Integrated Tourism Complexes (ITCs) in the Sultanate of Oman: A Strategic Approach to Economic Diversification and Sustainable Development

The Sultanate of Oman is pursuing economic diversification by reducing its reliance on oil and promoting tourism as a key socio-economic alternative. Integrated Tourism Complexes (ITCs) are central to this strategy, offering comprehensive tourism experience and supporting sustainable development. ITCs are designated zones where foreign nationals may own a property, facilitating foreign investment and tourism growth. This study aims to assess the growth, benefits, and regional footprint of ITCs in the Sultanate of Oman. The study adopts secondary data analysis methodology. This allowed to comprehensively examine the long-term development of Omani ITCs over a twenty-year period, from the introduction of Royal Decree No. 12/2006 through to 2026. ITCs have become an integral part of Oman's strategy for development and tourism. They have the potential to assist in economic diversification, tourism employment generation, and attraction of local and foreign investments. Successful ITCs depend on the efficiency of their planning, regulation, integration with local communities, and management in terms of social, cultural, economic, and environmental impacts.

Keywords: *Integrated Tourism Complexes (ITCs), sustainable development, economic diversification, Oman, employment, tourism impacts.*

Introduction

Oman is renowned for its rich cultural heritage and distinctive natural landscapes, including mountains, deserts, and unspoiled coastlines. Since October 26, 2011, the country has been administratively divided into 11 governorates, each consisting of several Wilayats (Provinces) (See Table 1), as outlined by Majlis A'shura (2025) (Elected representatives of the public):

Table 1. *Governorates and Wilayats (Provinces) of Oman*

s/n	Governorate	Capital	Wilayats (Provinces)
1	Batinah North	Sohar	6 wilayats: Sohar, Shinas, Liwa, Saham, Al Khaburah, Al Suwaiq
2	Batinah South	Rustaq	6 wilayats: Rustaq, Al Awabi, Nakhal, Wadi Al Ma'awil, Barka, Al Musannah
3	Buraimi	Al Buraimi	3 wilayats: Al Buraimi, Mahdah, As Sunainah
4	Dakhiliyah	Nizwa	9 wilayats: Nizwa, Bahla, Manah, Al Hamra, Adam, Izki, Samail, Bidbid, Al Jabal Al Akhdar
5	Dhahirah	Ibri	3 wilayats: Ibri, Yanqul, Dhank
6	Dhofar	Salalah	10 wilayats: Salalah, Taqah, Mirbat, Rakhyut, Thumrait, Dhalkut, Al Mazyona, Muqshin, Shaleem and Al Halaniyat Islands, Sadah
7	Musandam	Khasab	4 wilayats: Khasab, Diba, Bukha, Madha

8	Muscat	Muscat	6 wilayats: Muscat, Mutrah, Al Amarat, Bawshar, Seeb, Qurayyat
9	Sharkeya North	Ibra	7 wilayats: Ibra, Mudhaibi, Bidiya, Al Qabil, Wadi Bani Khalid, Dema Wa Tayeen, Sinaw
10	Sharkeya South	Sur	5 wilayats: Sur, Al Kamil Wal Wafi, Jaalan Bani Bu Hassan, Jaalan Bani Bu Ali, Masirah
11	Wusta	Haima	4 wilayats: Haima, Mahout, Duqm, Al Jazer

Adapted from: Majlis A'shura (2025)

According to National Center for Statistics and Information (2025), the country's population in November 2025 is 5,355,718 people. Out of the total number of people in the country, Omani nationals comprise 56.6% (3,029,961 people) while expatriates make up 43.4% (2,325,757 people). The State of the World Population 2025 Report by United Nations Population Fund (UNFPA) shows that 24% of the population of the country is below 15 years while 21% of the population is between the ages of 10-24 years. People aged between 15-64 years make up 73% of the population. The above statistics suggest that the country has many working age people, but they imply continued challenge for the country in providing jobs (Ali et al., 2017; Atef & Al Balushi, 2017).

Youth unemployment continues to be an important labor market problem in Oman. While the unemployment rates seem to be low – ranging from 1.8% in 2018 up to 1.9% in 2021 and 3.3% in 2022 – such figures do not fully reflect the situation within the younger population. Unemployment rates in 2022 were as high as 15.8% for the 18-24 age group and 6.8% for the 25-29 age group. Gender disparity was significant – unemployment rate was 32.7% for young women in the 18-24 age group and 12.5% for young men in this age bracket, while unemployment rate for women and men aged 25-29 was 26.7% and 2.1% respectively (United Nations International Children's Emergency Fund (UNICEF), 2023; World Bank, 2025).

In this context, tourism is becoming increasingly regarded as one of the industries that can contribute to economic diversification and employment generation in Oman (Baum & Szivas, 2008; Pujol & Forster, 2007). The industry includes more than just hotels and resorts and incorporates activities such as food and beverage services, retail services, entertainment services, transportation services, tour operators, and many others (Leiper, 1990; Goeldner & Ritchie, 2012; Kasavana, 2013). From 2019 to March 2022, there have been 74 tourism-related activities in Oman (See Table 2).

Table 2. *Licensed Activities Categories Based on 2019 (End of December) till 2022 (End of March) Registerer*

Accommodation	Food and Beverage	Transportation	Retail Stores	Activities & Entertainment	
1. chalets and rest houses	**1.** bars	**1.** airport passenger land transport services	**1.** botanical gardens and flowers operation	**1.** acting activities	**16.** organizing sports events
2. green lodges	**2.** cafés that mainly serve drinks	**2.** in-city land transport of passengers (busses - scheduled)	**2.** operating and marketing duty free shops	**2.** activities of independent journalists	**17.** other activities for creative, arts and entertainment activities
3. guest houses	**3.** cafés that serve meals mainly	**3.** in-city rail transport of passengers	**3.** retail in specialized pottery and handicraft stores	**3.** beach buggy rental	**18.** other activities for other entertainment activities that are not classified elsewhere
4. heritage lodges	**4.** catering companies	**4.** land transport of passengers (buses - non-scheduled)	**4.** retail in specialized souvenir, antique and painting stores	**4.** bicycle rental	**19.** other activities for other sports activities
5. hotel apartments	**5.** fast food stores	**5.** marine transport of passengers (sea and coastal water transport)	**5.** retail in specialty silverware and gift stores	**5.** diving tool rental	**20.** rental of boats
6. hotels, motels and resorts	**6.** fish and seafood grill shops	**6.** marine transport of passengers (internal water transport)	**6.** retail in specialty stores for Omani daggers	**6.** entertainment and gaming city activities	**21.** rental of leisure and sports tools and equipment
7. other activities for camp areas and theme parks that offer a place	**7.** grilled meat shops	**7.** other activities for other types of land		**7.** entertainment games activities and electronic	**22.** stable activities

for cars and parks that offer a place for trailers		transport of passengers		simulation systems	
8. other activities for other accommodation facilities	**8.** ice cream shops	**8.** passenger air transport		**8.** hosting artistic bands	**23.** theme park and beach activities
9. other activities for short-term accommodation activities	**9.** juice shops	**9.** rental of land means of transport of goods (without driver)		**9.** medical coordination offices	**24.** ticket sales activities for entertainment events
10. tourist camps	**10.** other activities for beverage activities	**10.** rental of land means of transport of passengers (with driver)		**10.** mobile entertainment games activities	**25.** ticket sales activities for theatrical events
	11. other activities for other food service activities	**11.** rental of land means of transport of passengers (without driver)		**11.** motorcycle rental	**26.** tour operator activities
	12. other activities for restaurant activities and mobile food services	**12.** rental of mobile caravans		**12.** museums operation of all kinds	**27.** tourism promotion activities (marketing of domestic tourism)
	13. restaurants	**13.** transport of pilgrims		**13.** operation and preservation of historic sites and buildings	**28.** tourist adventures
	14. restaurants and canteens of public facilities			**14.** operation of ski lifts	**29.** travel agency activities
	15. selling corn			**15.** organizing parties	
	16. shisha café				
Total			**74**		

Adapted from: Ministry of Heritage and Tourism (2022); Al-Balushi & Atef (2024)

Despite its potential and importance to the Omani economy, tourism directly accounts for only 6% of jobs and remains dominated by expatriates (Al Nahdi, 2016). The industry is characterized by its ability to employ people of different educational levels and backgrounds, the establishment of a new hotel room created one direct and three indirect employment opportunities (Liu & Wall, 2006; MacFeely & O'Brien, 2009; Pan, 2015; Dorta-González & González-Betancor, 2021).

Based on 2021 data, the tourism sector workforce in Oman, comprising both Omani nationals and expatriates, totaled approximately 2.9% of the country's total population. However, the proportion of Omani citizens employed in tourism remains significantly low, nearly 0.5% of the total Omani population. A closer look at gender distribution reveals that 0.72% of Omani males are employed in tourism-related occupations, while only 0.28% of Omani females are engaged in this sector (Ministry of Heritage and Tourism, 2022; Al-Balushi & Atef, 2024).

To decrease the nation's dependence on expatriate employees, Oman has launched a strategic Omanization (Localization) policy. The policy focuses on preparing Omani citizens through education, and professional training to effectively join the employment market in key sectors. Its purpose is not only to replace non-national workforce, but to develop a capable Omani workforce that can support sustainable national development and strengthen the localization of strategic industries (Atef & Al Balushi, 2017).

Oman Tourism Strategy 2040 and Strategic Priorities

Oman Tourism Strategy 2040 was developed through collaborative efforts between THR Innovative Tourism Consultants and the Omani Ministry of Heritage and Tourism. This process engaged stakeholders across the Sultanate through discussions, interviews, and workshops, resulting in a comprehensive vision and actionable plan for the sector (THR Innovative Tourism Consultants, 2015).

Oman Vision 2040 recognizes that tourism is instrumental in transforming the country's economic resources decreasing oil dependency in the long run. The tourism strategy has set ambitious goals, which include receiving 11.7 million visitors by 2040. A significant increase compared to the number of tourists who visited Oman in 2019, totaling 3.51 million. The strategy also aims to increase tourism's share of the country's GDP to reach 6% - 10% in 2040, moving from just 2.6% in 2015. To achieve these goals, Oman has invested in connectivity, destination promotion, and regional marketing (United Nations World Tourism Organization (UNWTO), 2022; Ministry of Heritage and Tourism, 2025a).

As global tourism trends are continuously changing, destinations must focus on delivering unique tourist experiences to remain competitive and ensure sustainable growth (Lee & Back, 2006; Dyer et al., 2007; Vargas-Sanchez et al., 2009; Habibi et al., 2018). On this path, Oman is modernizing its tourism sector through luxury hospitality, niche experiences like adventure tourism, and the development of integrated tourism complexes (ITCs) which are expansive, master-planned developments that combine tourism, residential living, and business opportunities within a single destination (Ministry of Heritage and Tourism, 2025a).

Sustainability is vital to Oman's tourism strategic development, in alignment with the United Nations (UN) Sustainable Development plans. Notably, the Yiti Sustainable City will be Oman's first carbon-neutral tourism development, and all tourism projects are required to follow responsible sustainability principles to ensure viable sector growth (Arab Urban Development Institute, 2023; Oxford Business Group, 2025).

Current Economic Outlook

Despite global economic uncertainty and ongoing regional geopolitical tensions, Oman's macroeconomic outlook remains broadly positive. However, GDP declined by 2% year-on-year in the first quarter of 2026, reaching OMR 10.4 billion. This contraction was mainly linked to performance in both the oil and non-oil sectors. At the same time, some areas of the economy continued to show resilience. The construction sector performed steadily, contributing OMR 1.7 billion and recording a 1.6% increase compared with the previous year. Inflation also rose slightly, reaching 2.8% in June 2026 (Savills, 2026).

The real estate market remained active during the same period. According to the Omani Ministry of Housing and Urban Planning (2026), the total value of property transactions reached OMR 1.43 billion by the end of June 2026, representing a 5.4% increase compared with the same period in 2025. The number of contracts rose by 12.2%, while mortgage activity remained broadly stable, declining only marginally by 0.3%. Foreign Direct Investment in the real estate sector reached OMR 602.5 million by the end of the first quarter of 2026, marking a 1.2% year-on-year increase (Savills, 2026).

This study aims to assess the growth, benefits, and regional footprint of Integrated Tourism Complexes (ITCs) in the Sultanate of Oman. To achieve the aim of the study the following objectives were identified:

- To analyze the socio-economic impacts of ITCs on economic diversification and employment opportunities
- To evaluate the benefits of ITCs for developers and units owners
- To trace the chronological evolution of ITCs in the Sultanate of Oman
- To identify the market position of Omani ITCs within the GCC tourism real estate sector

Methodology

Research Design

This study examines the growth, benefits, and regional presence of Integrated Tourism Complexes (ITCs) in the Sultanate of Oman. Instead of relying on primary research, which can sometimes provide localized and subjective accounts, the study adopts a desk-based mixed-methods approach using secondary data. This design makes it possible to examine the long-term development of Omani ITCs over a twenty-year period, from the introduction of Royal Decree No. 12/2006 through to 2026 (Qanoon, 2006). To provide both depth and measurable insight, the analysis is guided by two complementary perspectives:

- Qualitative framework: The study uses thematic policy analysis to trace how changes in real estate ownership regulations and tourism master plans have influenced the development of ITCs over time
- Quantitative framework: The study uses descriptive analysis of economic indicators to assess market performance and competitiveness

Secondary data analysis involves the systematic re-examination of previously gathered information, a method widely recognized in social science research (Punch, 2005; Johnston, 2014). This approach allowed the research to analyze and understand all ITCs aspects and what shapes and characterizes them regarding:

- Environmental considerations and sustainability mandates
- Foreign investment regulations
- ITCs allocations
- Legal boundaries
- Past lessons and future endeavors
- Policy framework
- Real estate and tourism market dynamics
- Selection and decision making
- Socio-economic perspectives
- Tourism developmental strategies and work plans

Data Sources and Institutional Tiers

The research gathered in depth information and perspectives whether past, current, or futuristic. The data used in this study was drawn entirely from public records, institutional datasets, and real estate publications to ensure that the study objectives were all covered and achieved (See Table 3):

Table 3. *Secondary Data Collection and Utilization Matrix*

Research Objective	Actions (What to do)	Sources
To analyze the socio-economic impacts of ITCs on economic diversification and employment opportunities	By using national statistical indicators on economic diversification and localized employment	• Ministry of Heritage & Tourism • Ministry of Housing and Urban Planning • NCSI Oman • United Nations

To evaluate the benefits of ITCs for developers and units owners	By reviewing past and current market data and related reports	• NCSI Portal • Omani Ministries • Savills / Cavendish Maxwell • United Nations Tourism (World Tourism Organization)
To trace the chronological evolution of ITCs in the Sultanate of Oman	Through a comprehensive policy and legislative literature review	• Decree Oman • Ministry of Heritage & Tourism • Ministry of Housing and Urban Planning • Oman Legal Portal (Qanoon) • Oman News Agency (ONA)
To identify the market position of Omani ITCs within the GCC tourism real estate sector	By comparing the competitive market position and growth trajectory	• NCSI Portal • Savills / Cavendish Maxwell • World Bank

Data Synthesis and Analysis

The collected data were synthesized through a two-part analytical process:

- Thematic document analysis: Policy documents, strategic plans such as Oman Vision 2040, and relevant legislative decrees were reviewed chronologically to show how national policy has moved from basic real estate zoning toward the development of self-sustaining, tourism-oriented luxury residential destinations
- Comparative financial evaluation: Key financial indicators were organized by year to calculate overall patterns in rental returns and asset growth. These results were then compared with regional benchmarks from neighboring GCC markets to assess Oman's relative attractiveness for investors

Following Creswell's (2009) recommendation, the evidence gathered in this study was not treated as a set of separate descriptions. Instead, the data were examined in relation to one another to show how regulation, market forces, tourism planning, community benefits, and sustainability considerations interact within the context of ITCs. This approach allowed the study to move beyond simple description and to understand ITCs as multidimensional development tools, rather than only as real estate projects or hotel complexes.

Understanding Integrated Tourism Complexes (ITCs)

To understand Integrated Tourism Complexes (ITCs), it should be considered that tourism is affected by physical (Tangible) and cultural factors (Intangible). While travelers see tangibles like landscape, buildings, and other features of a destination, they also see intangibles like traditions, community values, and culture. Thus, the tangible and intangible components form the perception and the understanding of a destination (Qu et al., 2011).

For ITCs to succeed it should be considered that these projects are not just buildings and infrastructures but also a representation of local culture and heritage. The perception of cultural identity and authenticity as an integral part of the tourist experience makes the destination more attractive for tourists.

Considering both the infrastructure and the cultural context allows making a more accurate evaluation of the potential impact of ITCs on sustainable tourism and benefits for the nearby community and residents, as well as for the tourists. The core components of ITCs include the following:

- Lodging Options: Hotels, resorts, apartments, and villas are available in most of ITCs and accommodate various types of guests (tourists, residents, second home owners)
- Leisure and Recreation: ITCs might have marinas, golf clubs, wellness centers, entertainment zones, and other facilities supporting both tourism and residence purposes
- Cultural Integration: Some ITCs have zones where Omani heritage is demonstrated via crafts, arts, events, and programs.
- Shopping and Food Services: Shopping centers and cafes increase the mix of services offered by ITCs

In view of the capacity of ITCs to draw foreign investments and enhance the image of Oman as a tourist destination, the Omani authorities have included ITCs among the important tools for investing in tourism. The benefits are not limited to attracting investments but also allowing locals to participate through employment and small and medium enterprises (SMEs) work opportunities (Oman News agency, 2023).

The Integrated Tourism Complexes (ITCs) are a distinct concept of tourism and real estate in Oman. ITCs are the only areas where foreigners can have full property ownership. ITCs are constructed in areas like Muscat, South Batinah, Dhofar, and South Sharqiyah, with other Wilayats (regions) planned for development in the near future (Afifi et al., 2016; Decree, 2021; Ministry of Heritage and Tourism, 2024). Some Important Characteristics of the ITC Ownership Concept are:

- Full Ownership Rights: Non-Omani investors are allowed to purchase freehold property in ITCs designated areas
- Residency Rights: Possession of a property in ITCs qualify owners and their families to have residence permits in Oman

This approach provides a secure vacation residence investment and an opportunity for foreigners to become part of the Omani community (Oxford Business Group, 2016; Ministry of Heritage and Tourism, 2025a). The targeted segments include:

- Affluent Individuals (Wealthy People): Buyers looking to invest in a stable and quality second home in a politically stable country
- Retired People: People searching for a tranquil, warm, and good service-providing environment to spend their retirement or seasonal time in
- Distant Workers: Distant workers who prefer to have quality infrastructure and facilities as well as flexibility of residence
- Regional Expatriates: Gulf residents who want to build a base for themselves in Oman

Public Policy and Community Engagement in Tourism Development

Tourism development initiatives often encounter complex challenges arising from differences in cultural, economic, environmental, and social structures between local populations and visitors. The unpredictability of outcomes and the limitations of conventional approaches in addressing ethical dilemmas highlight the necessity for broad-based, inclusive participation especially from community members who are not technical experts in tourism planning (Grybovych et al., 2011).

Public policy is an essential tool that determines the path and consequences of tourism development. For tourism initiatives to be successful, policy measures need to consider local social, economic, cultural, and natural environment. In other words, successful policies not only need to enhance the positive economic aspects of tourism but also defend community and environmental interests (Douglas, 2014; Gordon & Goodall, 2000; Hultman & Hall, 2012; Lew, 2017).

Involvement of local community members is highly important, especially in projects which affect their lives in one way or another (Di Maddaloni & Davis, 2018). In most developed nations, participation by the public has been integrated into the project cycle with the aim of accommodating stakeholders' interests at various stages ranging from planning through implementation (Li et al., 2012). On the other hand, engagement of local communities has been inadequate, inconsistent or even lacking in many developing nations (Sun et al., 2016).

Involvement of stakeholders in the development process is thus critical when formulating tourism policies. According to López and Arreola (2019), involvement of local residents in decision making processes would not only make tourism policies more place-oriented but also enhance sense of ownership among the residents. Meaningful participation will not only lead to establishment of trust but will also encourage collaboration which will be essential for sustainability of such tourism projects.

There exists a useful model by Ap and Crompton (1993) for understanding the possible reaction of local communities towards tourism change. This model includes four potential reactions:

- Embrace: The residents embrace tourism because of the social or economic gains associated with it

- Tolerance: The residents tolerate certain negative consequences because of the economic gains expected from tourism
- Adjustment: The residents modify their behaviors or routines to minimize contact with tourism pressures
- Withdrawal: The residents withdraw temporarily from affected areas to avoid tourism pressures

Another influential model is Butler's Tourism Area Life Cycle (TALC) (Butler, 1980; Butler, 2014), which describes the evolution of resort destinations through several phases:

- Exploration Stage: There are few visitors to the destination; tourism facilities are not available
- Participation Stage: Local involvement increases, and the development of basic facilities starts
- Development Stage: There is rapid development in terms of facilities, greater marketing effort, and increased number of tourists
- Consolidation Stage: Tourism has become one of the dominant economic activities; the speed of its development slows down
- Stagnation Stage: The number of tourists reaches its maximum level, and problems, like pressure on environment, crowding, or culture arise
- Decline or Rejuvenation Stage: Either the decline occurs because of these problems or the destination is rejuvenated

The evaluation of the results of tourism and hospitality initiatives should not only occur at the project completion stage. The implications of such initiatives become apparent when destinations come close to the stagnation stage, where performance, sustainability, and renewal issues arise (Lundtorp & Wanhill, 2001; Jugdev & Müller, 2005; Andriotis, 2008; Butler, 2014). At that stage the stakeholders have enough information to evaluate if a particular development has met its targets or intervention is needed (Voase, 1995).

Community participation is an efficient way to make tourism planning processes better as well as enhance the results of tourism initiatives. Regarding the ITCs, involving the local community during planning and development stages and providing them with the opportunity to provide feedback after the project has been implemented will help build positive relationships among the host community, tourists, developers, and government officials.

Tourism strategies that are based on the principles of participation and comprehensiveness are the ones that are going to result in the fair distribution of benefits. When the needs of the community are considered by the policymakers, it will be possible to facilitate the development of tourism sector that would be productive and socially balanced.

Second Home Tourism: Socio-Economic Impacts and Community Integration in Destination Tourism Development

In the context of global tourism, properties acquired by individuals outside their country of primary residence are commonly referred to as "Second Homes". These dwellings are primarily intended for leisure, vacation, or temporary stays, distinguishing them from the owner's main place of residence (Jaakson, 1986; Roca, 2013). At the same time, in many cases, owners allow renting out these properties, which implies that the process of second home buying is also characterized by investment factors (Cengizci et al., 2020; Zoğal et al., 2020). The following features distinguish the second homes from the first ones (Coppock, 1977; Kaltenborn & Clout, 1998; Huang & Yi, 2011; Nepal & Jamal, 2011; Overvåg & Berg, 2011; Öztürk & Türk, 2021):

- Usage Frequency: Second homes are not used all year-round but are occupied on a periodic basis, especially during holidays, weekends, or seasonal periods
- Function: Contrary to the first homes that are intended for the maintenance of the daily household activities, the second homes are associated with leisure and vacations
- Geographical Location: Second homes are situated in locations that are attractive due to the presence of the picturesque nature, seaside, tourism potential, or urban facilities

Several factors contribute to a destination's attractiveness for second home tourism: political stability, safety, scenic landscapes, rich natural and cultural assets, high-quality amenities, and diverse recreational opportunities. Achieving genuine integration of second home tourism requires coordinated efforts at both the municipal and national levels (Overvåg & Gunnerud Berg, 2011; Wong et al., 2017).

In economic terms, second home owners may contribute to stimulating local economies via their expenditures on property maintenance, consumption, tourism services, construction, and other services (Visser, 2008; Hoogendoorn & Visser, 2015; Larsson & Muller, 2017). The contribution of second home owners is also expected to positively affect the seasonality of tourism activities by extending the tourism season, setting high-level expectations from local businesses, and offering more stable tourism than short-term tourism (Hjalager, 2002; Cooper, 2006; Hallin & Marnburg, 2008; Nordbø, 2014; Robertsson & Marjavaara, 2015).

Second home owners typically have higher disposable income than permanent inhabitants (Larsson & Muller, 2017). In this way, the contribution of such tourism segment is expected to benefit the local economy by allowing local businesses to develop and offer various products/services adjusted to the needs of a richer clientele and contributing to employment (Afifi et al., 2016). Nevertheless, it is necessary to mention that the sustainability of this segment may be questionable, as its development will depend on the availability of real estate properties and general economic, social, and environmental situation (Anabestani, 2014).

The emergence of second home tourism in Oman has introduced new dynamics to the country's tourism sector. This trend brings both opportunities and challenges, as increased interaction between foreign property owners and local residents leads to a variety of socio-economic effects (Hall & Müller, 2004; Brida et al., 2011; Nouza et al., 2018; Baltaci & Cevirgen, 2020; Tuulentie & Kietäväinen, 2020).

The arrival of second home owners from abroad introduces complex social dynamics within host communities. Some locals might accept new cultures and community sharing while others may show rigidity and concerns about how these new commers might affect community long established traditions and norms. To limit friction and assure a smooth transitional phase, common ground must be created, a series of community-based activities that relate to both parties and interest them should be organized, this would create a feeling of belonging and relief (Afifi et al., 2016).

Legal Foundations for Integrated Tourism Complexes (ITCs) in Oman

Oman's approach to property free hold ownership within Integrated Tourism Complexes (ITCs) is guided by a legal framework mandated to attract local, regional, and international investments. The Royal Decree No. 12/2006 paved the way for Omanis and foreigners whether individuals or companies to own properties within designated ITCs zones, for either residential or investment purposes (Qanoon, 2006).

Furthermore, Ministerial Decree No. 191/2007 (Article 24) grants residency rights to non-Omanis who own units/properties within the designated ITCs, extending these privileges to their immediate family members for as long as they own the units/properties.

Oman's Tourism Strategy 2040, initiative 23 details the need for continuous revision and modernization of the legal framework governing tourism and ITCs. Key actions include (THR Innovative Tourism Consultants, 2015):

- Modernizing the Oman Tourism Law to reflect current industry needs
- Revising ITCs and foreign investment regulations to encourage growth and streamline processes
- Launching a public digital repository for all tourism-related laws and regulations, making them easily accessible and transparent

This comprehensive legal modernization aims to simplify regulations, eliminate outdated rules, and introduce new measures that foster a more dynamic, investor-friendly tourism sector. A dedicated online platform ensures that all stakeholders including investors, developers, and the local population have an updated knowledge and information of the legal mandates governing tourism and ITCs in Oman.

Oman's Integrated Tourism Complex (ITC) Land Allocation Framework

To start an ITC project in Oman, interested developers must first present a detailed project plan to the Ministry of Heritage and Tourism. Chosen construction areas must be located at least 20 kilometers from the country's borders and cover an area that is more than 200,000 square meters. The project will then be reviewed and verified by the government committee concerned (See Table 4). If the project is initially approved, the Ministry of Housing will check whether the suggested location is the property of the government or not (Decree, 2021; Qanoon, 2021).

Table 4. *Government Committee for Licensing Integrated Tourism Complexes*

1	The Undersecretary of the Ministry of Heritage and Tourism	Chairman
2	The Undersecretary of the Ministry of Housing and Urban Planning	Member
3	The Undersecretary of the Ministry of Commerce, Industry, and Investment Promotion	Member
4	The Director General of Criminal Inquiries and Investigations in Royal Oman Police	Member
5	The Director General of Planning in the Ministry of Heritage and Tourism	Member
6	The Assistant Director General of Environmental Affairs in the Environment Authority	Member

Adapted from: Decree (2021); Qanoon (2021)

In case the land is privately held or occupied by citizens, a specialized government appointed committee manages a compensation process, offering a monetary compensation ranging between 50 and 90 Omani Riyals per square meter, in accordance with Omani laws. These compensation costs are covered by the government, not the investor. However, developers are required to remedy any unfavorable effects their project may have on locals, such as fishing activities.

Once approved, developers receive usage and development rights for a time span of 50 years. After which, the land returns to government ownership unless an extended usage and development agreement is reached. During the usage and development period, developers pay a stipulated annual lease fee ranging from 50 to 600 Baisa (One Omani Riyal is 1000 Baisas) per square meter, for only half the project's total area with a five-year rent exemption for new projects. Mega projects are granted the lowest rental rates.

The developers also pay a fee of 25 Omani Riyals per square meter per unit sold, to increase annually by 6% until the unit official registration at the Ministry of Housing. It is the government's responsibility to provide infrastructure up to the complex's entrance, while any in project networks is the responsibility of the developers based on stipulated official standards. ITCs utility rates are in accordance with those in other residential zones.

Integrated Tourism Complexes (ITCs) in Oman: Progress and Persistent Challenges

During the period from 2005 to 2015, 25 Integrated Tourism Complexes (ITCs) have been licensed by the Omani government through its Ministry of Tourism, as part of the larger strategy of the country for diversification of its economy (See Table 5). While the development of these complexes is hoped to increase tourism capacity and contribute to the transformation process, it turned out that their implementation was problematic, with some of them delayed, suspended or even cancelled. The following are major challenges of the implementation of the 25 ITCs:

- High Rate of Disrupted Projects: Eight of the total number of 25 ITCs licensed by the Ministry have been either suspended or canceled, which indicates the continuity of problems and challenges in implementation of such projects
- Limited Operational Success: Five of the 25 ITCs have started partial operations
- Prolonged Construction Timelines: One of the complexes is currently under construction
- Slow Early-Stage Progress: Eleven projects are still under the preparation stage

Table 5. *Status of the Licensed Integrated Tourism Complexes (ITCs) (2005 - 2015)*

s/n	Project	Governorate	Note
Muscat Governorate			
1	Yiti (Salam Yiti Resort)	Muscat	Suspended
2	Jabal Al Sefa Resort	Muscat	In partial operation
3	Bar Al Jessa Resort	Muscat	In partial operation
4	Saraya Bandar Al-Jassa	Muscat	In the construction phase
5	Yenket Resort	Muscat	Cancelled
6	Ant Resort	Muttrah	Cancelled
7	Quraiyat Aviation Resort	Quraiyat	In preparation
8	Al Mouj	Bushar	In partial operation
9	Muscat Golf Course	Bushar	In partial operation
10	Naseem Al-Sabah Resort	Al-Seeb	In preparation
11	Omagen Project	Al-Seeb	In preparation
Batinah South Governorate			
12	Blue City	Barka	Suspended
13	Malkay Resort	Barka	In preparation
14	Palm Beach Resort	Barka	In preparation
15	Water Tune Resort	Musanaa	In preparation
16	Al Aqr Spa	Shinase	Cancelled
17	Peace Resort	Shinase	Suspended
Sharkeya South Governorate			
18	Fantasy Resort	Sur	In preparation
19	Ras Al-Hadd Project	Sur	In preparation
Wusta Governorate			
20	Ruwais Resort	Mehout	Cancelled

Dhofar Governorate			
21	Genoa Resort	Al-Shoimia	In preparation
22	Plattuz Resort	Hellaniat Islands	Cancelled
23	Aftelquot Resort	Salalah	In preparation
24	Marbat Tourist Resort	Marbat	In preparation
25	Hawana Salalah	Taqah	In partial operation

Adapted from: Afifi et al. (2016)

This trend illustrates that developing big tourism ventures is more difficult than the process of licensing alone would indicate. The postponement or cancellation of projects seems to be associated with the interplay between various factors, such as regulation, financial limitations, changes in demand, and problems of reconciling the objectives of different parties. For ITCs to work more efficiently as instruments of economic development, these structural problems should be solved.

Following this, Oman has continued to make further advancements in the development and distribution of ITCs in its territories. The most recent information on this is provided below (See Table 6). This table reflects the current state of ITCs distribution throughout different governorates of the Sultanate, as of March 2025 (Ministry of Heritage and Tourism, 2025b).

Table 6. *The distribution of ITCs in Oman*

s/n	**Project Name**	**Project Components**				**Land Area (M^2)**	**Investment Amount in RO**
		Hotels	**Number of Rooms**	**Hotel Apartments**	**Residential Units**		
Muscat Governorate							
1	Al Mouj	7	1554	100	6000	2,218,087	1,184,095,000
2	Bar Al Jessa Resort	3	700	0	148	434,525	300,000,000
3	Muscat Hills	1	600	0	1929	1,200,000	70,000,000
4	Jabal al Sefa Resort	4	1047	159	1000	6,247,752	337,900,000
5	Muscat Bay	2	280	0	426	2,195,626	249,290,224
6	Yiti (ITC Project)	15	2832	0	8665	11,216,000	-
-	The Sustainable City Project	2	-	-	-	993,873	297,843,056
-	Aida Project	2	450	-	3933	3,500,000	925,000,000
7	Mandarine oriental residence	1	150	0	156	32,572	100,000,000
8	Four Seasons	1	200	0	91	138,583	104,000,000
9	Madenat Al Erfan	3	881	151	788	1,553,007	250,000,000
10	Qurraiyat Project	3	750	0	4000	1,282,300	385,000,000

	(Hay Al Sahel)						
Batinah South Governorate							
11	Grand Blue City	3	568	0	3200	30,000,000	5,650,813,908
-	Al Sharq	2	-	-	-	590,000	108,147,209
Sharkeya South Governorate							
12	Diar Ras Al Hadd Resort	3	700	0	488	1,971,823	200,000,000
Dhofar Governorate							
13	Hawana Salalah	8	2000	186	2980	13,568,300	516,700,000
Total		54	12262	596	30871	72,090,275	10,678,789,397

Adapted from: Ministry of Heritage and Tourism (2025b)

A Comparative Analysis of ITC Property Markets and Rental Returns in the GCC

Integrated Tourism Complexes (ITCs) in Oman offer a variety of residential options ranging from apartments to villas each with its own set of amenities and price ranges. What signifies Oman within the Gulf real estate landscape is the relative price affordability of these properties compared to the alike in Dubai, Abu Dhabi, and Doha (See Table 7) (Savills, 2026).

Table 7. *Price Range of ITC Units in Oman*

Type of Unit	Muscat	Dubai	Abu Dhabi	Doha
Apartments	800 - 1,100 OMR/M^2	1,600 - 2,100 OMR/M^2	1,400 - 1,850 OMR/M^2	1,000 - 1,300 OMR/M^2
Villa/Townhouse	750 - 1,000 OMR/M^2	1,400 - 1,850 OMR/M^2	1,350 - 1,750 OMR/M^2	750 - 1,050 OMR/M^2

Adapted from: Roche (2025)

Considering investment returns, apartments within Oman's ITCs typically yield gross rental returns between 5% and 8%. This performance is similar to the rental yields found in Dubai, Abu Dhabi, and Doha, indicating that Oman is an attractive option in terms of income potential for investors. For villas and townhouses, Oman's pricing is generally more affordable than in Dubai and Abu Dhabi, while Doha's market tends to be restricted in range. Rental yields for these property types in Oman are usually between 4% and 6%, again similar to the returns in Dubai and Abu Dhabi, and slightly exceeding Doha, where yields are often between 3% and 6% (Roche, 2025).

In fact, Oman's ITCs sector is significant for its blend of compelling rental yields and lower entry costs. This mixture for investors might provide easier access to the real estate sector in the Gulf region while still getting returns that will compare favorably to those available in the bigger cities in the region. The reason for this is that Oman's place is not just determined by its cost factor but by this balance too (Savills, 2026).

An Analysis of the potential impacts of ITCs on Oman's landscape

Economic Impacts of ITCs

ITC's effects on the economy could come through various interrelated mechanisms. The economy impacts could be reflected in jobs creation, revenue generation from the associated activities of tourism industry, and involvement of local businesses in broader visitor and property markets (Andereck et al., 2005; Oviedo et al., 2008).

Tourism under the ITCs in Oman would contribute to GDP growth not just by expenditures in them but also by creating jobs for people living around and enterprises engaged in business there. Since ITCs utilize different types of services such as hospitality, retail trade, transportation, and crafts manufacturing, then its impact could be felt even outside of the confines of the ITC complex.

Workforce Development and Employment Expansion through ITCs

There is potential for job creation in many different areas of employment through the introduction of ITCs in Oman, which will assist in achieving the government's goal of diversifying its economy. Employment is created in the hotel industry, as well as in restaurants and other forms of recreation. There are also possibilities for jobs creation in related fields such as agriculture, handicrafts, transportation, and logistics (Yoon et al., 2001).

Thus, the development of the workforce can become one of the necessary conditions for increasing the economic benefits of ITCs. Training programs associated with these projects will enable local workers to gain skills needed for their work in tourism, hospitality, and other services.

Supporting Local Artisans and Businesses

ITCs may also help local economies to thrive through creating demand for goods and services offered by local artisans and small enterprises. Collaborations between local artists will help not only diversify tourism products, but also to create additional sources of revenue for local communities. It is critical because such connections allow connecting tourism development and heritage protection with entrepreneurship initiatives. Traditional goods will have an opportunity to enter niche markets if they are sold within well-designed tourism frameworks (Ratten & Ferreira, 2017; Abreu et al., 2018).

Challenges and Risks

Although there are many such advantages associated with ICTs, they do have some economic drawbacks. Over-reliance on tourism can make the local population susceptible to changes due to seasonality, global slowdowns, and any other kind of outside pressure (Ince et al., 2020). In addition, it is possible that the benefits will go only to the developers and companies, while local people and small businesses get very little out of it.

Real-estate ventures vs tourism components

Although ITCs can sometimes be perceived as real-estate ventures packaged as tourism projects, the "tourism" designation in Oman is tied to enforceable regulatory conditions. In order to maintain ITCs aligned with the Omani tourism vision/agenda, developers must adhere to some defined rules and regulations that include the following:

- Mandatory tourism and hospitality provisions: Under the supervision of the Ministry of Heritage and Tourism the developers must ensure that prescribed tourism components are established as part of the project. As stipulated by Ministerial Decree No. 98/2009 the residential units must not outnumber hotel units, in order to protect the tourism and hospitality components and prevent purely residential outcomes
- Public amenities: ITCs are required to deliver genuinely "integrated" destinations, which means providing leisure and commercial facilities intended to attract and serve non-residents as well as residents (for example, marinas, golf facilities, and commercial centers)
- Land-use allocations and the sequencing of project phases: Developers must submit a detailed Development Control Plan (DCP) specifying land-use allocations and the sequencing of project phases. Any deviation of the approved schedule might lead to penalties and in some cases the cancellation of the project license or land withdrawal
- socio-economic contributions: ITCs are not just residential zones; they are structured to add to the accommodation inventory and tourism and hospitality services within the Omani market. As a matter of fact, ITCs are required to contribute to Oman's GDP, tourism and hospitality operations, and to create employment opportunities

Socio-Cultural Impacts of ITCs

<u>Socio-Cultural Impacts of Integrated Tourism Complexes (ITCs)</u>

ITC can transform the social and cultural environment of the host community. The relationship between tourists, locals, and second home owners transforms the usage patterns, transforms the experiences of public and semi-public spaces, and might affect the expression of local identities in tourism contexts (Ernawati et al., 2018; Kim & Park, 2021). According to McKercher et al. (2015), there are three categories of spaces related to tourism:

- Tourism Places: Places that attract tourists and where tourism products and services are offered
- Shared Places: Areas utilized by both the local community members and tourists

- Non-Tourism Places: Local spaces where tourists are not welcome, and entry into those spaces is restricted to maintain the privacy of the local community members

Community Engagement and Cultural Preservation

For the ITCs to have positive contributions in the communities where they operate, the people in those communities should be allowed to participate in the planning process, and where applicable, even in their operations. Inclusion of their views ensures that tourism projects are representative of the culture of the community members and avoid the depiction of the cultural practices in a way that makes them seem like they have been removed from their context (Yoon et al., 2001; Besculides et al., 2002).

Risks of Cultural Commodification

However, tourism may create problems for the preservation of cultural authenticity. Whenever the traditions, arts, performances or practices of any group are altered to cater to the interests of tourists, their true social value may become less prominent (Ince et al., 2020). It is not necessary to eliminate culture from tourism; rather, what it requires is proper management that ensures its dignified representation.

Social Tensions and Community Resistance

In this regard, social tension may arise if the economic benefits from tourism are distributed unequally or people perceive rapid growth of tourism as an alteration of their community values. In this case, any opposition would not be directed at tourism per se but would represent worries about being marginalized or excluded from decision-making processes or threats to culture. Therefore, constant interaction with the local community is required for ITCs to develop sustainably.

Environmental Impacts of ITCs

Environmental Aspects of Integrated Tourism Complexes (ITCs)

It is crucial to evaluate the environmental aspects of ITCs since they imply a significant expansion of territory and creation of the infrastructure as well as increased number of tourists that stay in this area during that period of time. Their influence will cover the nearby habitats, coasts, water supply and waste management system. For this reason, environmental assessment plays a crucial role in the evaluation of possibility to develop tourism sustainably.

Potential Environmental Benefits

Sustainability principles incorporated into project management and development may have positive effects on natural and cultural heritage preservation through strategic tourism planning. It helps in preserving heritage sites, increasing biodiversity and promoting more rational use of landscapes (Kuscer & Mihalic, 2019). Components of eco-tourism and cultural tourism can help in raising awareness among visitors and local population as well as providing funding for restoration and conservation projects.

Potential Environmental Pressure

At the same time, tourism development may impose pressure on the environment if it is not controlled properly. Construction of hotels, entertainment venues, residential premises, infrastructure and its maintenance may result in disturbance of ecosystem and habitat of wildlife. Increased influx of people and number of visitors creates additional burden on waste management and pollution control systems, especially in environmentally sensitive coastal and natural territories (Keles, 2012; Stylidis & Terzidou, 2014; Dioko, 2017; Kuscer & Mihalic, 2019).

Regulation and Sustainable Management

Therefore, it is necessary to provide clear environmental regulations and to follow them consistently throughout both stages of construction and functioning of ITCs. Environmental impact assessment, implementation of resource efficient designs, reduction of waste generation, water saving measures and continuous monitoring are particularly crucial in this situation.

Conclusions

Integrated Tourism Complexes (ITCs) have become an integral part of Oman's strategy for development and tourism. ITCs have the potential to assist in economic diversification, tourism employment generation, and attraction of investments in emerging destinations; at the same time, these potentials cannot be realized automatically. Successful ITCs depend on the efficiency of their planning, regulation, integration with local communities, and management in terms of social, cultural, economic, and environmental impacts.

Assessment of ITCs Benefits and Constraints

Benefits

- Cultural Values: ITCs can be helpful in promoting Omani heritage, crafts, architecture and traditions if cultural elements are respected and linked to local communities
- Economic Diversification: ITCs can diversify an economy by attracting investments, developing infrastructure and generating demand in the fields of hospitality, retail, transport, and real estate
- Employment Generation: Due to a variety of activities carried out at ITCs, they have potential to provide job opportunities in different sectors. Employment generation at ITCs is especially relevant in relation to Omanization targets
- Foreign Investments: ITCs possess the potential to attract foreign investments and enhance the image of Oman as a tourist destination.

They also provide a secure vacation residence investment and an opportunity for foreigners to become part of the Omani community. Despite global economic uncertainty and ongoing regional geopolitical tensions, Oman's macroeconomic outlook remains broadly positive

- Legal Modernization: ITCs have acted as a catalyst for updating Oman's tourism-related legal framework so that it better reflects current industry needs. This includes revising regulations governing ITCs and foreign investment to encourage growth, reduce procedural complexity, and improve the overall investment environment. Such legal modernization aims to simplify regulations, remove outdated provisions, and introduce more responsive measures that support a dynamic, transparent, and investor-friendly tourism sector
- Potential for Sustainability: Incorporating sustainability requirements in the planning process can encourage better environmental management, efficient resource use and types of tourism that are aligned with Oman's long-term development goals

Constraints

- Cultural Commodification: Practices of Omani culture may be commodified by being transformed for tourists' needs instead of using community-based approach and preserving traditions and culture
- Environmental Risks: Due to large-scale construction works and tourists' activities, land, water, coastlines and natural habitats can be endangered without appropriate environmental assessments and monitoring
- Exposure to Tourism Vulnerability: Communities and companies involved in ITCs will face seasonal fluctuation in tourist numbers, global crises, changes in tourist or property markets
- Governance: Based on the study, the following measures seem crucial: development of governance mechanisms that will include communities, developers, investors, government authorities in the process of project's realization. Communities should not be seen only as recipients of tourism impacts but rather as partners that can contribute to the project's quality through their participation in its planning and monitoring.
- Large Investment Needs: High costs associated with ITCs can limit small investors' participation in the projects and make them prone to financial and market risks
- Risk Assessment: While working to achieve Vision 2040, Oman relies on ITCs as a tool to promote tourism economic contributions. Al Mouj and Hawana Salalah are fine examples of ITCs combining accommodation, entertainment, property and community-related features. At the same time, the examples of postponed, suspended or cancelled projects show the importance of close monitoring and risk assessment to ensure ITCs success

Contribution to Knowledge

The research contributes to the existing knowledge on tourism and real estate development in Oman in general and ITCs in particular, many studies dealt with the former, but the latter has not been widely discussed in academia. Methodologically, the study depended on various sources: academic literature, official statistics, and government documents and legislation. The secondary data analysis methodology allowed the study to evaluate ITCs comprehensively in the past, present, heading to the future. ITCs impacts on various aspects of society and environment are assessed, the benefits (creation of jobs, local economic development, cultural development and destination attractiveness) and risks (inequitable sharing of benefits, negative influence on environment, culture, and economy dependent on tourism industry) are highlighted.

Limitations of the Study

The study is limited to its reliance on existing data, which may be subject to bias, inconsistencies, or lack of up-to-date information. The study recognizes that secondary data analysis has limitations, including possible inconsistencies among sources, and variation in the availability of updated data. These limitations were addressed by cross-checking information across multiple sources and by using the evidence cautiously and contextually.

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