, rugby, boxing, polo and equestrian, extreme sports and cricket</i>
Medical	<i>Healthcare City</i>
Culture and Heritage	<i>Sharia Mosque, Dubai Opera, Sheikh Mohammad Library, Dubai Museum, Etihad Museum, Heritage Village and fortresses</i>
Eco	<i>Al-Maha Resort; Dubai Desert Conservation Reserve, Ras al-Khor Wildlife Sanctuary; facilities for bird spotting, sand skiing, falconry, safaris and dune driving</i>

Figure 6: Tourism facilities across Dubai’s tourism cluster⁸

Beside the myriad foreign transnational brands (see figure 7), Dubai’s SOHCs are also present in the commerce cluster. First, SOHC Dubai Holding owns the Jumeirah Group, a well-established luxury hospitality company. This SOE owns 12 luxury hotels in Dubai, among them the iconic Burj al-Arab, Jumeirah Beach, and Emirates’ Towers hotels. Additionally, it owns the Wild Wadi theme park, a hospitality academy, various restaurants, and a wellness brand (Jumeirah 2019). Second, SOHC ICD owns the iconic Palm Atlantis Resort with in-house entertainment attractions and a theme park. Furthermore, it owns ‘Golf in Dubai’, which hosts international golf tournaments, and finally, the resort developer and operator Kerzner. In the domain of retail, the

⁸ Sources: the Dubai Economic Report 2018 (2019, 72), Henderson (2006, 93), Vardhan (2008, 248-249) and al Ameri (2013, 253).

ICD owns airport retailer ‘Dubai Duty Free’, and supermarket chain Aswaaq, plus other subsidiaries involved in software, dairy and poultry, and beverages (ICD 2019).

Events Tourism Cluster

The DTCM embraced the events cluster as an important pillar of Dubai’s tourism development. The expansion of the events market has contributed to attracting business and leisure travelers year-round. Dubai seeks to consolidate its reputation as business and leisure destination through raising additional demand for its tourism assets through hosting diverse events. The decision to create a rich event environment aided in encouraging various international airlines to (re)route flights to Dubai (Government of Dubai 2019, 70-71). Janiskee (1980) conceptualizes an event as: “formal periods or programs of pleasurable activities having a festive character and celebrating some concept, happening or fact” (quoted in Sutton 2016, 356).

Currently, Dubai is preparing for the World Expo 2020-2021 mega-event. Based on the success of previous World Expos in e.g. Milan and Shanghai, it is estimated Dubai will attract substantial FDI, global press attention, and millions of tourists. Sutton argues, Dubai has four major event types: first, Shopping and Cultural Festivals – which are organized to boost sales; second, Sporting Events – which contribute to Dubai’s leisure identity; third, BTMICE⁹ Events – which serve Dubai’s ambition to become a global business hub; and fourth, Media and Celebrity Events – which contribute to Dubai’s luxurious reputation and prestige. All four event types help Dubai to reduce seasonality and spread tourists over the year. A selection of events in Dubai can be found in figure 7 (Sutton 2016, 359-363; Sharpley 2008, 22).

Event Type	Examples of Events	Examples Luxury and Prestigious Brands
Shopping and Cultural Events	<i>Dubai Shopping Festival, Dubai Summer Surprise, Eid in Dubai, Global Village and Dubai Food Festival</i>	<i>Emirates Airlines, Jumeirah Hotels and Resorts, Hyatt, Hilton, Sheraton, Marriott, Armani, Emaar, Nakheel,</i>
Sporting Events	<i>Dubai Tennis Championships, Dubai Classic Golf Championships, Dubai World Cup Racing Carnival (Horseracing), Dubai Marathon and Dubai IRB Rugby 7's</i>	<i>Reuters, IMF, World Bank, Microsoft, Cisco, Real Madrid CF, Manchester City FC, Adidas, Roberto Cavalli, Guess, Apple, David Beckham, and Samsung,</i>
International BTMICE Events	<i>Dubai International Boat Show, Cityscape Global, GITEX Technology Week, Gulfood Exhibition and INDEX 2017</i>	<i>Coca-Cola, Arsenal FC, Carrefour, Gucci, Chanel, Cartier, Ralph Lauren, Christian Louboutin, Dior, Prada and Philips</i>
Media and Celebrity Events	<i>Dubai International Jazz Festival, Dubai International Film Festival and Art Dubai</i>	

Figure 7: Examples of events and luxury brands in Dubai¹⁰

⁹ BTMICE stands for Business Travel, Meetings, Incentives, Conferences, and Exhibitions. The BTMICE market involves a form of business tourism where large groups of visitors are assembled for a particular purpose usually focused on a theme or topic (quoted in The Dubai Government 2019, 71).

¹⁰ Sources: Sutton 2016, 359-363; Government of Dubai 2019, 71-72; The Dubai Mall 2019

5.5.2. Destination branding

Destination branding and marketing has been important to raise demand for Dubai's tourism cluster. A strong destination brand is important, because it provides potential visitors destination information which could prompt them to visit. Dubai has done well, considering it occupies rank 19 out of 118 in the 'Country Brand Index' of 2014-2015 (FutureBrand 2018). Destination branding is partially related to the concept of 'soft power', i.e. "the ability to affect others (...) [persuade], and eliciting positive attraction [through ideas and values] in order to obtain preferred outcomes" (quoted in Nye 2011, 21; Van Ham 2008, 131). Destination branding can be defined as: "an effort to use strategies developed in the commercial sector to manage, if not necessarily wield, the soft power of a geographical location" (quoted in Van Ham 2008, 127). The DTCM is in charge of Dubai's destination branding campaign and operates to enhance the city-state's 'tourism destination demand', which denotes the amount of people willing to temporarily move away from their place of residence for tourism ends due to availability of a set of preferred goods and services (Al Ameri 2013, 110; Agarwal 2017; Lohmann et al. 2009, 205).

Qua story, Dubai presents itself as a former fishing village that transformed into a futurist cosmopolitan city-state in the desert at the crossroads between East and West. Despite impactful crises like 9/11, 2001, and the Great Recession of 2008-2009 Dubai managed to present itself as an economically and politically stable tourist destination free from terrorism, sectarianism, and conflict (Lawton and Weaver 2011, 163). The conventional year-round sun-sea-sand-safety image has been complemented with new identity characteristics of luxury, innovation, modernism, and iconographic grandeur. Consequently, Dubai evokes a destination image for leisure, sightseeing, shopping, and major events (Sutton 2016, 355-357; Balakrishnan 2008, 68-72).

The emirate uses famous brands and celebrities to grow its commerce and tourism clusters (see figure 7). The presence of famous brands provides tourists with symbols of recognition and trust. Moreover, Dubai uses these brands during low-season events, like the 'Dubai Summer Surprise', to raise demand in the hot summer months (Al Ameri 2013, 215-216; Balakrishnan 2008, 68-73, 82). Beside the DTCM's branding efforts, state-owned airlines and hotels are also involved as brand ambassadors (Government of Dubai 2019, 70-71; Balakrishnan 2008, 81). For example, from 2010 to 2014, Emirates spent over US\$100 million to sponsor the FIFA World Cup along big brands such as Sony and Coca-Cola. Furthermore, Emirates secured sponsorship contracts with renowned football clubs e.g. Real Madrid, Arsenal, and AC Milan. Strategic

sponsorships augmented Dubai's communication efforts regarding its tourism products. Particularly loyal fans contributed to the establishment of an appealing destination image, by associating the airline with their favorite teams and marketing Emirates' brand while wearing the club shirt (Ulrichsen 2016, 57-59).

5.5.3. Determining tourism's success

How effective has the government been in developing a tourism cluster? Dubai has been successful in its tourism cluster development. This claim is buttressed by the data in figure 4. In a time span of twenty-seven years, Dubai's annual visiting tourists have grown from 630,000 in 1990 to 15,790,000 in 2017, which signifies a 2506% growth. Dubai's supply of tourism accommodations has also steadily increased since 2001. Furthermore, the room occupancy rate oscillated around 78% during the period 2006-2018. The room occupancy was at its lowest in 2009 with 69.8%, when Dubai was hit by the financial crisis of 2008-2009. Whereas, it peaked in 2018 with 87.0%. This suggest Dubai's tourism sector has recovered from the financial crisis. Dubai's annual tourist arrivals have grown for a consecutive twenty-eight year period. Besides, as discussed earlier, the DTCM and the government have supplied the city-state with ample tourist attractions and icons, which have been aptly branded and marketed across the globe. From these data it can be inferred that Dubai has established itself as an effective tourism destination.

5.6 Conclusion

Following independence, Dubai's leadership was prompted to change the configuration of its economy as its oil supplies were depleting. In effect, Sheikh Mohammad embraced tourism as a primary pillar in Dubai's diversified economy. The data has shown Dubai's approach to tourism development has been effective and enables aggressive annual growth. This chapter demonstrated how Dubai's government has made use of two primary state-led policy factors, initiated top-down via the DEC and DTCM, to develop the tourism cluster out of nowhere.

First, Dubai adopted a VSCIS wherein SOEs and GREs occupy strategic positions along the tourism supply chain to engineer an array of efficient, unique tourism products and services in order to grow the city-state's tourism portfolio. The emirate's unique combination of dirigisme and ownership, through its SOHCs, allowed its ruling elite to steer a large segment of the economy's synergic primary clusters of commerce, events, real estate, tourism, and transport in line with the emirate's tourism vision. The state's efforts for the tourism cluster were complemented by transnational private sector companies.

The second and final policy factor entails, the effort of the DTCM and Dubai's brand ambassadors to develop a polished destination brand at home and abroad. Dubai has presented itself as a stable and safe tourist destination in a turbulent region. Beside the traditional offerings of sun, sea, and sand, Dubai has branded itself as a futurist and orientalist Mecca for events and shopping featuring the largest concentration of international brands. Moreover, the emirate makes use of brand ambassadors, which help in projecting Dubai's tourism brand increasingly further.

Chapter Six: Case Study: Tourism Development in Singapore

6.1 Introduction

The aim of this chapter is to examine the primary policy factors underlying successful tourism development in Singapore. The chapter starts with a brief overview. Consequently, five sub-questions will be discussed: first, in what historical context did the idea emerge to develop a tourism sector? Second, to what extent do government institutions contribute to the tourism development process and how do they relate to planning and executing policies? Third, what is the role of the commerce, events, real estate, and transport clusters in the development of tourism products and services? Fourth, how does the government tackle destination branding? Fifth and finally, how successful has the government been in tourism sector development? Afterwards, a conclusion will follow.

6.2 Overview

The Republic of Singapore is a sovereign city-state in Southeast Asia. In a time span of sixty years, it transformed from a declining British colony into a metropolis (Chua 2011, 29). Singapore is a parliamentary republic, it is not democratic nor authoritarian. The PAP has dominated administration since independence and has no substantial opposition threatening its rule in the state's unicameral parliamentary system (Henderson 2012, 70-71). From 1966 to 1999, Singapore experienced rapid economic development through its export-oriented entrepôt model. Manufacturing and service-provision constitute the economy's backbone and revolves around the clusters of commerce, transport, tourism and finance. Singapore is small and consists of merely 719.2 square kilometers, which makes land costly. Once a British crown colony from 1867 to 1959, it obtained internal self-rule afterwards, although the UK still managed foreign policy and defense until 1967. In 1963, Singapore joined Malaysia following a referendum. However, this was short-lasting. In 1965, it became independent from Malaysia, following irreconcilable political differences. During the transition from colony to self-rule, the PAP emerged headed by the visionary Lee family – which yielded two prime ministers (CIA – Singapore 2016).

6.3 Tourism development in a historical context

Singapore's independence in 1965 had major consequences for the state's economy. At its dawn, Singapore was devoid of land, labor, food, and capital – a productive economy's building blocks. Therefore, survival was questionable and the PAP turned to a discourse of surviving to deal with: racial riots, a feeble army, and an economic meltdown. Besides, the PAP had to reconfigure Singapore's developmental strategy. The loss of Singapore's hinterland Malaysia heavily damaged Singapore's economic prospects, because its leadership counted on Malaysia as Singapore's natural hinterland. In effect, under the leadership of Prime Minister Lee Kuan Yew (r. 1959-1990), Singapore transformed crisis into opportunity. Lee innovated Singapore's *entrepôt* model and implemented an export-oriented growth model viewing the world as its hinterland (Chua 2011, 29-31).

Tourism development was soon designated as a primary export product. However, artificial, natural, and cultural tourism amenities were lacking. Only few British colonial landmarks and mediocre natural sites were available. Therefore, Singapore's government decided to proactively build the tourism cluster and to transform from a transit hub into a tourist destination (Chye 2015, 10, 16). Following independence, Singapore was destitute and lacked the funds to modernize its transport infrastructure, and urban systems that provided housing and sustenance to its citizens and tourists. Government development budgets had to be complemented by FDI from advanced capitalist economies. Subsequently, the government started the process of innovating physical infrastructure serving the tourism sector's development. First, it created a state-led tourism agency, the Singapore Tourist Promotion Board (STPB) in 1964. The STPB emerged as the tourism sector's heart and became the main facilitator of public-private partnerships (Chye 2015, 1-11). In addition, the STPB was aided by the Economic Development Board (EDB) and the Jurong Town Corporation (JTC), which are fellow statutory boards under the MTI involved in urban development (Chye 2015, 15).

In the 1960s, the foundation of a tourism belt emerged with the opening of four luxury hotels. Diminishing air travel costs increased the influx of tourists, increasing demand for accommodation. Later, tourist attractions sprouted in the 1970s – the Jurong Bird Park opened in 1971, the Singapore Zoological Garden in 1973, the Singapore Handicraft Centre in 1976, and the Singapore Cultural Theatre in 1979. Also important, was the completion of the hybrid 'Merlion' statue and the placement of the 'Raffles' statue in 1972. Both became important branding icons

for Singapore. Finally, the offshore island Sentosa was designated as a zone for tourism industry development for the coming decades. In the 1980s, the new Changi airport in combination with the rise of Singapore Airlines created the foundation for an intercontinental transport hub. Concurrently, the Tourism Product Development Plan, worth S\$1 billion, was launched by the STPB in 1986 to revitalize natural assets and bolster the authenticity of historic colonial districts (Henderson 2014, 86; Chye 2015, 15-29).

In the 1990s, Singapore successfully established its tourism industry and emitted an image of a well-developed, green, and oriental destination with a unique conflation between heritage and modernity. Urban developers continued to focus on augmenting existing attractions. In 1996, the STPB launched the Tourism 21 plan with a budget of S\$600 million predominantly focused on BTMICE events to increase the range of amenities. Tourism 21 envisioned Singapore to become a primary global tourism destination on which the government expanded following the turn of the millennium (Chye 2015, 57, 63). To conclude, this section has demonstrated Singapore's motive to develop a tourism industry and how the Singaporean government consolidated its tourism from the 1970s to 1990s.

6.4 State capitalism

Singapore's political system is headed by Prime Minister Lee Hsien Loong (r. 2004-2018). Lee is the eldest son of the late Prime Minister Lee Kuan Yew – Singapore's founding father. The system is a product of a historical nationalist discourse of survival and pragmatism, shaped in an anti-communist Cold War context. This allowed the PAP to eliminate all opposition and enabled an authoritarian capitalist course free from public pressures. This course has been marked by strict regulation of economic and political projects supervised by financially incorruptible PAP ministers and technocrats (Chua 2011, 30, 34).

Through aggressive gerrymandering, the PAP succeeded in generating a persisting unicameral majority and retained power. Pundits label its governance style as top-down paternalism with a concentrated leadership (Henderson 2014, 84). In effect, the PAP effectively forged an organization of statutory bodies and ministries that oversee the development of different economic sectors. The principles of communitarian democracy underline the PAP's rule i.e. serving the interests of the Singaporean nation instead of separate communities (Chua 2017, 7). Singapore's developmental government pursued long-term developmental plans without

disruptions aimed at export-oriented growth. The government took a bifurcated approach to developing the economy. First, it made use of FDI-driven development through public-private partnerships with multinationals from advanced capitalist economies to attract capital and know-how. Second, the government used its political power to claim natural monopolies, and control primary strategic clusters in the economy via GREs and SOEs, controlled through its SOHC

Temasek Holding – owned by the MoF (Chua 2017, 98-99; Koh 2017, 92-93).

Temasek, founded in 1974, operates as an investment arm network of local and international corporate commercial GREs¹¹ and SOEs with interlocking boards of directors. The SOHC serves as the government’s visible hand in the local economy and either holds a stake in a company or fully owns it, depending on the strategic importance of the enterprise. Interestingly, the company boards are represented by at least one government technocrat to

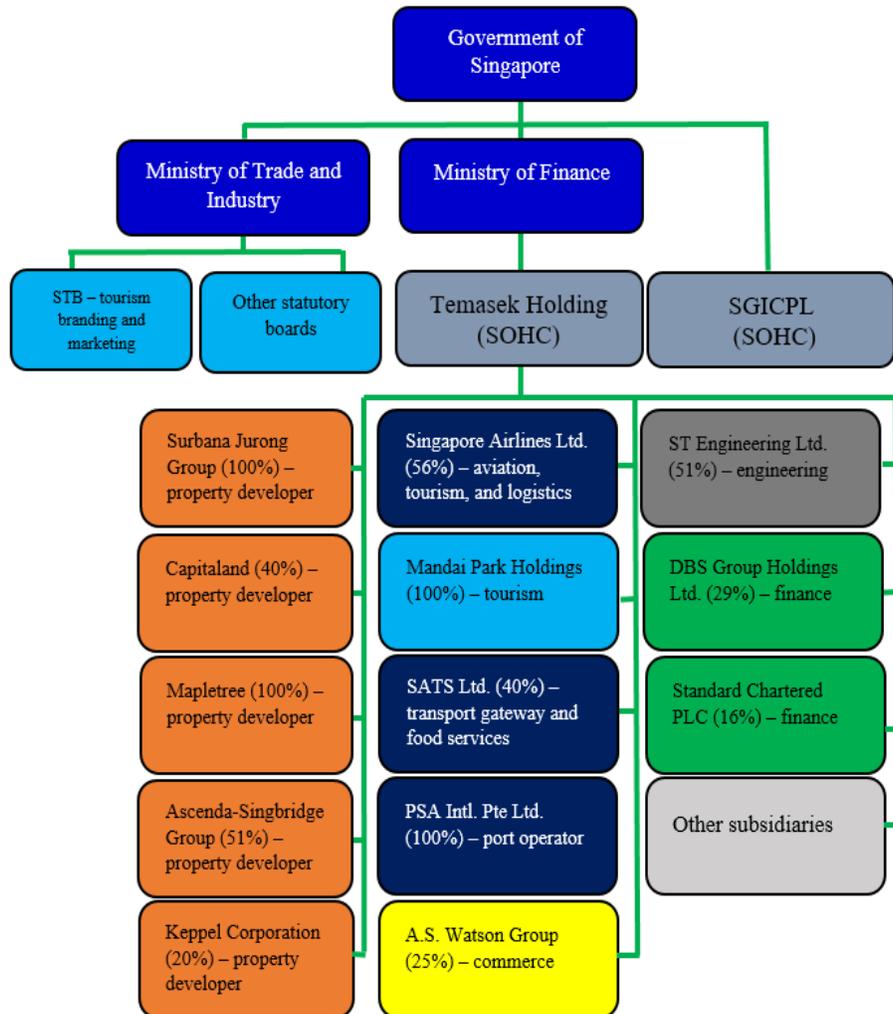


Figure 8: Singapore’s primary institutions, SOHCs, and subsidiaries for tourism cluster development

ensure the company operates in line with the overarching developmental vision (Sim, Thomson, and Yeong 2014, 23; Carney 2014, 18; Pereira 2008, 1193; Chen 2016, 317). Moreover, Temasek’s operations are financed by GRE profits obtained from dividends, interest, and rentals

¹¹ The concept of GRE illustrates the Singaporean government’s intention to maintain control over the direction of an enterprise without over intervention (Chen 2016, 319). Moreover, the percentage in the figure displays the government’s shares in the enterprise.

(Carney 2014, 18). SOEs' primary objective was to serve Singapore's society. Nevertheless, they complemented that objective with becoming profit-making enterprises, disciplined by market forces that operate in the global economy and in line with the government's developmental visions. Besides, Temasek facilitated close coordination between GREs and SOEs enabling state dirigisme (Chua 2017, 111-117). Nevertheless, in the past decades, the government has worked on scaling back state intervention in businesses (Koh 2017, 93).

Temasek's board of directors is appointed or removed with the consent of Singapore's President. This is to ensure the board fares the right developmentalist course. The board comprises Singaporean and non-Singaporean technocrats, which facilitates a commercial focus regarding decision-taking on investment, divestments, or other decisions. However interestingly, Temasek's CEO is Ho Ching – the wife of Prime Minister Lee. Therefore it remains unclear what informal business-government relations exist (Chen 2016, 322). Singapore also possesses a second SOHC, the Singapore Government Investment Corporation Private Limited (SGICPL), founded in 1981. The SGICPL is purely a sovereign wealth fund and manages assets and foreign reserves under the supervision of Prime Minister Lee (Chen 2016, 312). Singapore's SOHCs contribute saliently to the national treasury, prevents intervention by foreign financial institutions, and protects the Singapore currency from speculative attacks. The government also deployed land acquisition laws to acquire land cheaply and consequently uses it for constructing key industrial infrastructure. The control over the economy and land has substantially contributed to Singapore's success (Henderson 2014, 85; Chua 2011, 30, 35; Chua 2016, 508-509; Chua 2017, 1-7, 98-102).

6.4.1 State-led tourism development

Singapore's government operates a VSCIS to develop its tourism industry (see figure 9). The government does this through: primarily the STB and aided by other statutory boards under the MTI; Temasek's subsidiaries; and in cooperation with the private sector. Through partnerships, the government orchestrates resource coordination in order to create streamlined tourism products and services complying with the STB's vision. Moreover, Singapore's tourism cluster is inextricably linked with the events, real estate, and transport clusters, which play an essential role in its success.



Figure 9: Singapore's VSCIS¹²

State-led tourism development in Singapore started with the establishment of the STPB in 1964. In 1997, the agency was renamed in the Singapore Tourism Board (STB) and received a broader mandate than its predecessor. The STB is a statutory board under the MTI (STB 2014, 6, 30). In Singapore, the STB stands at the heart of the tourism cluster development and aims at transforming and presenting Singapore as an excellent destination for business, leisure, investments, education, and healthcare services (STB 2005, 15). The body's primary responsibility

¹² Visualization of Singapore's VSCIS. The information has been gathered from the STB's Annual Reports (2004-2018). The information in the boxes is no attempt to delimit cluster activity and merely serves as examples of a larger phenomenon.

is the development of tourism assets and facilitating destination branding. Additionally, the STB advises the government on travel and tourism affairs; attempts to enhance tourism's share in GDP; manages tourism-related assets, creates regulations and issues licenses, and pursues tourism visions (STB 2005, 3, 24; STB 2014; 7, 27).

In the STB's attempt to build tourism assets, it closely cooperates and coordinates with: various government statutory boards, GREs and SOEs, and private sector enterprises. By bundling economic and institutional resources, under the tutelage of the STB, the government seeks to guide tourism cluster development (Ooi 2002, 701). The STB engages in close cooperation with the: National Heritage Board, Urban Renewal Authority (URA), Ministry of Defense, Changi Airport, EDB, Sentosa Development Corporation, JTC, and other agencies to develop the tourism cluster (Ooi 2002, 698-701; Ooi 2005, 255). In regard to cooperation with GREs and SOEs, the STB cooperates with Temasek entities like Singapore Airlines, theme park operator Mandai Holdings, and SATS Ltd. (Teo and Chang 2000, 120; Straits Times 2014; SATS 2011). The STB, and public and private sector stakeholders aim to reshape and innovate Singapore's tourism landscape together (STB 2005, 5). Although, the STB instigates development and conservation initiatives, which makes the private sector reliant. Therefore, private sector companies e.g. developers, retailers and attraction operators have to abide by the STB's tourism vision to become eligible for benefits like financial and marketing support (Ooi 2002, 701).

Worldwide, the STB owns 21 regional offices and five marketing representations to showcase Singapore (STB 2018, 17). The offices are grouped in seven regions: the Americas; ASEAN islands & Oceania; ASEAN Mainland; Europe; Greater China; North Asia; and South Asia Middle East and Africa (STB 2013a, 16; STB 2014, 19). These offices serve to lever best practices and knowledge from abroad to optimize Singapore's tourism industry and capabilities (STB 2013a, 51). This section has demonstrated that the STB operates as the core of the tourism cluster in Singapore. It is in charge of tourism portfolio development as well as branding and marketing.

6.5 Primary policy factors behind building a successful tourism industry

The section below will discuss the development of tourism products and services, the government's role in destination branding, and will evaluate how successful the government has been in tourism cluster development.

6.5.1 Providing amenities for the tourism cluster

Former MTI minister Lim Hng Kiang asserted:” the more attractive [Singapore is as a tourist destination], the easier it is for us to develop our [BTMICE] industry and [Aviation cluster] (quoted in Chye 2015, 70). The commerce, real estate, tourist, and transport clusters are inextricably linked. This characteristic supports the STB’s objectives and enables the provision of incentives to attract tourist visitors (Lohman 2009, 205, Ooi 2005, 251). This section will discuss the supply-side policies implemented by Singapore’s government in the context of a VSCIS.

Transport Cluster

Singapore holds a strategic location along air and shipping routes. The government’s provision of air, sea, and land transport infrastructure aided Singapore in receiving increased numbers of annual tourists. Regarding cruise ship tourism, Singapore aspires to become a hub in Southeast Asia. The city-state’s strong air connectivity, favorable tropical climate, and the availability of tourism assets in adjacent countries augmented its market position. In 1991, it opened the Singapore Cruise Centre with the capacity to berth two cruise ships. Singapore doubled the city-state’s capacity by opening the Marina Bay Cruise Centre in 2012 (STB 2013a, 37; STB 2015c, 9-10). In 2018, Singapore received 2,057,045 tourists via sea, which is 11.12% of total visiting tourists.

Regarding aviation, the inauguration of Changi International Airport in 1981 was instrumental for becoming a primary tourist destination. Moreover, the transport cluster was transformed into an essential element in Singapore’s development strategy. Over the past decades, multiple expansions took place enhancing the airport’s maximum annual capacity. In 1990, the airport had a capacity of 58 million, whereas in 2018, this rose to 85 million annual passengers (Chye 2015, 23-24; Changi Airport Group 2011, 16; Changi Airport Group 2018, 8-13). Changi Airport currently operates approximately 100 airlines to over 400 cities worldwide. Thus, its infrastructure helped Singapore to become an accessible tourism destination (Lohmann 2008, 205).

The role of the Singapore Airlines Group (SIA), owned for 56% by the government, should not be underestimated. The conglomerate owns multiple airlines, an engineering company, and a tours and travel arm. Singapore Airlines operates a fleet of modern planes e.g. A380s, B777, and B787s. In 1999, the airline operated 82 planes and flew to 68 destination cities. By 2018, it operated 107 planes although scaled down operations to 62 destination cities. The data illuminate

a correlation between increasing annual tourist visitors and fleet size during the period 1999-2018 (see figure 10). Besides, SIA owns two budget airlines SilkAir and Scoot that operate flights to 40+ destinations in the Asia-Pacific region. Therefore, SIA helped the government in establishing the transport-tourism nexus and makes a substantial contribution in being the metaphorical jetway to Singapore.

Years	Visiting Tourists (millions)	Total Available Hotel Rooms	Room Occupancy Rate (%)	Number of Hotels	SIA Fleet Size	SIA Destination Cities	Total Passenger Demand (millions)	Tourism Receipts (S\$ Billions)
1990	5.32	n/a	n/a	n/a	n/a	n/a	n/a	n/a
1991	5.41	n/a	n/a	n/a	n/a	n/a	n/a	n/a
1992	5.99	n/a	n/a	n/a	n/a	n/a	n/a	n/a
1993	6.43	n/a	n/a	n/a	n/a	n/a	n/a	n/a
1994	6.9	n/a	n/a	n/a	n/a	n/a	n/a	n/a
1995	7.14	n/a	n/a	n/a	n/a	n/a	n/a	n/a
1996	7.29	n/a	n/a	n/a	n/a	n/a	n/a	n/a
1997	7.2	n/a	n/a	n/a	n/a	n/a	n/a	n/a
1998	6.24	n/a	n/a	n/a	n/a	n/a	n/a	n/a
1999	6.96	n/a	n/a	n/a	82	68	n/a	n/a
2000	7.69	n/a	83	n/a	84	69	n/a	10.0
2001	7.52	n/a	76	n/a	84	67	n/a	9.1
2002	7.57	n/a	74	n/a	92	64	n/a	8.8
2003	6.13	29,917	67	99	96	60	n/a	6.9
2004	8.33	30,300	81	102	85	56	n/a	9.8
2005	8.9	30,445	84	103	89	59	n/a	10.9
2006	9.7	30,686	85	103	90	62	33.19	12.4
2007	10.3	30,087	87	98	94	64	35.54	14.1
2008	10.1	32,000	81	108	98	65	37.29	15.2
2009	9.7	33,880	76	117	103	66	36.91	12.8
2010	11.6	40,759	85	154	108	68	38.61	18.9
2011	13.2	42,674	85	163	108	64	42.98	22.3
2012	14.4	44,037	86	178	100	63	47.95	23.0
2013	15.6	47,113	85	197	101	63	51.94	23.5
2014	15.1	50,676	84	220	103	62	53.87	23.6
2015	15.2	52,552	84	223	105	60	53.97	21.7
2016	16.4	63,850	83	237	102	60	56.74	25.7
2017	17.4	67,084	85	246	106	61	59.37	26.8
2018	18.5	n/a	n/a	n/a	107	62	62.97	n/a

Figure 10: Singapore's tourism cluster performance indicators¹³

Real Estate Cluster

The real estate market plays a critical role in complementing the transport sector's efforts to make Singapore an appealing tourism destination. Singapore is home to many public and private real estate companies that are disciplined by market forces, and contribute to the creation of tourism accommodation and attractions. The government owns the majority of Singapore's land,

¹³ The 'Visiting Tourists', 'Total Available Hotel Rooms', 'Room Occupancy Rate', 'Number of Hotels', and 'Tourism Receipts' columns are based on data from Henderson (2007, 36) for 1990-2004, the annual reports by the STB (2005-2018), and the annual tourism statistics reports by the STB (2007, 2011, 2015, and 2017). 'SIA Fleet Size' and 'SIA Destination Cities' columns are based on Singapore Airlines annual reports (2000-2018). The column on 'Total Passenger Demand' is based on data from the annual reports of the Changi Airport Group (2010, 2014, and 2018).

approximately 85%, which substantially fills the treasury via land leases and sales. Subsequently, it invests GREs' revenues back into urban development (Shatkin 2014, 122). Beside land speculation, the government has two additional instruments: first, it uses GREs and multinationals to realize urban development objectives and to engineer different industries; and second, it holds stakes in real-estate financing enterprises such as DBS Bank and Standard Chartered – 29% and 16% respectively (see figure 8). The government's dominance in the land market was the result of the 1966 Land Acquisition Act, which allowed the government to take over land quickly for the national interest at a fraction of the market price (Shatkin 2014, 116-122).

The government always searches for opportunities and drives innovation in the tourism industry by letting private and public companies compete for tenders (Haila 2016, 143). This was evident with the construction of the iconic integrated gambling resorts i.e. Marina Bay Sands and World Resorts Sentosa; and the 'Singapore Flyer', a giant observation wheel, by private sector firms (Henderson 2016, 195; Henderson 2014, 86). For decades, gambling was forbidden by law. However, hampering tourism growth persuaded the government to legalize gambling as a tourism incentive (Shatkin 2014, 130). The real estate sector's contribution to tourism growth manifests by the increase in hotel rooms and hotels. There is a correlation between the growing real estate sector and increasing annual tourist visitors in the period 2003-2018. Available hotel rooms went up from 29,917 in 2003 to 67,084 in 2017 – a 231% increase. Additionally, the number of hotels rose from 99 in 2003 to 246 in 2017, which is a 248.5% increase (see figure 10).

Singapore's government influences a majority segment of the commercial property market through its GREs. CapitaLand and Keppel Corporation, Singapore's largest and second-largest property developers, are influenced through stakes 40% and 20% respectively (see figure 8). Deploying GREs has been relevant for the provision of tourism assets in Singapore. To illustrate, CapitaLand owns and manages fifteen large malls, like 'Junction 8', 'Bugis Junction', and 'Westgate', that serve as major venues for either shopping, sports, entertainment, accommodation, dining, BTMICE events, and medical treatment (CapitaLand Mall Trust 2019). Additionally, it also has a portfolio of multiple skyscrapers offering either office space, hotels, or residence – like the 'Raffles City' project (Capitaland Commercial Trust 2019). Keppel Corporation has specialized in residential urban planning and waterfront development (Keppel Corporation 2019).

Additionally, the government also has a hand in the redevelopment of Singapore's cultural, natural, and heritage tourism assets. For instance, the government fully owns the Singapore Zoo,

Night Safari, and River Safari through the Mandai Park Holdings. Moreover, it orchestrated the construction of the Esplanade Theaters and the renovation of the city-states ethnic enclaves i.e. Chinatown, the Malay cultural district, and Kampong Glam (Shatkin 2014, 131).

Thus, the government managed to steer the development of an array of tourism amenities through stakes in GREs and SOEs, and in cooperation with the private sector. Consequently, a portfolio of tourism accommodations and attractions emerged underlining Singapore's as a primary tourism destination.

Commerce Cluster

The commerce cluster overlaps with the tourism cluster. Tourism revenues have grown from S\$10.0 billion in 2000 to S\$26.8 billion in 2017 (see figure 10). For the year 2017, total tourism revenues comprised the following components: 29% shopping, 28% accommodation, 13% food and beverages, and 30% by other components (STB 2018, 40). Interestingly, public sector companies are not widely represented in the commerce cluster (see figure 9). In the food industry, Temasek's SATS Ltd. plays an important role. SATS provides food and catering services across different economic sectors. Regarding entertainment, Temasek owns theme park operator Mandai Holdings. Additionally, Temasek has no significant investments in the shopping and accommodation sectors except for a small 25% stake in health and beauty retailer A.S. Watson Group. Instead, the private sector is primarily responsible for developing shops, hotels, restaurants, and entertainment amenities (see figure 11). Despite the government's relative absence in this part of the economy through GREs and SOEs, the role of the government should not be underestimated (Chye 2015, 75-79, 94).

The government exercises influence institutionally through the STB. For example, it extended opening hours for retail businesses and provided departing tourists a 7% Goods and Services Tax refund incentive, which stimulates retail. Also, the STB's efforts to develop new tourist attractions e.g. the integrated gambling resorts and the Singapore Flyer went concurrently with the development of commerce spaces operated by private sector companies. Moreover, the STB and URA were also involved in renovating Orchard Road, which is Singapore's most renowned shopping and entertainment district. This area is home to numerous malls, restaurants, and cafes (Henderson et. al. 2011, 41-42; Chye 2015, 75-79).

Like many Asian destinations, Singapore presents itself as a shopping hub. Singapore’s government aspires to earn more through increased tourist spending. Luxury retailers with well-known brands are attracted to realize this ambition (see figure 12) (Henderson et al. 2011, 43).

Type of Tourism	Examples of Supplied Facilities
Commercial	<i>Jurong Bird Park, Orchard Road, Resorts World Sentosa, Marina Bay Sands, Clark Quay, ION Orchard, Orchard Central, Universal Studios Singapore, Sands SkyPark, Singapore Cable Car, Singapore Zoological Gardens, Changi Airport, River Safari and Singapore Flyer</i>
Business	<i>Changi Airport, Resorts World Sentosa and Marina Bay Sands</i>
Sports	<i>Grand Prix of Singapore and Singapore Sports Hub</i>
Medical	<i>Farrer Park Hospital</i>
Culture and Heritage	<i>China Town, Little India, Kampong Glam, Esplanade Theaters, Merlion Statue, Raffles Landing Site, Raffles Hotel, Fort Canning, Orchard Road, Gardens by the Bay and Haw Par Villa</i>

Figure 11: Tourism facilities across Singapore's tourism cluster

Events Tourism Cluster

Singapore’s government has invested substantially in developing its events sector. The STB sees events as an instrument to reduce seasonality and enhance year-around revenues. In effect, Singapore was named ‘top convention and meeting city’ by the International Congress and Convention Association over 10 times from 2000-2019. Lim and Zhu inferred the BTMICE sector positively influences Singapore’s tourism demand (2018, 847, 852-853).

During the first half of 2018, 15% of tourist visitors and 22% of spending was ascribed to the events industry (Straits Times 2018). Literature on Singapore’s events industry is close to nonexistent. Sutton’s (2016) Dubai events typology is also convenient for analyzing events in Singapore. The author compiled a list of events per classification (see figure 12) (Sutton 2016, 359-363).

Event Type	Examples of Events	Examples of Luxury and Prestigious Brands
Shopping and Cultural Events	<i>The Great Singapore Sale, Singapore Arts Festival, Singapore Food Festival, Christmas in the Tropics, Deepavali, Hari Raya Puasa, Mid-Autumn Festival, Chinese New Year, ZoukOut, Singapore River Festival and Late Night Shopping</i>	<i>Singapore Airlines, Steve Madden, DSquared2, Bershka, Li Ning, H&M, Abercrombie & Fitch, Marriot, Shangri-La,</i>
Sporting Events	<i>Singapore Grand Prix, World Cyber Games Asian Championship, Stopover Volvo Ocean Race, Youth Olympic Games, UFC Fight Night, International Champions Cup Singapore and HSBC Golf Women's Golf Championship</i>	<i>Hilton, Carlton, Ramada, Holiday Inn, Ibis, Mercure, Ascott, Oasia, Novotel, Chanel,</i>
International BTMICE Events	<i>117th Session International Olympic Committee, Singapore Medicine Forum, World Bank and IMF Meetings, ASEAN Committee Meetings, BioMedical Asia, Budget & Economy Hotels Asia., International Luxury Travel Market Asia Pacific 2018 and Jewehuxe Singapore</i>	<i>Dior, Bvlgari, Guess, Mango, Adidas, Sephora, Cartier, Omega, Rolex, Nespresso, Haagen-Dazs, Starbucks,</i>
Media and Celebrity Events	<i>Asia Fashion Exchange, Singapore Fashion Festival Bollywood movies: 'Krrish', 'De Dana Dan' and 'Badrinath Ki Dulhania', 'Dear Zindagi', Hollywood: 'Pirates of the Caribbean: At World's End' and 'Crazy Rich Asians'</i>	<i>Godiva, DBS, American Express and Crowne Plaza</i>

Figure 12: Examples of events and luxury brands in Singapore¹⁴

6.5.2. Destination branding

In Singapore, tourism marketing and soft power generation are orchestrated by the STB, with the intention to shape tourists' awareness and experiences (Henderson 2012, 76-77). Over the past decades, the STB continued to repackage destination promotion in various branding campaigns. Despite substantial regional political and economic setbacks, it managed to exert an appealing image of Singapore (Ooi 2004, 245-246, 253). This claim is bolstered by Singapore's rank in the 'Country Brand Index' of 2014-2015, wherein it scored rank 14 out of 118 countries (FutureBrand 2018). The STB frames Singapore as the destination for business, education, healthcare, leisure, and events (Henderson 2012, 77). Moreover it emphasizes its role as transport-tourism hub, intercontinental gateway between East and West, and the tourism capital of Southeast Asia in cooperation with other ASEAN states (Ooi 2004, 247-249).

Since the 1990s, the STB launched several pinpointed marketing campaigns. In 1996, the vision 'New Asia' was launched and presented Singapore as a: Asian melting pot, multicultural, authentic yet modern, tropical, stable city-state. Furthermore, tourists and business investors were attracted by the state's stability and its clean and green 'City in a Garden' narrative. Interesting was the transnational essence of this campaign. The STB did not present Singapore as a stand-alone destination due to Singapore's spatial restrictions and lack of nature assets. Tourists were suggested to complement their trips in adjacent countries (Ooi 2004, 243-251; Koh 2017, 71). In 2005, 'Uniquely Singapore' introduced the importance of individual tourist experiences. In 2010, 'YourSingapore' further elaborated on the importance of visitor-centricity in a social media

¹⁴ Sources: STB Annual Reports (2005-2018);

context. Moreover, the STB created separate custom-made marketing campaigns aimed at unique markets (Henderson 2007a, 266; STB 2014, 39-40). The contemporary marketing strategy was launched in 2017 under the name 'Passion Made Possible'. This strategy further focuses on visitor-centricity embedded in a context of international and social media usage, and industry partnerships (STB 2018, 43).

In addition, Singapore uses big brands as instruments to profile Singapore as a tourism hub on the international level (STB 2011, 44). The STB has contracted various brand ambassadors to help with destination branding over the years. The most important has been Singapore Airlines' strategic depiction of flight attendants known as the 'Singapore Girl' since 1972. This icon helped to acquaint the potential tourist with Singapore's values and culture. Furthermore, the STB has also contracted Emirates for promoting Singapore among Middle Eastern travelers, hotel rating website TripAdvisor, and the Changi Airport Group (STB 2014, 43-44; STB 2018, 45).

6.5.3. Determining tourism's success

Singapore has been successful in its tourism cluster development. This claim is supported by the data in figure 10. They show that four slumps occurred in the amount of annual tourism visitors from 1990 to 2018. This is due to various events that damaged the tourism sector beyond the government's control. First, the Asian Financial Crisis of 1997-1998 saw the amount of visitors fall from 7.29 million in 1996 to 6.24 million visitors in 1998. Besides, annual tourist visitors from 1993 to 2002 fluctuated slow-moving between 6.5 and 7.5 million due to increased regional competition (Chye 2015, 69). Second, in 2003 Singapore was hit by severe acute respiratory syndrome (SARS), affected negatively by the aftermath of the 9/11, 2001 terrorist attacks in the US, the US-led War on Terror, and the Bali Bombings in 2002 (Ooi 2004, 243). Third, the Great Recession of 2007-2008 damaged Singapore's tourism industry. This event saw 10.3 million annual tourist visitors in 2007 fall to 9.7 million in 2009.

Fourth and finally, the last drop in annual tourist visitors occurred in 2014. Annual tourist visitors fell from 15.6 million in 2013 to 15.1 in 2014. This is ascribed to three plane crashes of regional airlines, namely: MH17; MH370; and Indonesia AirAsia 8501. Despite these four slumps over the period from 1990 to 2017, annual tourist visitors has increased from 5.32 to 17.4 million, which denotes a salient increase of 327%. Annual tourism receipts also grew from S\$10 billion to S\$ 26.8 billion, which is an outstanding increase of 268 percent. Furthermore, Singapore's supply

of tourism accommodations has also steadily increased as showed above with the total available hotel rooms and the number of hotels. The room occupancy rate oscillated around 81.7% during the period 2000-2017. Moreover, the room occupancy was at its lowest in 2003 with 67%, when Singapore was hit by the SARS epidemic. Whereas, the peak was in 2007 with 87.0%. To sum up, Singapore's tourism cluster managed to expand by taking in more annual tourist visitors and receiving higher annual receipts. The STB, in coordination with public and private sector, and other state agencies, orchestrated the provision of new tourist attractions and a successful branding and marketing campaign which attracted tourists from all directions. The data have shown Singapore continues to be a lively tourist destination.

6.6 Conclusion

Following independence, Singapore's economy was vulnerable and destitute. Nevertheless, Prime Minister Lee Kuan Yew rapidly spurred economic development by introducing an export-oriented growth model, wherein tourism was designated as a primary pillar. The data has shown Singapore's approach to tourism development has been successful, however miscellaneous transnational threats make the cluster prone to setbacks. This chapter demonstrated how Singapore's government has made use of two primary state-led policy factors, initiated top-down via the MTI's STB and the MoF's SOHC Temasek, to develop the tourism cluster from scratch.

First, Singapore adopted a VSCIS wherein SOEs and GREs occupy strategic positions along the tourism supply chain in order to create and expand Singapore's innovative tourism portfolio. Singapore's SOHC Temasek, facilitated the PAP elite's control over a large part of the economy's synergic primary cluster of events, real estate, tourism, and transport. Moreover, private sector enterprises complemented the state's efforts, especially in the commerce cluster.

The second and final policy factor entails the efforts of the STB and Singapore's brand ambassadors in developing a sleek destination brand. Singapore organized multiple branding campaigns. In sum, the STB emphasized the city-state is a: melting pot of authentic and modern, a city in a garden, multicultural, and economically and politically stable. Moreover, Singapore makes use of brand ambassadors, which aid the STB in enhancing brand awareness internationally.

Conclusion and future research recommendations

This research critically examined tourism cluster development in the state capitalist economies of the Republic of Singapore and the Emirate of Dubai by answering the research question: What primary government policy factors explain the establishment of a successful tourism sector in the state-led economies of Dubai and Singapore in the period between 1990 and 2018? This study, espousing the developmental state paradigm, identified two primary policy factors, occurring in both polities, which account for the establishment of flourishing tourism industries.

First, both governments use a VSCIS wherein SOHCs acquire or nurture tourism-related SOEs or GREs, in the tourism supply chain, in order to enhance, optimize, and innovate the supply of products and services. In effect, iconic accommodations and attractions emerged, despite climatologic or spatial restrictions. Adhering to a VSCIS, empowers Dubai and Singapore to steer a large segment of both dirigiste economies in line with their developmental visions for tourism. Moreover, the DTCM and STB provided incentives to transnational private sector companies and facilitated public private partnerships to help the governments in realizing their objectives. Thus, control over government institutions and SOHCs' subsidiaries combined with private sector resources, facilitated the rapid development of state-of-the-art tourism infrastructure.

The author found tourism cluster development in both cases serves as a pillar in an overarching synergic state-led economic development strategy aimed at GDP growth. The author attempted to illuminate that both governments seek to influence control over enterprises within the commerce, events, real estate, and transport clusters to help develop the tourism cluster. Control over the transport cluster influences the influx of tourist; control over the real estate cluster influences the supply of accommodations and attractions; and control over commerce and events influences the supply of amenities. This theory was demonstrated by discussing the government institutions and SOHC subsidiaries involved in tourism cluster development. Furthermore, the author sought to operationalize the various aspects of tourism cluster development by showing the correlations that exist between the synergic clusters.

Second and finally, Dubai and Singapore have invested substantial energy in generating soft power through an effective destination brand. Marketing campaigns exert an image of the city-states as: transcontinental aviation hubs, orientalist confluences of East and West, beacons of stability in precarious regions, and places of iconic man-made structures. The author found four coinciding characteristics: first, the DTCM and STB have created an effective domestic and

international institutional network promoting their destinations. Second, partnerships with tourism brand ambassadors were made to enhance the outreach of the brands. Third, well-established international brands have been concentrated in both metropolises to generate prestige. Fourth and finally, events tourism has been used to reduce seasonality, but also as a branding tool to market vibrant destinations.

The author endeavored to present a compelling analysis of state-led tourism cluster development. However, there were some limitations to this study: first, due to the authoritarian nature of the cases, access to data on ministerial decision-making is scarce; second, the vast nature of the tourism sector makes it impossible to discuss the role of every tourism-related enterprise; and third, this study neglected the federal influences of the UAE on tourism.

All things considered, this study has attempted to make an epistemological contribution to studying tourism in state-led economies from a political-economy perspective. Nevertheless, more research on this topic is required. Furthermore, this study has attempted to illustrate what can be achieved by politically and economically stable city-states that were initially devoid of artificial, cultural and natural tourism assets and therefore possesses policy-making significance for states and regions with similar political-economy configurations and ambitions.

Future research recommendations

International political economy literature on state-led tourism development is scarce. Initially, the author aspired to fill a gap in the literature to make a cross-case comparison. However, further in the research it became clear space for such an analysis is lacking. Comparing two successful models adequately is interesting for state's that seek to develop their tourism industries. This study provides a good starting point to facilitate research comparing the state-led tourism development models of Dubai and Singapore. Henderson's (2007, 33) suggestion to make use of Butler's (1980) 'tourism area life cycle model' would serve as a suitable conceptual framework. Henderson (2007) inferred Dubai and Singapore are in different stages of tourism development (2007, 42). The data compiled in figures 4 and 10 support this claim. Dubai's annual tourism visitors has grown successively since 1990, whereas in Singapore four slumps have occurred.

In addition, the author sought to establish the connections between on the one hand tourism and on the other transport, real estate, commerce, and events. Research linking transport to tourism is most developed e.g. Lohmann et al. (2009) and Douglas (2019), however information on the connection between tourism and the other clusters is almost nonexistent, especially in the case of Singapore. Information had to be derived from other disciplines and annual reports by tourism agencies. Therefore, research in this field can be advanced by researching the connections between clusters in pairs in order to see how they fit into an overarching synergic developmental strategy (see figures 3 and 9).

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