

Central Asia Region

**Central Asia Region  
Data Collection Survey on  
Tourism Industry Promotion  
in the Central Asia Region**

**Final Report**

January 2022

Japan International Cooperation Agency (JICA)

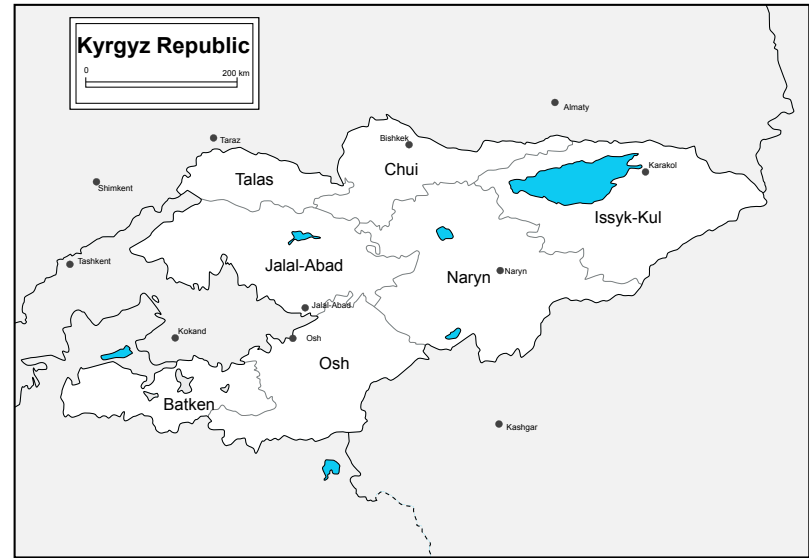
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Study Area: Five countries in Central Asia



Regions of Uzbekistan, Kyrgyz Republic and Kazakhstan

# Data Collection Survey on Tourism Industry Promotion in the Central Asia Region

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## List of abbreviations

ABEC	Almaty-Bishkek Economic Corridor
ADB	Asian Development Bank
AmCham	American Chamber of Commerce
APTA	Association of Private Tourism Agencies of Uzbekistan
AR	Augmented Reality
ATM	Arabian Travel Market
ATTA	Adventure Travel and Trade Association
BGI	Business Growth Initiative
CAREC	Central Asia Region Economic Cooperation
CATA	Central America Tourism Agency
CBT	Community-based tourism
CEO	Chief Executive Officer
CIM	Center for International Migration and Development
CIR	Coordinator for International Relations
CIS	Commonwealth of Independent States
COE	Center of Excellence
COIL	Collaborative Online International Learning
CTJ	Competitiveness, Trade and Jobs
CTO	Caribbean Tourism Organization
DMO	Destination management organization
DOT	Department of Tourism, Ministry of Economy and Finance
EBRD	European Bank for Reconstruction and Development
ECEAT	European Centre for Ecological and Agricultural Tourism
EU	European Union
FAM	Familiarization
FANR	Food, Agriculture and Natural Resources
FEZ	Free Economic Zone
FGI	Future Growth Initiative
FITUR	Feria Internacional de Turismo
GDP	Gross Domestic Products
Ge-NIS	Global Education Program for Developing Multilingual Human Resources in Japan, NIS and Baltic Countries
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit GmbH
HoReCa	Hotel, restaurant and café
IBRD	International Bank for Reconstruction and Development
ICT	Information and Communication Technology
IDB	Inter-American Development Bank
IMF	International Monetary Fund
IMFGA	International Federation of Mountain Guides Associations
IPA	Instrument for Pre-Accession Assistance
IsDB	Islamic Development Bank
ITB Berlin	Internationale Tourismus-Börse Berlin
JATA	Japan Association of Travel Agents
JETRO	Japan External Trade Organization
JICA	Japan International Cooperation Agency
JPY	Japanese yen
KATO	Kyrgyz Association of Tour Operators
KGS	Kyrgyzstan som
KITF	Kazakhstan International Tourism Fair
KMGA	Kyrgyz Mountain Guide Association
KMRS	Kyrgyz Mountain Rescue Services
KOICA	Korea International Cooperation Agency

KRJC	Kyrgyz Republic-Japan Center for Human Development
KTA	Kazakhstan Tourist Association
KZT	Kazakhstani tenge
LCBTA	Kyrgyz Community Based Tourism Association
LLC	Limited Liability Company
MDIS	Management Development Institute of Singapore
MICE	Meeting, incentive, conference and event
MIFT	Ministry of Investments and Foreign Trade
MITT	Moscow International Travel & Tourism Exhibition
MOTAS	Ministry of Tourism and Sports
MOU	Minutes of Understanding
NGO	Non-governmental organization
NipCA Project	Nippon Foundation Central Asia-Japan Human Resource Development Project
OVOP Project	One Village One Products Project
PDCA	Plan, do, check, and action
PMS	Property Management System
RCC	Regional Cooperation Council
RETOSA	Regional Tourism Organization for Southern Africa
SADC	South African Development Community
SCO	Shanghai Cooperation Organization
SCP	Sustainable consumption and production
SDC	Swiss Agency for Development and Cooperation
SDGs	Sustainable Development Goals
SEE	South East Europe
SEZ	Special Economic Zone
SICA	Sistema de la Integración Centroamericana
SITF	Seoul International Tourism Fair
SPTO	Pacific Tourism Organization
TCU	Technical Coordinating Unit
TIKA	Turkish Cooperation and Coordination Agency
TJS	Tajikistani somoni
ToT	Training of Trainers
TTCI	Travel & Tourism Competitiveness Index
Turkic Council	Cooperation Council of Turkic-Speaking Countries
UAE	United Arab Emirates
UNDP	United Nations Development Programme
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNWTO	United Nations World Tourism Organization
USAID	United States Agency for International Development
USD	US dollar
UZS	Uzbekistani sum
VR	Virtual Reality
WEF	World Economic Forum
WTK	Winter Tourism Kyrgyzstan
WTM	World Travel Market
WTTC	World Travel & Tourism Council



## Introduction

### Background of the survey

The five Central Asian countries (Uzbekistan, Kazakhstan, Kyrgyz Republic, Tajikistan, and Turkmenistan) have experienced economic growth of between 4% and 6% from 2010 to 2019. GDP per capita in 2019 is 9,723 US dollars and 7,830 US dollars for Kazakhstan and Turkmenistan, where oil and natural gas are exported, 1,725 US dollars and 1,323 US dollars for Uzbekistan and the Kyrgyz Republic, and 881 US dollars for Tajikistan<sup>1</sup>.

In addition to historical and natural heritage related to the Silk Road, the countries have cultural resources such as folk art, traditional performing arts, and food culture, which can develop tourism attractions, but those have not been fully utilized so far. Japan has been supporting these countries with the five countries through the "Central Asia plus Japan" Dialogue since 2004. The Dialogue is a framework for discussion and cooperation to address common issues in the region. At the 7<sup>th</sup> Foreign Ministers' Meeting organized in 2019, they agreed to work on cooperation in tourism as a new area of cooperation. And at the 5<sup>th</sup> expert meeting of the Dialogue held in January 2020, the experts from each country confirmed the importance of cooperation to take advantage of their tourism potential. Preliminary ideas of the new cooperation in tourism include "Silk Road Visa" that can be used in the Central Asian countries and the establishment of tourist routes that follow historical sites related to the Silk Road.

Although Central Asian countries have been active in developing the tourism industry, the percentages of the tourism industry to the GDP in the Central Asian countries are about 5% on average. The competitiveness of tourism is low compared to other countries. In the Central Asian countries, the challenges in promoting the tourism sector are effective utilization of tourism resources, planning and implementation of marketing strategies, infrastructure development related to tourism, and securing employment opportunities through human resource development for the younger generation.

Based on the above background, this survey will collect detailed information on the current status of the tourism sector in five countries in Central Asia and summarize the current situation and issues related to the sustainable development of tourism and related industries.

### Purpose of the survey and survey area

This survey aims to collect and analyze the current situation and issues of the tourism and related industries in the five Central Asian countries in conjunction with the dispatch of the JICA expert "Tourism Promotion Advisor" to Uzbekistan, and to produce the following three outputs.

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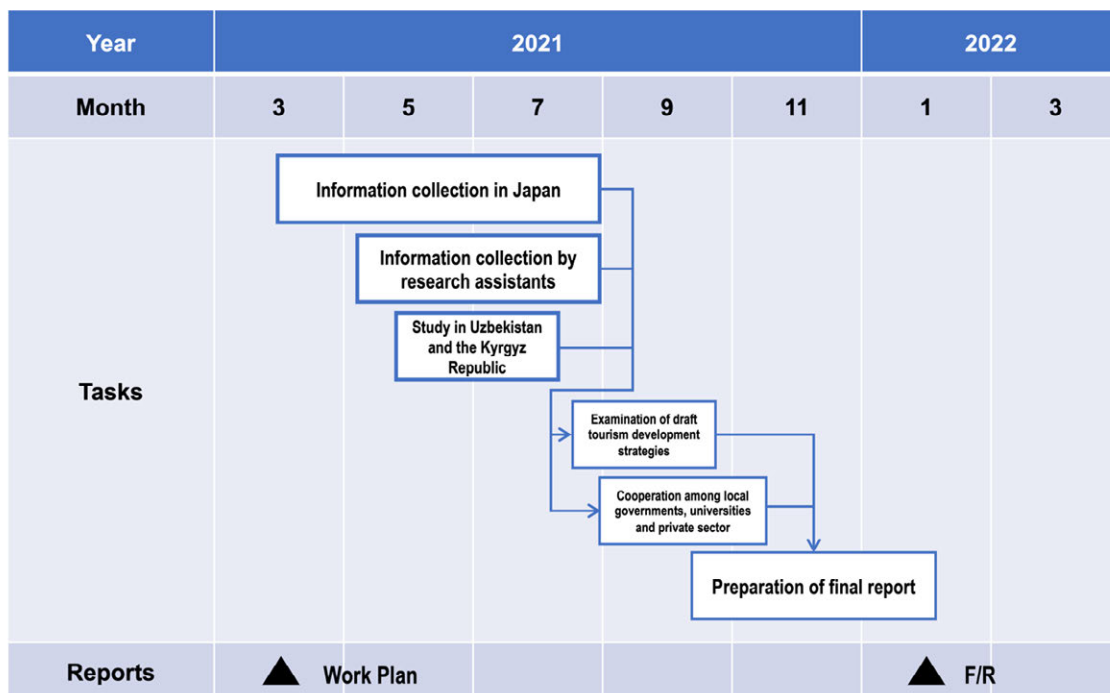
<sup>1</sup> Based on ADB Key Indicators 2020 Edition. The beginning of the Work Plan also includes socioeconomic and tourism statistics for five Central Asian countries.

- Information to understand the overall trends in the tourism sector in the five Central Asian countries
- Examination of draft tourism development strategies for Central Asia, and
- Information on cooperation by local governments, higher education institutes, and private sector between the Central Asian countries and Japan.

The target countries are Uzbekistan, the Kyrgyz Republic, Kazakhstan, Turkmenistan, and Tajikistan. The study area covers five Central Asian countries, but the draft tourism development strategy at the national level focuses on Uzbekistan, Kyrgyz Republic, and Kazakhstan. The field study covers Uzbekistan and the Kyrgyz Republic.

### Survey schedule

The survey started in late March 2021. Due to the global spread of COVID-19, information collection on the five Central Asian countries began with remote interviews with Japanese tour companies, local governments, universities, and private companies, as well as a search of websites and digital documents. Then, hired research assistants in each country collected statistics and reports in local languages and conducted questionnaire surveys to public, private, and academic institutions related to tourism.



Source: Study team

**Figure 1 Study schedule**

The study team visited Uzbekistan and the Kyrgyz Republic during June and July 2021 and interviewed government and private sectors and development partners involved in tourism in both countries. In

addition, the study team visited Samarkand in Uzbekistan, and the Silk Road World Heritage site, the area of Issyk-Kul Lake, and Lake Song Kul in the Kyrgyz Republic.

From August 2021 onward, the study team analyzed the collected information and examined the draft tourism development strategy. After October 2021, the final report was compiled and submitted in late January 2022.

### **Composition of this report**

The final report consists of two parts: Part 1 and Part 2. Part 1 summarizes the situation of the tourism sector in Uzbekistan, the Kyrgyz Republic, Kazakhstan, Turkmenistan, and Tajikistan. Subjects such as Tourism development policies and institutions, tourism market, tourism economy, tourism resources, and products, tourism facilities, tourism infrastructure, marketing and promotion, human resource development and tourism services, tourism-related organizations, international cooperation on tourism, the impact of COVID-19 and countermeasures, and collaboration between local governments, universities, and private companies in Central Asia and Japan are compiled into one chapter in Part 1. The final chapter of Part 1 summarizes the efforts of regional tourism organizations in the world and DMOs in Japan, which can be used as a reference when promoting regional tourism development in Central Asia.

Part 2 summarizes the direction of tourism development in Central Asia and the five Central Asian countries, including the reasons for the development and promotion of tourism in the region as a whole, and the potentials and challenges of the tourism sectors in Uzbekistan, the Kyrgyz Republic, and Kazakhstan. Chapter 2 describes the draft tourism development strategies for Central Asia, Uzbekistan, the Kyrgyz Republic, and Kazakhstan. Chapter 3 summarizes the tourism routes that cross over several countries. Chapter 4 describes the necessary efforts to strengthen the cooperation between local governments, universities, and private companies in Central Asia and Japan.



# **PART 1: Overview of the Tourism Sector in Central Asia**



## 1. Tourism development policies and institutions

This chapter provides an overview of the development plans and tourism legislation in the tourism sector in the five Central Asian countries. At the five-country level, this report will focus on the tourism development strategies and plans prepared within the Central Asia Region Economic Cooperation (CAREC) and the legal system relating to tourism and the tourism development strategies at the country level.

### 1.1. CAREC Tourism Strategy 2030

Central Asia Region Economic Cooperation (CAREC) is a regional cooperative development initiative with 11 member countries (Afghanistan, Azerbaijan, China, Georgia, Kazakhstan, Kyrgyzstan, Mongolia, Pakistan, Tajikistan, Turkmenistan, and Uzbekistan) and six partners (ADB, IBRD, IMF, EBRD, IsDB, and UNDP). The main areas of cooperation are the development of six economic corridors and the energy development, and the ADB has been serving as the secretariat since 2001.

CAREC member countries agreed to develop a new CAREC strategy for 2030 at the 16<sup>th</sup> Foreign Ministers' Meeting in October 2017, including development strategies for transport, trade, and energy. In the tourism sector, the "Promoting Regional Tourism Cooperation under CAREC 2030 A Scoping Study" was prepared in March 2019 to assess the potential and challenges of the tourism sector in the 11 CAREC member countries. In December 2020, the "The CAREC Tourism Strategy 2030" was published December 2020.

The CAREC Tourism Strategy 2030 sets out the following tourism development vision for the CAREC member country regions towards 2030.

"a sustainable, safe, easily accessible, and well-known tourism region that provides a variety of unique year-round quality experiences to visitors along the Silk Road, and widely shares its benefits among its communities."

Then the document proposed the strategies listed in Table 1.1.

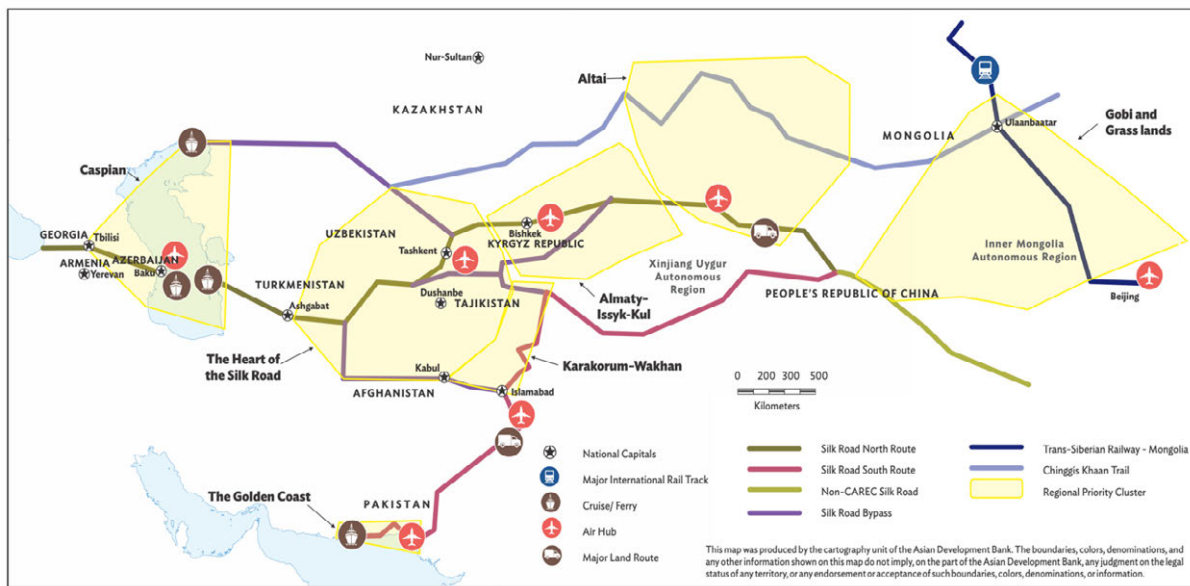
**Table 1.1: CAREC Tourism Strategy 2030 strategies and their contents**

Strategy	Description
Connectivity and Infrastructure	Connect the landlocked CAREC region with countries outside the region and connect CAREC member countries.
Quality and Standards	Support the quality of services and compliance with environmental standards for small and medium-sized enterprises (SMEs) that are the main source of tourism services in the CAREC region.
Skill Development:	Raise the skill level of public sector officers in areas such as destination management, digital marketing, development of various standards, safety, and health-related regulations, and ensuring environmental and socio-economic sustainability.
Marketing & Branding	Branding will take advantage of the Silk Road, the most critical tourism resource in the CAREC region. Branding is necessary at the level of each country and the level of a combination of countries.
Market Intelligence	To improve the ability to collect and analyze data and statistics related to

Strategy	Description
	tourism and apply them to developing tourism products and services and tourism policy.
Cross-cutting Theme	Safety and security, digitalization, gender equality, private sector development, environmental sustainability, and universal access.

Source: CAREC Tourism Strategy 2030, ADB, 2020.

The CAREC Tourism Strategy 2030 classifies the region into seven clusters, with the Silk Road running east-west through the CAREC region as the northern and southern routes. The locations and names of the seven clusters are shown in Figure 1.1.



Source: CAREC Tourism Strategy 2030, ADB, 2020.

**Figure 1.1: CAREC tourism development concept and seven clusters**

**Table 1.2: Relationship between the five Central Asian countries and the seven clusters**

Name of the cluster	Country	State / Region
Caspian	Kazakhstan Turkmenistan	Atyrau, Mangystau Balkan
Heart of Central Asia	Kazakhstan Kyrgyz Republic Tajikistan Turkmenistan Uzbekistan	Aktobe, Almaty, Atyrau, Zhambyl, Kyzylorda, Mangystau, Turkistan Batken, Jalal-Abad, Osh Dushanbe, Khatlon, Kuhistani Badakhshan, Sughd Akhal, Lebap, Mary Andijan, Bukhara, Djizzak, Ferghana, Karakalpakstan, Kashkadarya, Khorezm, Namangan, Navoy, Samarkand, Surkhandarya, Syrdarya, Tashkent
Almaty-Bishkek	Kazakhstan Kyrgyz Republic	Almaty, Zhambyl Chui, Issyk-Kul, Naryn
Karakorum-Wakhan	Tajikistan	Kuhistani Badakhshan
Altai	Kazakhstan	East Kazakhstan

Source: CAREC Tourism Strategy 2030, ADB, 2020.

Table 1.2 describes the clusters in which five Central Asian countries are included among the seven clusters. The entire country of Uzbekistan is included in the "Heart of Central Asia" cluster, which also includes southern Kazakhstan, southern Kyrgyz Republic, western Tajikistan, and the eastern half of Turkmenistan. In addition, "Almaty-Bishkek" includes southeast Kazakhstan and the northern part of



the Kyrgyz Republic. Most of the five Central Asian countries are included in these two clusters.

The CAREC Tourism Strategy 2030 lists the tourism-related investment projects and programs to be implemented between 2021 and 2025 as the "Regional Tourism Investment Framework (2021-2025)," which is based on the strategy mentioned above. The list is organized by Strategic Pillar (Connectivity and Infrastructure, Quality and Standards, Skills Development, Marketing and Branding, Market Intelligence). Table 1.3 shows a typical example of these project programs. Many of these project programs have only been proposed, and only a limited number have been implemented.

**Table 1.3: Examples of projects and programs in the "Regional Tourism Investment Framework (2021-2025)"**

Strategic Pillar	Examples of Project Programs
Connectivity and Infrastructure	<ul style="list-style-type: none"> <li>- Introduction of Low-Cost Carriers in the CAREC</li> <li>- Enhancing the hub function of the "Heart of Central Asia" cluster at Tashkent Airport</li> <li>- Research and pilot projects for the implementation of the Silk Road Visa.</li> <li>- Border facility improvements</li> <li>- Main road improvements</li> <li>- Development of tourist facilities</li> </ul>
Quality and Standards	<ul style="list-style-type: none"> <li>- Introduction of hotel ratings and health and safety standards (COVID-19 measures)</li> <li>- Development of the "Silk Road Quality Label" and implementation of a pilot project</li> <li>- Provide training to SMEs and women's entrepreneurial groups</li> </ul>
Skills Development	<ul style="list-style-type: none"> <li>- Providing training to tourism professionals, lecturers, and students</li> <li>- Creation and introduction of a common curriculum for tourism training</li> <li>- Training on COVID-19 countermeasure safety protocol implementation monitoring</li> <li>- Training of tourist guides</li> </ul>
Marketing and Branding	<ul style="list-style-type: none"> <li>- Development of the CAREC tourism web portal</li> <li>- Create guidelines and strategies for the "Visit Silk Road" brand</li> <li>- Promotion in cooperation with famous digital platforms</li> </ul>
Market Intelligence	<ul style="list-style-type: none"> <li>- Training in tourism data collection and statistical data preparation</li> <li>- Training in creating a Tourism Satellite Account (TSA)</li> <li>- Support for conducting and analyzing tourist surveys</li> </ul>

Source: compiled by the survey team from CAREC Tourism Strategy 2030

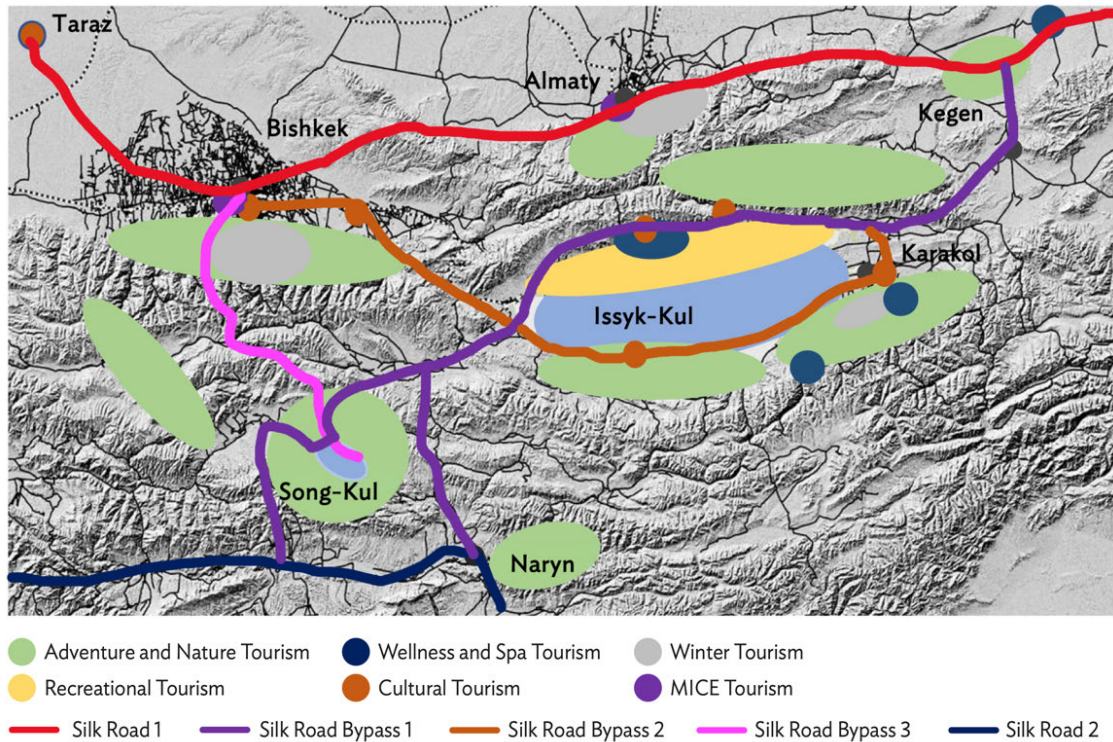
## 1.2. Almaty-Bishkek Economic Corridor Tourism Master Plan

Almaty in Kazakhstan and the areas around Bishkek and Lake Issyk-Kul in the Kyrgyz Republic were named the Almaty-Bishkek Economic Corridor (ABEC) in the CAREC program and have been treated as a pilot economic corridor since 2014. The region has historical and natural tourism resources. Combining mountain sports such as ski resorts with residential tourism at Issyk-Kul Lake can promote tourism investment and alleviate seasonality issues. In December 2019, the "Almaty-Bishkek Economic Corridor Tourism Master Plan" was prepared and released with the support of ADB.

The Master Plan estimates that 8.4 million tourists visited ABEC in 2017<sup>1</sup>. In the base case, the number of visitors in 2040 will be only 14 million. Still, the number of visitors can be increased up to 2.3 million

<sup>1</sup> This figure is the total of domestic tourists and international visitors. Estimated figures of domestic tourists and international visitors for both countries are as follows: 3.65 million for Kazakhstan (2.08 million domestic tourists, 1.57 million international visitors); 4.76 million for Kyrgyz Republic (1.1 million domestic tourists, 3.66 million international visitors).

by a combination of tourism policy reforms, implementation of public and private investment projects, reduction of travel time between Almaty and Bishkek, and enhancement of the Almaty airport hub. The report states that the number of tourists can be increased up to 2,3 million. It then proposes the formation of a tourism cluster in the ABEC region with tourism routes (Silk Road and Silk Road Bypass) and features such as adventure/nature, wellness/spa, winter sports, recreation, culture, and MICE, as shown in Figure 1.2.



Source: Almaty - Bishkek Economic Corridor Tourism Master Plan, ADB, 2019

**Figure 1.2: Proposed tourism cluster in Almaty-Bishkek Economic Corridor**

The final part of the master plan summarizes the amount required if tourism policy reforms and public-private investment projects are added to the base case to attract more domestic tourists and international visitors. As shown in Table 1.4, a total investment of USD3.25 billion will be required. It is impossible to confirm what kind of projects are envisioned because the annex section describing the proposed projects has not been made public.

**Table 1.4: Projects proposed in the ABEC Tourism Master Plan**

Unit: USD million

Type of the project	Feasibility study	Public investment amount	Private investment amount (including investment in PPP)	Total investment amount
Kazakhstan	99.1	773.7	1,004.4	1,877.2
Kyrgyz Republic	81.9	242.9	1,048.3	1,373.1
The whole ABEC region	181.0	1,016.6	2,052.7	3,250.2

Source: Almaty - Bishkek Economic Corridor Tourism Master Plan, ADB, 2019

### 1.3. Uzbekistan

Since independence in August 1991, the development of tourism in Uzbekistan has been driven by the first President, Islam Karimov. Tourism was identified as one of the priority sectors to lead the country's economic development, along with natural resource development and cotton-related industries. This positioning did not change under the second president, Shavkat Mirziyoyev, elected president in December 2016. Still, tourism policy reforms also progressed under an open economic policy that promoted the acceptance of investment and foreign visitors.

Table 1.5 summarizes the tourism-related laws and regulations since December 2016. Presidential decrees on accelerating tourism development, developing domestic tourism, exempting tourism visas<sup>2</sup>, and establishing the International University of Silk Road Tourism have been announced.

**Table 1.5: Delivery of tourism-related laws and regulations in recent years**

Date of announcement	Type and number of laws and regulations	Names of laws and regulations
2016/12/02	Presidential Decree No. 4861	On measures to ensure the rapid development of tourism industry of the Republic of Uzbekistan
2018/02/03	Presidential Decree No. 5326	On additional organizational measures to create favorable conditions for development of tourism potential of the Republic of Uzbekistan
2018/02/07	Presidential Decision 3514	On measures to ensure accelerated development of domestic tourism
28/06/2018	Presidential Decision 3815	On establishing The Silk Road international university of tourism
2018/07/04	Presidential Decree No. 4861	Future measures to optimize the procedures for foreigners to enter the Republic of Uzbekistan
2019/01/05	Presidential Decree No. 5611	On measures to ensure the rapid development of tourism industry of the Republic of Uzbekistan
2019/07/18	LRU-549	Law on Tourism

Source: Tourism Strategy in the Republic of Uzbekistan Promotion of Reforms through Presidential Change and Its Historical Background (1991-2019) (edited by the survey team from the Transactions of the Japan Society for International Tourism (No. 26) March 2019)

In July 2019, a new Tourism Law was enacted, replacing the old Tourism Law enacted in 1999. While the old Tourism Law was state-centric, focusing on managing tourists with an emphasis on national security, the new Tourism Law sets rules for implementing tourism as an economic activity focusing on tourists and tourism businesses. In addition, the new Tourism Law refers to the terminology used abroad and in the UNWTO to ensure that it is in line with international standards<sup>3</sup>.

Presidential Decree No. 5611, "On Additional Measures for the Accelerated Development of Tourism in the Republic of Uzbekistan," attaches "Concept of the Development of the Tourism Sector in the Republic of Uzbekistan in 2019 - 2025" as an appendix. This tourism development concept aims to transform the tourism sector into a strategic sector of the national economy by 2025 and achieve the

<sup>2</sup> Presidential Decree No. 5326, dated February 3, 2018, exempted nationals of seven countries (Japan, Singapore, Turkey, Israel, Malaysia, and Indonesia) from visa requirements for tourism of up to 30 days; Presidential Decree No. 5611, dated January 5, 2019, expanded the number of countries exempted from visa requirements to 45.

<sup>3</sup> For example, the definition of a tourist, which was defined in the former Law on Tourism as "an individual traveling (sightseeing) in the territory of the Republic of Uzbekistan or in another country", is now defined as an individual who visits a country for more than 24 hours but less than 12 months consecutively, or who stays at least one night in a temporary country.

targets listed in Table 1.6. It also seeks to increase the tourism sector's share in GDP from 2.3 percent in 2017 to 5 percent by 2025.

**Table 1.6: Key objectives of Uzbekistan's tourism development strategy**

Indicators	unit	2018	2020 (target)	2025 (target)
Number of international visitors	000 persons	5,346	7,010	11,810
Export of tourist services	USD million	1,041	1,360	2,170
The number of domestic tourists	000 trips	15,493	17,230	25,010
Number of accommodation facilities	Units	914	1,620	3,050
Number of rooms in accommodation facilities	000 rooms	20.2	35	64
Number of seats in transport facilities	000 seats	41	72	128
Number of tour operators	Units	983	1,190	1,450

Source: Lex UZ online (<https://lex.uz/ru/docs/4600563>)

The following are the directions for tourism development from 2019 to 2025.

- Improve laws and regulations relating to tourism to bring them up to international standards and create a base for developing the tourism industry.
- Improve the tourism infrastructure and tourism-related infrastructure throughout the country.
- Improve the quality of passenger services by developing domestic and international transportation routes for tourists.
- Overcome seasonality by diversifying tourism products and expanding the target group.
- -Promote domestic tourism.
- Promote tourism products to the domestic and international tourism markets and establish the image of Uzbekistan as a safe travel destination.
- Improve the training system to develop highly qualified professionals and the existing training system for tourism personnel.

Ministry of Tourism and Sports (MOTAS) intends to update the above tourism development concept shortly in light of the reorganization in April 2021 (establishment of the MOTAS by merging the State Committee for Tourism Development and the sports-related departments of the Ministry of Physical Culture and Sports) and the stagnation of the tourism sector due to the global spread of COVID-19.

#### 1.4. Kyrgyz Republic

According to the National Development Strategy of the Kyrgyz Republic for 2018 - 2040, the tourism sector is one of the priority sectors, along with mining, agroindustry, and light industry. The tourism sector is positioned as a priority development sector with mining, agroindustry, and light industry. However, in the interviews conducted with the private sector, such as travel agencies, many of them said that the Kyrgyz Republic's tourism policy is weak and not considered a priority sector. There has been minimal issuance of laws and regulations on tourism, as seen in Uzbekistan.

The Tourism Law of the Kyrgyz Republic was enacted in 1999 and has been amended three times<sup>4</sup>. The law consists of six chapters and 18 articles, including definitions of tourism-related terms, roles of government agencies in tourism, rights and obligations of tourism-related organizations and tourists, financial resource for tourism development, safety and insurance related to tourism, and conservation of natural, historical, and cultural resources. Compared to the Tourism Law of Uzbekistan, the perspective of managing tourists for the sake of national security is not seen, but the perspective of promoting the tourism sector as an engine of the national economic development is not strong.

During the interviews with tourism-related organizations in Kyrgyzstan in July 2021, the survey team was informed that a working group to prepare a draft of the new tourism act has been formed and that the goal is to complete the draft document by the end of 2022. The direction of the new act is not yet clear, but it is expected to make the current simple tourism law more comprehensive by defining terms that have not been included in the law and ensuring the quality of tourism services.

**Table 1.7: Key objectives of the tourism development strategy (1)**

Indicators	Unit	2017 (base)	2020 (target)	2023 (final target)
Share of tourism activities in GDP	percent	5.0	5.6	7.0
Contribution of tourism in budget revenues	KGS million	97.0	170.0	300.0
Number of foreign tourists from the country of visa-free regime	000 persons	98.7	115.0	180.0
Export of tourist services (income from the reception of foreign citizens)	USD million	418.2	452.0	508.0
Safety Index of the World Economic Forum	Points	4.96	5.06	5.21
Number of international visitors	000 persons	4,568	5,100	6,000
Expenditures of the state budget on advertising and promotion	KGS million	7.8	55.9	122.6

Source: Prepared by the survey team from the Program of the Government of the Kyrgyz Republic on the development of the sphere of tourism for 2019-2023

The current tourism development program, "Program of the Government of the Kyrgyz Republic of development of the sphere of tourism for 2019-2023," is published as the decree on "ORDER OF THE GOVERNMENT OF THE KYRGYZ REPUBLIC of January 31, 2019, No. 36". The program states that the tourism industry should prioritize the development of the national economy and the image of Kyrgyzstan as a tourism nation and that the tourism industry should approach international standards in terms of quality of services and consideration for the natural environment. On this basis, the goal is to increase the share of the tourism-related industry in GDP from 5.0 percent in 2017 to 7.0 percent in 2023, as shown in Table 1.7

The current tourism development program also aims to ensure that tourism contributes to tourism-related industries and the local economy. Therefore, the number of tourism-related enterprises per province is set as a target value, as shown in Table 1.8.

**Table 1.8: Key objectives of the tourism development strategy (2)**

Region/city	2018	2020	2023
Batken	649	785	1,045

<sup>4</sup> More recently, the Law on Tourism was amended in May 2017.

Jalal-Abad	919	1,112	1,480
Issyk-Kui	1,704	2,063	2,746
Naryn	431	521	yakuza
Osh	820	992	1,320
Talas	268	325	433
Chui	1,183	1,431	1,904

Source: Prepared by the survey team from the Program of the Government of the Kyrgyz Republic on the development of the sphere of tourism for 2019-2023

In order to achieve the objectives in Table 1.7 and Table 1.8, the current tourism development program has identified the following items as necessary initiatives in the tourism sector.

- Conduct marketing activities to position the Kyrgyz Republic as the center of Central Asia.
- Promote digitalization of tourism in order to use the collected data for tourism information, provision of tourism services, and analysis of the tourism economy.
- Support regional development through tourism development, aiming to achieve the regional development goals of the National Development Strategy 2018-2040.
- Promote a simple tax system and improved investment climate to encourage tourism business and investment promotion.
- Promote tourism development that takes advantage of the rich spiritual culture of the people of the Kyrgyz Republic and the diversity of their unique traditions, customs, and handicrafts.

According to an interview conducted with the Department of Tourism, Ministry of Economy and Finance in July 2021, the Department is preparing a tourism development program to 2030, which will be a successor to the current tourism development program to 2023 and is coordinating with relevant ministries. This program will be coordinated with the CAREC Tourism Strategy 2030, but due to the lack of human resources, the Department is considering asking development partners for assistance.

## 1.5. Kazakhstan

Law on Tourism in Kazakhstan was enacted in 2001 and has undergone multiple amendments. The most recent amendment was made in April 2020, and the law is shifting from a state-led tourism law for the management of tourists to one that stipulates the role of the state in guaranteeing and regulating the activities of private travel agencies. For example, there used to be clauses defining tourism products such as Youth Tourism, Religious Tourism, and Medical Tourism, but such clauses have been removed, and the law now defines the organizations, people, and services involved in tourism activities such as tourist guides, tourists, and tour agents. In addition, there was a clause defining tourism products.

Kazakhstan's tourism development strategy, "State Program for the Development of the Tourism Industry of the Republic of Kazakhstan for 2019 – 2025," was issued as a decree in May 2019. The program aims to increase the tourism sector's share in GDP to 8% by 2025, and to achieve this goal, the indicators listed in Table 1.9 have been prepared.

**Table 1.9: Key objectives of Kazakhstan's tourism development strategy**

Indicators	Unit	2017 (base)	2020 (target)	2025 (final target)
Number of international visitors	Million persons	7.7	8.1	9.1
Number of international tourists**	Million persons	0.89	1.0	3.0
Number of domestic tourists	Million persons	5.56	5.10	8.0
Number of people working in the tourism industry	000 persons	442	495	650
Tourist services	KZT billion	108	150	270
Fixed investment in the tourism sector	KZT billion	310	400	600
Ranking of WEF Travel & Tourism Competitiveness Index	-	81	-	50
Ranking of WEF TPCI Tourist Service Infrastructure	-	97	-	65
Ranking of WEF TPCI Marketing	-	102	-	70

Source: Prepared by the survey team from State Program for the Development of the Tourism Industry of the Republic of Kazakhstan for 2019-2025

This tourism development strategy deals with international visitors and international tourists separately and sets targets for each. It then sets the tourism development strategies and indicators shown in Table 1.10.

**Table 1.10: Tourism development strategy and key indicators**

Tourism Development Strategy	Examples of indicators
Development of tourism resources	- Number of institutions established for investment in priority tourism areas - Number of investment projects in the tourism sector
Ensuring access to tourist sites and facilities	- Number of air routes from abroad. - Length of highways to major cities (kilometers)
Improvement of the quality of tourism products and services	- Number of national education decrees for technical and vocational training in the tourism sector - Number of medical facilities accepting patients from abroad (medical tourism)
Establishment of a favorable tourism environment	- Number of countries exempted from tourist visa requirements - Time required for issuing tourist visas
Implementation of efficient domestic and international tourism promotion	- Number of countries broadcasting Kazakhstan TV channels - Number of foreign transport agencies promoting Kazakhstan tourism

Source: Prepared by the survey team from State Program for the Development of the Tourism Industry of the Republic of Kazakhstan for 2019-2025

## 1.6. Turkmenistan

Turkmenistan's medium-term socio-economic development strategy, "Programme of the President of Turkmenistan on the socio-economic development of the country in 2018-2024," states its commitment to achieving the 2030 Agenda (Sustainable Development Goals) and accelerating economic growth. The focus of economic activity is the export of fossil fuels, natural resources, and agricultural products. Tourism development is mentioned along with the promotion of healthy living and sports for the people, but it is not positioned as an important sector. The strategy also includes a target for the number of international visitors, but the target remains largely constant: 113,000 in 2018 to 114,500 in 2024.

Law on Tourism in Turkmenistan was enacted in 2010 and has been amended several times. This law consists of nine chapters and 50 articles and covers many topics along with Uzbekistan's new tourism law. It stipulates the role of the government in the tourism sector, the establishment of tourism

development zones, the registration and licensing system for the private sector, contracts in tourism activities, economic activities associated with tourism, and the protection of natural resources and historical and cultural sites. Since it was enacted relatively recently, it is the second most modern tourism law in Uzbekistan.

Turkmenistan's Tourism Law was enacted in 2010 and amended several times since then. The law consists of nine chapters and 50 articles and covers many items, along with Uzbekistan's new tourism law, the most comprehensive among the five Central Asian countries. It stipulates the role of the government in the tourism sector, the establishment of tourism development zones, the registration and licensing system for the private sector, contracts in tourism activities, economic activities associated with tourism, and the protection of natural resources and historical and cultural sites. Since it was enacted in a relatively new period, it is the second most modern tourism law in Uzbekistan.

Turkmenistan's tourism development strategy is "National Programme of Support and Development of Tourism in Turkmenistan for 2011-2020". This strategy covers the period up to 2020, but the subsequent tourism development strategy has not yet been published. This tourism strategy sets the following goals:

- Aim to invite more than 114,000 international visitors by 2025.
- Promote digitalization of administrative processes in the hotel sector, including electronic registration of travelers.
- Promote registration of hotels in Turkmenistan on international Internet marketing platforms.
- Promote training and retraining of human resources in the tourism sector in accordance with international standards and best practices in cooperation with CAREC.
- Attract investments for infrastructure development around historical monuments.

## 1.7. Tajikistan

Tajikistan's medium-term national development plan, "National Development Strategy of the Republic of Tajikistan for the Period up to 2030", enacted in December 2016, aims to achieve annual economic growth of 7% to 8%. The power sector and agroindustry are listed as priority industries, while tourism is not mentioned. Nevertheless, the tourism sector is targeted to gradually increase its share of GDP by developing tourism that takes advantage of the country's abundant natural resources<sup>5</sup>.

The current tourism law of Tajikistan is new, which came into force in August 2020. It consists of seven chapters and 38 articles and set (1) definition of terms such as tourism products, organizations, individuals, and services related to tourism; (2) the role of the central government, local government, and government agencies in the tourism sector; (3) government regulations in the tourism sector; (4) rights and responsibilities in tourism services; (5) and economic transactions in the tourism sector.

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<sup>5</sup> There are no specific numerical targets for tourism sector development.



Although it is a new law, it provides the state with control over the tourism sector.

Tajikistan's tourism development strategy is the "Tourism Development Strategy of the Republic of Tajikistan for the Period to 2030", enacted as a decree in August 2018. The strategy states that by 2030, Tajikistan will be recognized by the global tourism market as a sustainable tourism destination. The tourism sector will occupy a specific role in the GDP, and that the tourism industry will be developed to contribute to employment generation and rural development. On top of that, the targets are set for the year 2030, as shown in Table 1.11.

**Table 1.11: Key objectives of Tajikistan's tourism development strategy**

Indicators	Unit	2017 (base)	2020 (target)	2030 (final target)
Number of international visitors	000 persons	430.9	1,000	2,500
Share of the tourism sector in GDP	percent	1.2	5.0	8.0
Share of tourist services to the total export	percent	6.2	8.0	15.0
Share of the tourism sector in the investment	percent	0.07	2.0	10.0
Share of the tourism sector in the state budget revenue	percent	0.046	1.0	3.0
Tourism service	TJS million	1,906.8	4,425.0	11,862.6
Number of registered entities providing services in creation and treatment	Units	230	300	500
Share of the tourism industry in total employment	percent	0.6	2.0	10.0
Tajikistan's position in the ranking of the WWF TTC Index	-	107/136	90/136	50/136

Source: Compiled by the survey team from Tourism Development Strategy of the Republic of Tajikistan for the period to 2030

In order to achieve these goals, this tourism development strategy sets forth the following initiatives.

- Establish an institutional framework for the development of the tourism industry.
- Develop a modern tourism infrastructure.
- Strengthen tourism potential and ensure proper implementation of comprehensive promotion.
- Ensure the competitiveness of tourism products by improving the quality of services
- Identify the tourism brand of Tajikistan and use it for the promotion of tourism products
- Achieve a balance between protection and utilization of natural resources and historical and cultural heritage
- Strengthen human resources, human resources, and employment in the tourism industry
- Comply with international standards and ensure the safety of tourists.
- Provide innovation and investment for the creation and development of tourism clusters and the development of the tourism industry.

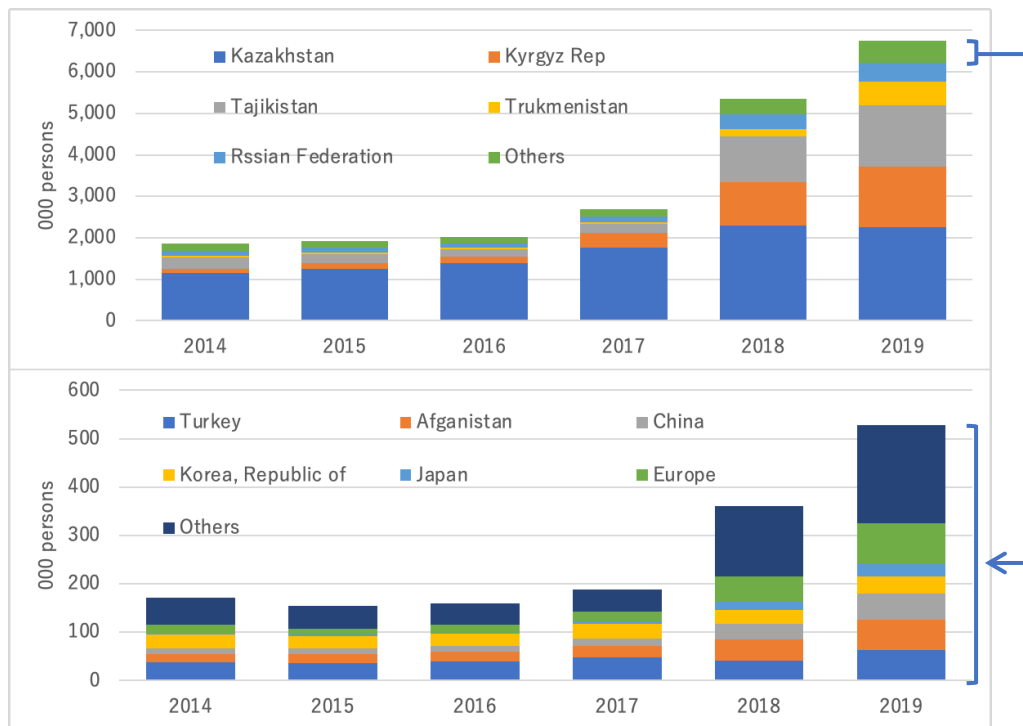


## 2. Tourism market

This chapter provides an overview of the recent trends of international visitors, international tourists, and domestic tourists in the five Central Asia countries. The characteristics of the visitors (origin, the purpose of visit, etc.) will also be reviewed, and efforts will be made to identify the differences between day-trip visitors and overnight tourists.

### 2.1. Uzbekistan

Figure 2.1 shows the number of international visitors to Uzbekistan between 2014 and 2019; the two bar graphs are side by side, and the "Others" (green area) in the top graph is enlarged in the bottom graph. The number of international visitors to Uzbekistan was around 2 million until 2016 but began to increase in 2017, reaching 5.35 million in 2018 and 6.75 million in 2019. Such rapid growth can be attributed mainly to the introduction of open economic policies, such as accelerated tourism development and exemption of tourism visas under President Shavkat Mirziyoyev, as mentioned in section 1.3.



Source: Yearbook of Tourism Statistics 2000 Edition & 2021 Edition, UNWTO

**Figure 2.1: International visitors to Uzbekistan**

Figure 2.1 shows that visitors from neighboring countries and Russia have increased by several hundred thousand to one million, respectively. Among the "other" countries, Afghanistan, China, Japan, and Europe<sup>1</sup> showed higher increase rates.

<sup>1</sup> For the purposes of this analysis, "Europe" is defined as Germany, France, the United Kingdom, and Italy. This definition applies not only to Uzbekistan, but also to the Kyrgyz Republic and Tajikistan.

**Table 2.1: Purpose of visit to Uzbekistan**

Purposes	2016	2017	2018	2019		
				Total	From CIS	From others
Business*	149,708	159,944	56,515	53,117	23,509	29,608
study	6,261	6,912	14,633	21,383	19,468	1,915
travel	175,534	203,695	458,119	1,043,929	689,576	354,353
Visit relatives	1,651,208	2,272,346	4,713,479	5,520,719	5,457,503	63,216
Medical treatment	27,149	28,705	52,527	55,490	55,346	144
Commercial*	17,175	18,472	50,946	53,874	14,708	39,166
total	2,027,035	2,690,074	5,346,219	6,748,512	6,260,110	488,402

Note: \* Business is a visit associated with meetings and business activities, while Commercial is a visit associated with the buying and selling goods, such as the purchase of merchandise.

Source: Uzbekistan Tourism 2019, State Committee of the Republic of Uzbekistan on Statistics, 2000

Thus, the number of international visitors to Uzbekistan has been increasing. Still, most of them are from neighboring countries, and it is not clear whether this increase will directly contribute to the tourism economy. Table 2.1 shows the purpose of visiting Uzbekistan, and more than 80% of the respondents answered that they were visiting relatives or friends, and this ratio has not changed significantly. On the other hand, visitors who state travel as their visit are gradually increasing their share from 9% in 2016 to 15% in 2019. Statistical data in 2019 also records the purpose of visits from the Commonwealth of Independent States<sup>2</sup> (CIS) and the rest of the world. 87% of visitors from the CIS were visiting relatives or acquaintances, and 11% were traveling. On the other hand, 13% were to visit relatives or friends for visitors from outside the CIS, and 73% were to travel.

**Table 2.2: Domestic tourist generation in Uzbekistan (2018)**

Unit: 000 trips

Region/city	Total	Council of Labor Unions Federation	Youth Union	Makhallya Fund and Women's Committee	Public and religious organizations	Business entities	independent
Republic of Karakalpakstan	1,048	384	204	143	89	158	70
Andijan Region	1,020	111	114	155	160	210	270
Bukhara Region	1,615	150	200	106	69		1,090
Jizak Region	1,054	310	100	74	225	155	190
Kashkadarya Region	1,081	300	115	115	153	138	260
Navoiy Region	500	61	78	48	49	79	185
Namangan Region	1,002	101	114	156	136	275	220
Samarkand Region	1,600	70	125	48	135	22	1,200
Syrdarya Region	504	65	89	79	40	186	45
Surkhandarya Region	1,089	160	220	235	179	125	170
Tashkent Region	1,087	89	83	3	9	3	900
Fergana Region	1,016	170	76	26	59	275	410
Khorezm Region	1,606	115	120	43	38	190	1,100
Tashkent City	1,265	140	250	242	306	137	190
Total	15,487	2,226	1,888	1,473	1,647	1,953	6,300

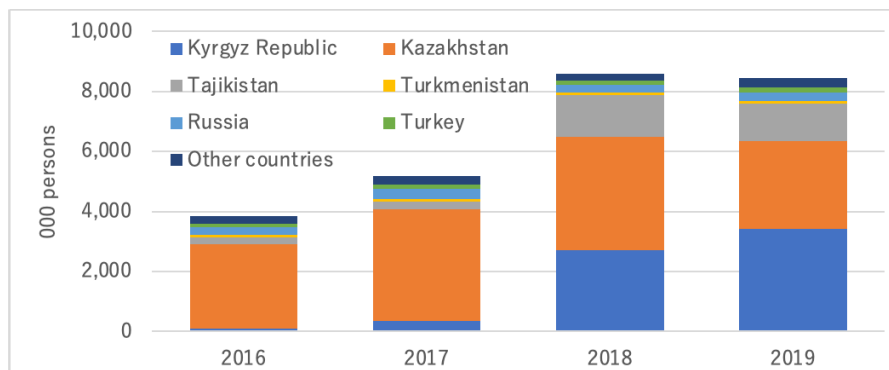
Source: Tourism in Uzbekistan 2018, The State Committee of the Republic of Uzbekistan for Tourism Development, 2019

According to the 2021 edition of UNWTO's "Compendium of Tourism Statistics," the number of domestic tourists in Uzbekistan in 2018 and 2019 was 119 million and 109 million, respectively. However, this figure seems excessive and around 15.5 million, as listed in Tourism in Uzbekistan 2018,

<sup>2</sup> The Commonwealth of Independent States is the commonwealth of the republics that made up the Soviet Socialist Federal Republic in the past.

is moderate according to the MOTAS tourism statistician. Table 2.2 shows the sources of domestic tourists by region and organization. Domestic tourism by youth, women, business, and other groups accounts for about 60% of the total. This figure is also treated as domestic tourism generation in Uzbekistan's medium-term tourism development strategy shown in section 1.3, aiming to increase domestic tourism generation to 25 million by 2025 (see Table 1.6).

At the same time, as the number of international visitors has increased rapidly, the number of Uzbekistanis visiting abroad has also grown rapidly since 2018. Figure 2.2 shows the evolution of the number of visitors abroad from 2016 to 2019 and shows the rapid increase in visitors to the Kyrgyz Republic and Tajikistan. Such rapid growth can be attributed to the improved relations with the two countries since the inauguration of President Shavkat Mirziyoyev, which has led to increased movements of people and goods to and from regions, such as the Fergana Region in the Kyrgyz Republic and Sogd Province in Tajikistan.



Source: Uzbekistan Tourism 2019, State Committee of the Republic of Uzbekistan on Statistics, 2000

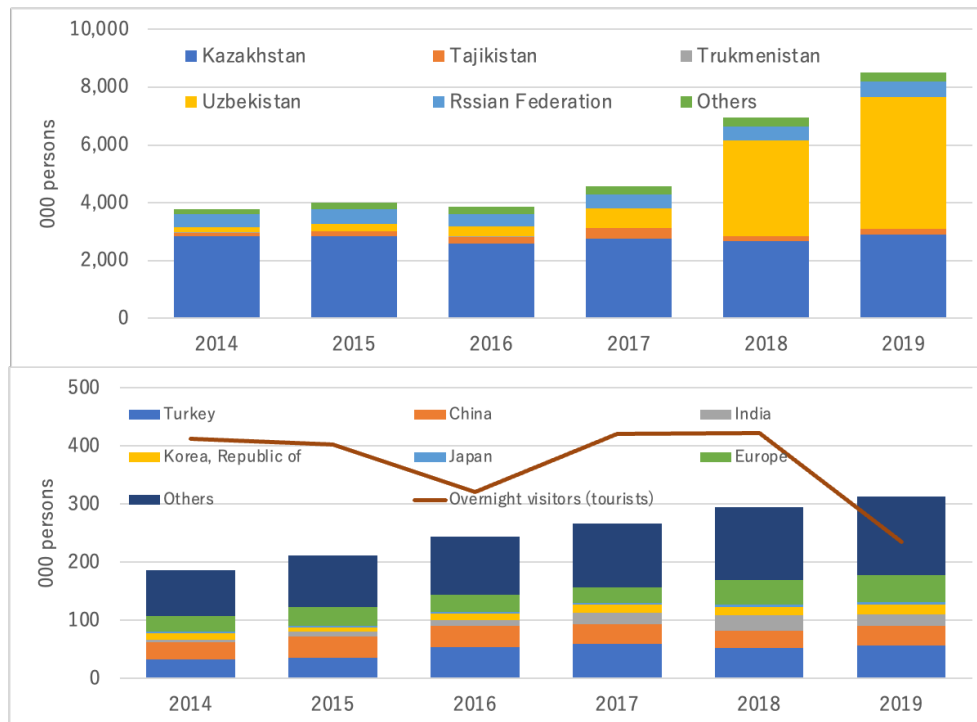
**Figure 2.2: Overseas visitors from Uzbekistan**

## 2.2. Kyrgyz Republic

The trend of international visitors to the Kyrgyz Republic in recent years is shown in Figure 2.3. The number of international visitors has the same characteristics as in Uzbekistan, with visitors from Central Asia and the Russian Federation accounting for more than 95% of the total.

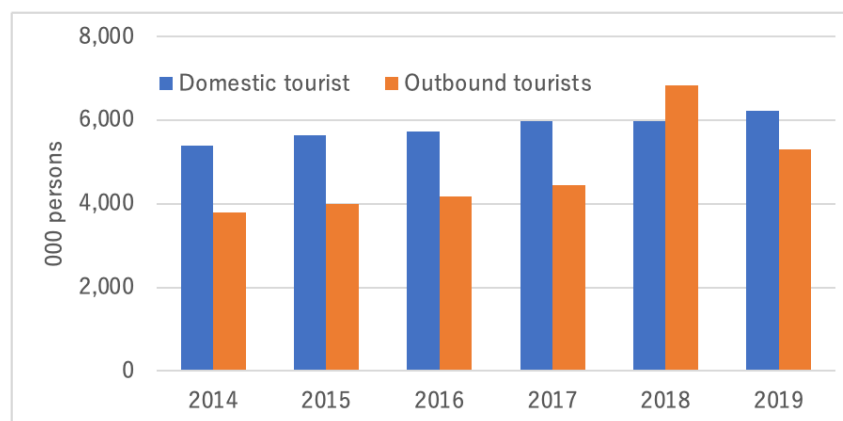
The number of international visitors was 6.9 million in 2018 and 8.5 million in 2019, an increase of 2.4 million and 1.6 million, respectively, over the previous year, most of which came from Uzbekistan. At the same time, the number of visitors from neighboring countries and non-Russian countries, included in the "Others" category in the graph above, is gradually increasing.

According to UNWTO statistics, the Kyrgyz Republic records two categories of visitors: "same-day visitors (excursionists)" who stay less than 24 hours and "overnight visitors (tourists)" who stay more than 24 hours. The line graph in Figure 2.3 shows the trend of overnight visitors (tourists). The level is between 300,000 and 400,000 except for 2019, which is the size of people contributing to the tourism economy.



Source: Yearbook of Tourism Statistics 2000 Edition & 2021 Edition, UNWTO  
**Figure 2.3: International visitors to the Kyrgyz Republic**

Figure 2.4 shows the evolution of domestic tourism generation in the Kyrgyz Republic and the number of visitors from Kyrgyzstan to foreign countries; between 2014 and 2019, domestic tourism generation increased from 5.4 million to 6.2 million, and the number of visitors to foreign countries increased from 3.8 million to 5.3 million.

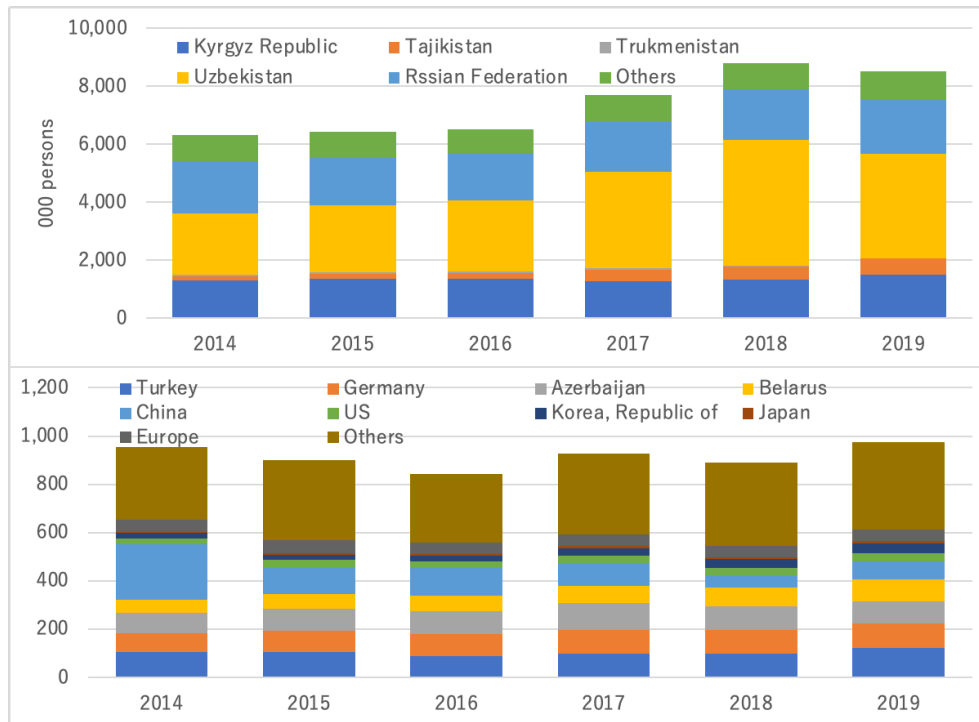


Source: Yearbook of Tourism Statistics 2000 Edition & 2021 Edition, UNWTO  
**Figure 2.4: Domestic tourism generation and overseas visitors in the Kyrgyz Republic**

### 2.3. Kazakhstan

Figure 2.5 shows the trend of international visitors to Kazakhstan. The number of international visitors has risen from around 6.5 million in 2014-16 to 7.7 million in 2017 and over 8.5 million in 2018 and 19. This increase is mainly due to the rise in visitors from Uzbekistan and Tajikistan. On the other hand, the

number of visitors from "Others" did not change significantly, from 960,000 in 2014 to 970,000 in 2019. The number of visitors even dropped 840,000 in 2016.



Source: Yearbook of Tourism Statistics 2000 Edition & 2021 Edition, UNWTO

**Figure 2.5: International visitors to Kazakhstan**

Looking at the trends for each country, the number of visitors from China has decreased from 230,000 in 2014 to 50,000 in 2018. On the other hand, many visitors are from Germany<sup>3</sup>, Azerbaijan, Belarus, and the United States. Those may be business-related visitors, such as urban development and natural resource development in Kazakhstan. Table 2.3 shows the statistics of the Statistical Committee of the Ministry of Economy "Kazakhstan Tourism 2015-2019", which describes the purpose of international visitors to Kazakhstan. The percentage of visitors for "business & professional" purposes is 14% to 17%, much higher than the percentage of visitors for business purposes in Uzbekistan shown in Table 2.1. On the other hand, the number of visitors for tourism purposes is around 50,000 to 80,000, only 1% of the total number of visitors.

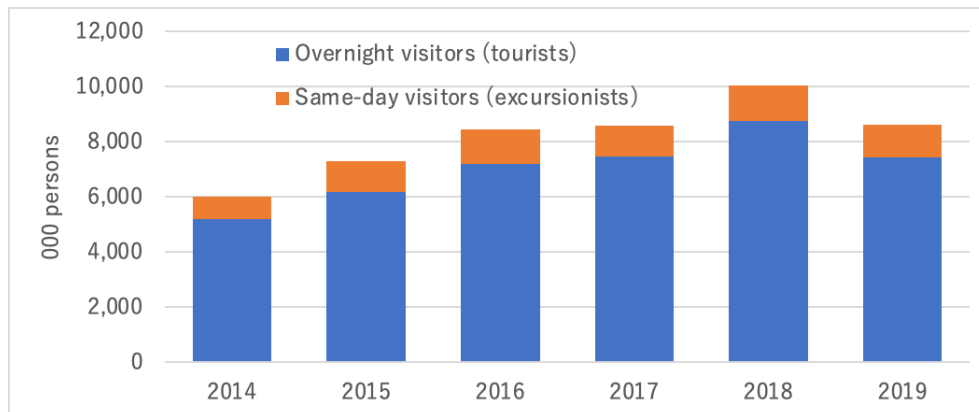
**Table 2.3: Purpose of visit to Kazakhstan**

Purposes	2015	2016	2017	2018	2019
Total	6,430,158	6,509,390	7,701,196	8,789,314	8,514,989
Business and professional	1,044,743	1,096,899	1,186,542	1,223,324	1,453,440
Tourism	54,374	56,228	81,635	65,822	76,203
Private	4,839,040	4,814,757	5,853,816	6,865,255	6,341,598
Transit	492,002	541,507	579,203	634,913	643,748

Source: Kazakhstan Tourism 2015-2019, Committee on Statistics of the Ministry of National Economy of the Republic of Kazakhstan

<sup>3</sup> In the analysis of Uzbekistan, the Kyrgyz Republic, and Tajikistan, Germany is grouped together with France, Italy, and the United Kingdom as "Europe," but for Kazakhstan, Germany is treated as a single country because it has about twice as many visitors as the other three countries combined.

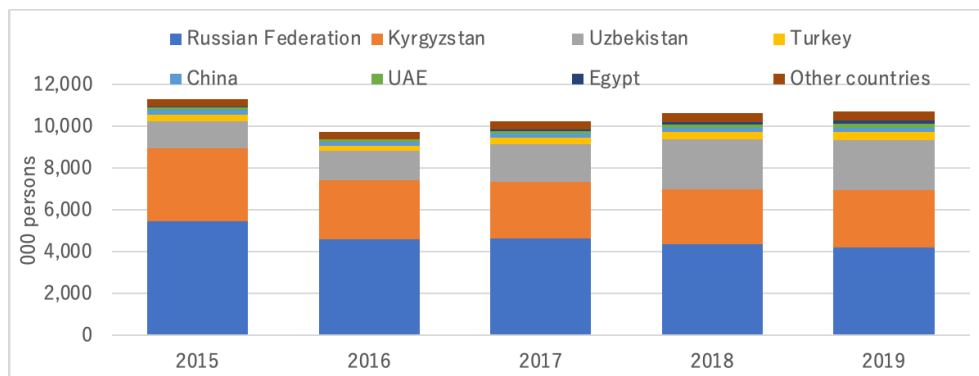
Figure 2.6 shows the evolution of domestic tourism generation in Kazakhstan, as recorded in UNWTO statistics. Domestic tourism generation has increased from 6.0 million in 2014 to 8.6 million in 2019, with about 85% of these tourists staying overnight. On the other hand, Kazakhstan Tourism 2015-2019 estimates 6.7 million overnight visitors in 2019 based on accommodation, sanatoriums, and protected areas.



Source: Yearbook of Tourism Statistics 2000 Edition & 2021 Edition, UNWTO

**Figure 2.6: Domestic tourist generation in Kazakhstan**

Figure 2.7 shows the trend of international visitors from Kazakhstan. Around 10 million people visit the country abroad every year. The primary destinations were the Russian Federation and the Kyrgyz Republic, with those two countries accounting for nearly 80% of the total until 2016. However, visitors to Uzbekistan have been on the rise since 2017. The number of visitors to Uzbekistan increased by about 1 million between 2015 and 2019.



Source: Kazakhstan Tourism 2015-2019, Committee on Statistics of the Ministry of National economy of the Republic of Kazakhstan

**Figure 2.7: Overseas visitors from Kazakhstan**

## 2.4. Turkmenistan

The UNWTO's Yearbook of Tourism Statistics and Compendium of Tourism Statistics do not contain data for Turkmenistan (not reported by the Tajikistan government). Therefore, the survey team



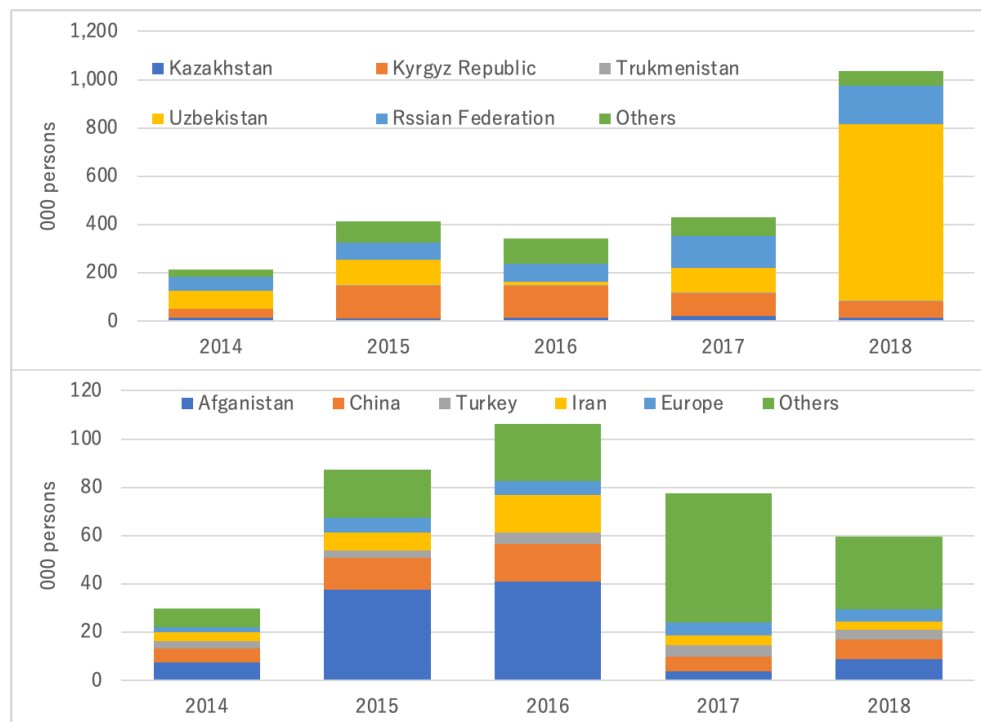
attempted to obtain the data directly through the research assistant but ultimately could not.

UNDP, with the support of UNWTO, is conducting a three-day workshop on the development of tourism statistics in December 2020<sup>4</sup>. This support was part of two projects, "Strengthening institutional and statistical capacity on national accounts" with the State Statistics Committee of Turkmenistan and "Sustainable Cities in Turkmenistan: Integrated Green Urban Development in Ashgabat and Avaza" with the Ministry of Agriculture and Environmental Protection. Thus, it is believed that Turkmenistan is attempting to produce tourism statistics in line with UNWTO standards.

According to Turkmenistan's medium-term socio-economic development strategy, "Programme of the President of Turkmenistan on the country's socio-economic development in 2018-2024" shown in section 1.6, the number of international visitors in 2018 was recorded as 113,000 in 2018. This number is quite low compared to the other four countries in Central Asia.

## 2.5. Tajikistan

Figure 2.8 shows the number of international visitors to Tajikistan. Uzbekistan, Kyrgyz Republic, and Kazakhstan have reported their tourism statistics data to UNWTO for 2019, but Tajikistan's data for the same year has not yet been reported. Therefore, Figure 2.8 deals with the five years from 2014 to 2018.



Source: Yearbook of Tourism Statistics 2000 Edition & 2021 Edition, UNWTO

**Figure 2.8: International visitors to Tajikistan**

The number of international visitors to Tajikistan ranged from 200,000 to 400,000 between 2014 and

<sup>4</sup> <https://www.tm.undp.org/content/turkmenistan/en/home/presscenter/pressreleases/2020/UNDP-supports-Turkmenistan-in-development-of-the-tourism-statistics.html>

2016. However, in 2018, visitors quickly rose to levels exceeding 1 million. The main reason for this drop is that the number of visitors from Uzbekistan, which had previously been less than 100,000, increased to more than 700,000. Looking at the change in international visitors classified as "Others" in the graph above, the number of visitors from Afghanistan, nearly 40,000 in 2015 and 2004, has declined to less than 10,000 since 2017. Except for neighboring countries and Russia, the number of visitors from most countries is at the level of a few thousand.

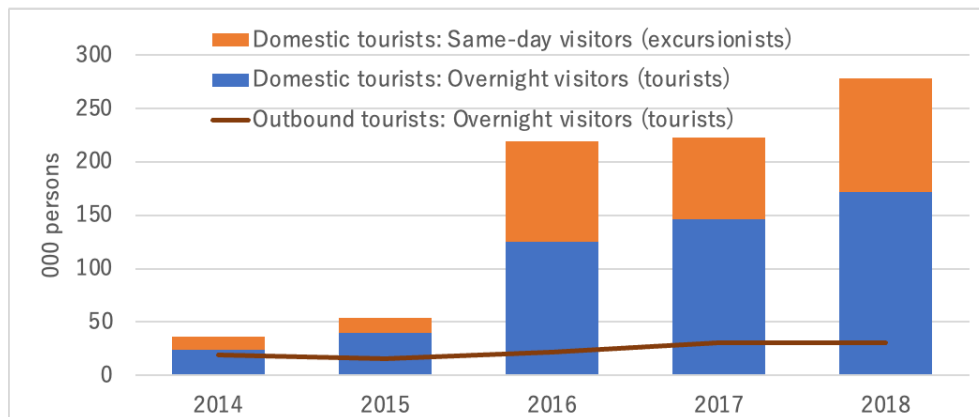
**Table 2.4: Purpose of visitors to Tajikistan**

Unit: 000 persons

Purposes of visit	2014	2015	2016	2017	2018
Holidays, leisure, and recreation	-	26	31	103	74
Other personal purposes	182	366	285	294	956
Business and professional	31	22	29	35	5

Source: Yearbook of Tourism Statistics 2000Edition & 2021 Edition, UNWTO

Table 2.4 shows the purpose of the visit to Tajikistan. Most of the visitor's purpose that increased in 2018 is also "Other personal purposes," which means visiting relatives and friends. On the other hand, "Holidays, leisure, and recreation," which indicates tourism, is also on the rise, although on a smaller scale.



Source: Yearbook of Tourism Statistics 2000Edition & 2021 Edition, UNWTO

**Figure 2.9: Domestic tourism generation and outbound tourists in Tajikistan**

Figure 2.9 shows domestic tourism generation and the outbound tourists (overnight tourists) in Tajikistan. In 2014 and 2015, domestic tourism generation was around 50,000 per year, but since 2016, it has increased rapidly to over 200,000. On the other hand, the number of overseas visitors has been minimal, ranging from 20,000 to 30,000 per year.

### 3. Tourism economy

This chapter provides an overview of the impact of the tourism sector on the economies of the five Central Asian countries. Different countries have different methods and accuracy in producing statistics on the tourism economy. Therefore, this chapter compares the tourism sector's contribution to the economy and the evaluation of the tourism industry in each country from the results analyzed by international organizations, followed by the analysis of the statistics prepared by the tourism and statistical organizations in each country.

#### 3.1. Economic Impact Report

The World Travel & Tourism Council (WTTC), an association of the world's leading tourism companies, publishes the Economic Impact Report every year to analyze the direct and indirect impacts of tourism activities on each country's economy. The 2021 edition of the report covers 185 countries, including Uzbekistan, Kyrgyz Republic, Kazakhstan, and Tajikistan. In this section, the survey team will review the figures of the four countries, and Georgia in the Caucasus region for the three leading indicators analyzed in the Economic Impact Report: receipts from international tourists, the contribution of the tourism sector to GDP, and contribution of the tourism sector to employment.

**Table 3.1: Estimation of tourist receipt**

Country	2019		2020	
	International tourist receipts and proportion to total exports (USD million; %)	Receipt from domestic tourists (USD million)	International tourist receipts and proportion to total exports (USD million; %)	Receipt from domestic tourists (USD million)
Uzbekistan	1,536 (9.8)	825.7	308 (2.0)	474
Kyrgyz Republic	588 (20.7)	285	199 (7.9)	173
Kazakhstan	2,832 (4.4)	3,279	565 (1.0)	1,890
Tajikistan	174 (16.9)	310	56 (8.7)	184
Georgia	3,398 (38.5)	1,365	575 (6.8)	741

Source: Economic Impact Report 2021, WTTC, 2021

Table 3.1 shows the receipts from international and domestic tourists in four Central Asian countries in 2019 and 2020. For comparison with the Central Asian region, the data for Georgia, which was often targeted in the interviews, especially in Uzbekistan, is also included. In 2019, excluding Kazakhstan, a significant exporter of natural resources, Uzbekistan, the Kyrgyz Republic, and Tajikistan received international tourism receipts equivalent to 10 % to 20% of their total global export amount. In the Kyrgyz Republic and Tajikistan, where exports of natural resources and other products are limited, total exports were substantial. However, due to the global outbreak of COVID-19, the amount of receipt from international tourists has decreased significantly in all countries in 2020.

On the other hand, the receipts from domestic tourists also declines. Still, the decline is not as large as the international tourism receipts, and it can be evaluated that it has played a certain role in preventing the reduction of income from tourism.

**Table 3.2: Direct and indirect contribution of tourism to GDP**

Country/Region	2019		2020	
	Share in GDP (%)	Total value added (USD million)	Share in GDP (%)	Total value added (USD million)
Uzbekistan	5.2	2,801	1.9	1,004
Kyrgyz Republic	9.6	798	4.2	340
Kazakhstan	5.2	8,903.	2.4	3,906
Tajikistan	6.4	530	3.4	275
Georgia	26.7	4,573	7.9	1,276

Source: Economic Impact Report 2021, WTTC, 2021

Table 3.2 shows tourism's direct and indirect contribution to GDP in four Central Asian countries and Georgia. The tourism sector in the Kyrgyz Republic is estimated to have generated 9.6 percent of GDP in 2019 through direct and indirect contributions, while in Uzbekistan and Kazakhstan, where mining and cotton production is well developed, the figures are not as significant at 5.2 percent for both. In 2020, the value-added generated by tourism will have fallen by less than half in both countries.

In Georgia, on the other hand, tourism is a significant contributor to the national economy, with a direct and indirect contribution of 26.7% of GDP and USD4.5 billion in value-added created by tourism in 2019.

**Table 3.3: Direct and indirect contribution of tourism to employment**

Country	2019		2020	
	Number of employees (000s)	Percentage of total employment (%)	Number of employees (000s)	Rate of total employment (%)
Uzbekistan	681	5.3	495	4.0
Kyrgyz Republic	235	10.8	169	7.9
Kazakhstan	443	5.1	339	3.9
Tajikistan	173	7.0	134	8.7
Georgia	513	29.3	380	21.8

Source: Economic Impact Report 2021, WTTC, 2021

Table 3.3 shows the direct and indirect contribution of tourism to employment. In 2019, tourism generated 680,000, 230,000, 440,000, and 170,000 jobs in Uzbekistan, Kyrgyz Republic, Kazakhstan, and Tajikistan. In the Kyrgyz Republic, in particular, it is estimated to have generated 10.8% of all jobs. In Georgia, on the other hand, it is estimated to have created nearly 30% of all jobs, or 510,000 jobs.

In 2020, the pandemic reduced employment in many countries. 180,000 of employment was lost in Uzbekistan, 100,000 in Kazakhstan, 70,000 in the Kyrgyz Republic, and 40,000 in Tajikistan. It is estimated that between 23% and 28% of jobs were lost in each country.

### 3.2. Travel and Tourism Competitiveness Index

The World Economic Forum (WEF) has been publishing the "Travel and Tourism Competitiveness Report" since 2007. The report was published annually until 2009, but since 2011 it has been published every two years. The latest edition was published in 2019, which covered 140 countries.

In this report, the competitiveness of each country's tourism sector is indexed as "Travel and Tourism

Competitiveness Index (TTCI)," and the ranking of each country is created. As shown in Table 3.4, this index has a four-tiered structure with four subindexes, 14 pillars, and 90 indicators.

**Table 3.4: Subindex and pillar of Travel and Tourism Competitiveness Index**

Subindexes	Pillars
Enable environment	- Business environment (12 indicators) - Safety and security (5 indicators) - Health and hygiene (6 indicators) - Human resources and labour market (9 indicators) - ICT readiness (8 indicators)
Travel & tourism policy and enabling conditions	- Prioritization of travel and tourism (6 indicators) - International openness (3 indicators) - Price competitiveness (4 indicators) - Environmental sustainability (10 indicators)
infrastructure	- Air transport infrastructure (6 indicators) - Ground and port infrastructure (7 indicators) - Tourist service infrastructure (4 indicators)
Natural and cultural resources	- Natural Resources (5 indicators) - Cultural resources and business travel (5 indicators)

Source: The Travel & Tourism Competitiveness Report 2019, World Economic Forum, 2019

Among the five Central Asian countries, three countries (Kyrgyz Republic, Kazakhstan, and Tajikistan) participated in the preparation of TTIC, while Uzbekistan and Turkmenistan did not. The TTIC and Pillar figures for the three participating countries and Georgia and their ranking among the participating countries (140 countries) are shown in Table 3.5.

**Table 3.5: TTCI rankings and scores for three Central Asian countries and Georgia**

Index component	Kyrgyz Republic	Kazakhstan	Tajikistan	Georgia
Overall score	110 (3.2)	80 (3.7)	104 (3.3)	68 (3.9)
Business environment	77 (4.4)	49 (4.7)	89 (4.3)	24 (5.2)
Safety and Security	96 (5.2)	63 (5.6)	60 (5.6)	25 (6.0)
Health and hygiene	55 (5.7)	12 (6.5)	63 (5.5)	41 (6.0)
Human resource and labor market	93 (4.3)	57 (4.7)	62 (4.7)	54 (4.7)
ICT readiness	98 (4.0)	60 (5.0)	115 (3.4)	63 (4.9)
Prioritization of Travel & Tourism	110 (3.8)	91 (4.3)	96 (4.3)	28 (5.2)
International openness	86 (3.0)	113 (2.5)	111 (2.5)	67 (3.4)
Price competitiveness	9 (6.1)	4 (6.3)	55 (5.6)	36 (5.7)
Environmental sustainability	123 (3.7)	118 (3.8)	113 (3.9)	76 (4.2)
Air transport infrastructure	117 (2.0)	75 (2.7)	102 (2.2)	81 (2.5)
Ground and port infrastructure	130 (2.1)	87 (2.9)	96 (2.8)	74 (3.2)
Tourist service infrastructure	128 (2.1)	90 (3.4)	131 (2.0)	41 (4.9)
natural resource	94 (2.5)	89 (2.6)	73 (2.9)	105 (2.4)
Cultural resources and business travel	82 (1.5)	65 (1.7)	107 (1.3)	79 (1.5)

Note: The numbers on the left side show the rankings among 140 countries, and the numbers in brackets indicate the index values.

Source: The Travel & Tourism Competitiveness Report 2019, World Economic Forum, 2019

The TTCI ranks the Kyrgyz Republic 110<sup>th</sup>, Kazakhstan 80<sup>th</sup>, and Tajikistan 104<sup>th</sup> among the 140 countries in the world, while Georgia is 68<sup>th</sup>. Table 3.5, cells where the ranking of each indicator is lower than the order of the overall score are grayed out, indicating that there are many similarities between the weak areas of the Kyrgyz Republic and Kazakhstan. Prioritization of Travel & Tourism, Environmental sustainability, and infrastructures are rated low. On the other hand, Price competitiveness is rated highly. Tajikistan is ranked higher than the Kyrgyz Republic and Kazakhstan in infrastructures

but is rated weak in ICT readiness, country closure, cultural resources, and business tourism. All three countries (Kyrgyz Republic, Kazakhstan, and Tajikistan) are on an upward trend in their overall score, albeit gradually.

Uzbekistan and Turkmenistan have not been assessed as they are not participating in this initiative. However, 140 countries worldwide are participating in the 2019 report, and not participating in this initiative could lower the international reputation of the tourism sector.

### 3.3. Uzbekistan

In the following sections, the survey team will review the statistics related to the tourism economy of each country. Table 3.6 and Table 3.7 show the statistics on employment in the tourism industry and tourism receipt from international tourists in Uzbekistan, as compiled in the UNWTO "Compendium of Tourism Statistics." Regarding jobs in the tourism industry, employment in hotels and other accommodation facilities and travel agencies is estimated to be 48,000 and 30,000, respectively, in 2019.

**Table 3.6: Employment in the tourism industry in Uzbekistan (UNWTO)**

Unit: 000 persons

Employment	2014	2015	2016	2017	2018	2019
Total employment	42.3	42.5	45.3	49.6	50.0	51.2
Accommodation services for visitors (hotels and similar establishments)	40.6	40.7	43.3	47.7	47.6	48.3
Other accommodation services	-.	-.	-.	-.	-.	-.
Food and beverage serving activities	-.	-.	-.	-.	-.	-.
Passenger transportation	-.	-.	-.	-.	-.	-.
Travel agencies and other reservation services activities	1.7	1.8	2.0	1.9	2.4	2.9

Source: Compendium of Tourism Statistics, 2020 Edition & 2021 Edition

**Table 3.7: Tourism revenue from international tourists in Uzbekistan (UNWTO)**

Unit: percent

Tourism receipt	2015	2016	2017	2018	2019
Estimation of inbound tourism expenditure (USD million)	688	579	835	1,314	1,679
Inbound tourism expenditure over GDP	0.8	0.7	1.4	2.7	2.9
Inbound tourism expenditure over exports of goods and services	5.8	5.5	6.7	9.3	9.9

Source: Compendium of Tourism Statistics, 2020 Edition & 2021 Edition

Tourism receipt from international tourists (exports of tourism services) is estimated to be USD1.679 billion in 2019, equivalent to 2.9% of GDP and 9.9% of exports of goods and services in the same year. Tourism receipt from international tourists was estimated at USD690 million in 2015, 0.8 percent of GDP and 5.8 percent of exports of goods and services but increased rapidly from 2018.

On the other hand, The States Committee of the Republic of Uzbekistan for Tourism Development (the predecessor of MOTAS) estimated tourism revenue from international tourists in 2018 at USD1,041 million in "Tourism in Uzbekistan 2018". Table 3.8 shows the expenditure per tourist from each country and the tourism receipt from each country.

**Table 3.8: Tourism receipt from international tourists in 2018 (State Committee)**

Countries	Average expense (USD)	Export of the tourist services (USD million)
Kazakhstan	158.3	362.9
Kyrgyz Republic	99.3	104.8
Tajikistan	60.4	66.1
Turkmenistan	104.6	17.7
Other CIS countries	635.6	258.1
Far abroad countries	709.4	230.9
total	-	1,040.9

Source: Tourism in Uzbekistan 2018, The States Committee of the Republic of Uzbekistan for Tourism Development

The above figure (USD1,041 million) is also used for the value of exports of tourism services in 2018 in Table 1.6 "Key Targets of Tourism Development Strategy of Uzbekistan" in section 1.3." The "Tourism in Uzbekistan 2018" estimates tourism receipt at USD547 million in 2017 and analyzes that the amount increased to 1.9 times in 2018.

### 3.4. Kyrgyz Republic

Table 3.9 presents statistics on employment in the tourism industry in the Kyrgyz Republic, as compiled in the UNWTO Compendium of Tourism Statistics. The total employment in the tourism industry was 8,900 in 2019, and there was little change in employment from 2014 to 2019. There are more jobs in "Other accommodation services" (3,800 persons) than in "Accommodation services for visitors" (1,600 persons). Employment in "Travel agencies and other reservation services activities" (1,500 persons) is estimated to be about the same as in the "Accommodation services for visitors."

**Table 3.9: Employment in the tourism sector in the Kyrgyz Republic (UNWTO)**

Year	Unit: 000 persons					
	2014	2015	2016	2017	2018	2019
Total	8.6	8.5	8.4	8.4	8.5	8.9
Accommodation services for visitors (hotels and similar establishments)	1.7	1.6	1.5	1.2	1.4	1.6
Other accommodation services	3.7	3.6	3.6	3.8	3.8	3.8
Food and beverage serving activities	1.2	1.1	1.1	1.2	1.1	1.3
Passenger transportation	-	-	-	-	-	-
Travel agencies and other reservation services activities	1.3	1.5	1.5	1.6	1.6	1.5
Other tourism industries	0.7	0.7	0.7	0.6	0.6	0.7

Source: Compendium of Tourism Statistics, 2020 Edition & 2021 Edition

Table 3.10 shows statistics on tourism revenue from international tourists (exports of tourism services). Tourism revenue from international tourists is estimated at USD644 million in 2019, equivalent to 8.4 percent of GDP and 22.9 percent of exports of goods and services in the same year. Both percentages are significant when compared to Uzbekistan. The trends in tourism receipt from international tourists and its ratio to GDP and total exports were at the same level from 2015 to 2018, respectively. Still, in 2019, tourism receipt was 1.4 times higher than the previous year, and the ratio to GDP and total exports also increased.

**Table 3.10: Tourism receipt from international tourists (UNWTO)**

Unit: percent

Tourism receipt	2014	2015	2016	2017	2018	2019
Inbound tourism expenditure (USD million)	423	426	432	428	459	644
Inbound tourism expenditure over GDP	6.3	7.2	7.0	6.2	6.4	8.4
Inbound tourism expenditure over exports of goods and services	14.3	19.9	19.8	18.7	18.9	22.9

Source: Compendium of Tourism Statistics, 2020 Edition & 2021 Edition

Table 3.11 shows the tourism receipts from international tourists as reported in "Tourism in Kyrgyzstan 2015-2019" published by the Statistical Committee of the Kyrgyz Republic. Each year's tourism receipts are almost at the same level as the UNWTO statistics shown in Table 3.10, but slightly lower. In the medium-term tourism development strategy of the Kyrgyz Republic, "Program of the Government of the Kyrgyz Republic of development of the sphere of tourism for 2019-2023" (see Table 1.7), the figures in Table 3.11 (USD418.2 million) are used as the tourism income from international tourists in 2017.

**Table 3.11: Tourism receipt from international tourists (Statistical Committee)**

Unit: USD million

Tourism receipt	2015	2016	2017	2018	2019
Export of tourism services	410.1	415.6	418.2	453.4	613.1
CIS countries	353.7	362.9	363.7	386.8	545.6
Countries outside the CIS	56.4	52.7	54.5	66.6	67.5

Source: Tourism in Kyrgyzstan 2015-2019, National Statistics Committee of the Kyrgyz Republic

### 3.5. Kazakhstan

Table 3.12 presents statistics on employment in the tourism industry in Kazakhstan, as compiled in the UNWTO's "Compendium of Tourism Statistics." Employment in the tourism industry is estimated, excluding food and beverage serving activities and passenger transportation. Overall employment in the tourism industry in 2018 was 119,500, with employment numbers increasing each year slightly since 2014. In the same year, hotels and other accommodation services for visitors employed 29,200 persons and other accommodation services 8,000 persons, while other tourism industries accounted for 74,900 jobs.

**Table 3.12: Employment in the tourism industry in Kazakhstan (UNWTO)**

Unit: 000 persons

Kind of businesses	2014	2015	2016	2017	2018	2019
Total	108.3	111.3	113.9	116.3	119.5	..
Accommodation services for visitors (hotels and similar establishments)	25.7	25.3	26.5	27.6	29.2	30.0
Other accommodation services	10.3	10.5	10.0	9.6	8.0	..
Food and beverage serving activities	..	..	..	..	..	..
Passenger transportation	..	..	..	..	..	..
Travel agencies and other reservation services activities	6.5	7.3	7.2	7.3	7.4	..
Other tourism industries	65.8	68.2	70.2	71.8	74.9	..

Source: Compendium of Tourism Statistics, 2020 Edition & 2021 Edition

Table 3.13 presents statistics on tourism receipts from international tourists. International tourism receipt recorded at USD2.46 billion in 2019. In the same year, tourism receipt as a percentage of GDP



and as a share of exports of goods and services was 1.6 percent and 37.6 percent, respectively. The rate of GDP has been at about the same level since 2016, while the share of exports of goods and services has increased gradually in the six years since 2014.

**Table 3.13: Tourism receipt from international tourists (UNWTO)**

Unit: percent

Tourism receipt	2014	2015	2016	2017	2018	2019
Inbound tourism expenditure (USD million)	Two thousand.	1,632	1,858	2,135	2,254	2,463
Inbound tourism expenditure over GDP	1.0	1.0	1.5	1.4	1.5	1.6
Inbound tourism expenditure over exports of services	32.0	29.7	33.5	36.2	36.2	37.6

Source: Compendium of Tourism Statistics, 2020 Edition & 2021 Edition

Table 3.14 to Table 3.16 show the statistics on export of tourism services, GDP of the tourism industry and employment in tourism industry presented in "Kazakhstan Tourism 2015-2019" by the Statistical Committee of the Ministry of National Economy of Kazakhstan. The total value of exports of tourism services in Table 3.14 is identical to the UNWTO statistics in Table 3.13. On the other hand, Table 3.14 shows the export value of tourism services separately for business and personal tourism. The export value of services associated with business tourism has remained almost constant at the level of USD300 million, while the export value of tourism services related to personal tourism has been on the increase.

**Table 3.14: Exports of tourism services and their breakdown**

Unit: USD million

Export of tourism services	2015	2016	2017	2018	2019
Total	1,632.0	1,858.5	2,135.4	2,254.6	2,463.3
Business trips	335.2	399.3	368.3	329.5	344.8
Personal trips	1,296.8	1,459.2	1,767.1	1,925.1	2,118.5

Source: Kazakhstan Tourism 2015-2019, Committee on Statistics of the Ministry of National Economy of the Republic of Kazakhstan

Table 3.15 shows the value-added created by the tourism industry in Kazakhstan and its share in GDP. While the contribution to GDP shown in Table 3.2 estimates direct and indirect value-added creation, including spillovers from the tourism industry to other industries, this table shows direct value-added creation by the tourism industry. The value-added created by the tourism industry has been increasing every year and was KZT784 billion or 1.3 percent of GDP in 2018. The value-added created by the tourism industry as a percentage of GDP is on an increasing trend.

**Table 3.15: Value-added of the tourism industry and its share in GDP**

Value-added from the tourism industry	Unit	2015	2016	2017	2018	2019
Gross value added directly generated in tourism	KZT billion	406.4	558.8	688.2	784.0	-
Share of gross value added, directly in tourism, in gross domestic product	percent	1.0	1.2	1.3	1.3	-

Source: Kazakhstan Tourism 2015-2019, Committee on Statistics of the Ministry of National Economy of the Republic of Kazakhstan

Table 3.16 shows employment in the tourism industry, particularly in travel agencies and accommodation businesses. In 2019, total employment in both businesses was estimated to be 46,000

persons, of which 30,000 persons are employed in accommodation businesses. The employment numbers estimated in Table 3.16 are in line with the UNWTO statistics in Table 3.12.

**Table 3.16: Employment in the tourism industry**

Unit: 000 persons

Kind of tourism businesses	2015	2016	2017	2018	2019
Tourism companies	7.3	7.2	7.3	7.4	7.4
Accommodations	25.3	26.5	27.6	29.2	30.0
Health resort facilities	10.5	10.0	9.6	8.0	8.8
total	43.1	43.7	44.5	44.6	46.2

Source: Kazakhstan Tourism 2015-2019, Committee on Statistics of the Ministry of National Economy of the Republic of Kazakhstan

### 3.6. Tajikistan

Table 3.17 and Table 3.18 show the statistics on employment in the tourism industry and tourism receipt from international tourists in Tajikistan, as compiled in the UNWTO's "Compendium of Tourism Statistics." The total number of employments in the tourism industry in 2018 was 23,900, and the number has been increasing gradually every year since 2015. Food and beverage serving activities (14,700 persons) and accommodation services for visitors (3,700 persons) are the two main sources of employment.

**Table 3.17: Employment in the tourism industry in Tajikistan (UNWTO)**

Unit: 000 persons

Kind of tourism businesses	2015	2016	2017	2018
Total	20.8	21.4	22.1	23.9
Accommodation services for visitors (hotels and similar establishments)	1.6	1.7	1.7	3.7
Other accommodation services	1.0	1.0	1.1	0.7
Food and beverage serving activities	16.7	17.0	17.2	17.4
Passenger transportation	0.7	0.7	0.8	0.9
Travel agencies and other reservation services activities	0.5	0.7	0.9	0.9
Other tourism industries	0.3	0.3	0.4	0.3

Source: Compendium of Tourism Statistics, 2020 Edition & 2021 Edition

Tajikistan's international tourism receipt was USD171 million in 2018, which is flat compared to the amount since 2014. Tourism receipt as a percentage of GDP has also remained flat, while the share of exports of goods and services has been declining. On the other hand, the ratio of tourism revenue to exports in 2017 was 6.2 percent, as shown in Table 1.11, which is significantly different from this estimate according to the "Medium-term Tourism Development Strategy of the Republic of Tajikistan for the Period to 2030."

**Table 3.18: Tourism revenue from international tourists in Tajikistan (UNWTO)**

Unit: percent

Tourist receipt	2014	2015	2016	2017	2018
Inbound tourism expenditure (USD million)	220	146	150	172	171
Inbound tourism expenditure over GDP	2.4	1.9	2.2	2.4	2.3
Inbound tourism expenditure over exports of goods and services	26.3	17.7	16.6	15.3	15.3

Source: Compendium of Tourism Statistics, 2020 Edition & 2021 Edition

## 4. Tourism resources and tourism products

### 4.1. Five Central Asian countries

Observing the tourism resources of the five Central Asia countries, this region shows a history of the rise and fall of various kingdoms since BC and the crossroads of trade culture through the Silk Road. In addition, the region is blessed with dynamic natural resources, ranging from 7,000-meter mountains, lakes, and marshes scattered across highlands to deserts that become minus zero above sea level.

Some World Heritage sites, such as the "Western Tien-Shan" and the "Silk Roads: the Routes Network of Chang'an-Tianshan Corridor," shown in Table 4.1 and Figure 4.1, are located in more than one country. Recently, there have been active moves to apply for World Heritage registration across multiple countries (see Table 4.2: Tentative List of World Heritage in the Central Asia countries). There are also many intangible cultural heritages common to various countries. They share cultural values, such as nomadic culture, between Kazakhstan and Kyrgyz, and Sogd culture between Uzbekistan and Tajikistan, as shown in Table 4.3.

**Table 4.1: World Heritage sites in the Central Asia countries**

Country	Name	Classification	Year of registration
Kazakhstan, Kyrgyzstan, Uzbekistan	CA-A1 Western Tian-Shan	Natural heritage	2016
Kazakhstan, Kyrgyzstan	CA-A2 Silk Roads: the Trade Route Network of Chang'an-Tianshan Corridor	Cultural heritage	2014

Source: Prepared by the survey team from the World Heritage Centre website (<http://whc.unesco.org>)

**Table 4.2: Tentative List of World Heritage in the Central Asia countries**

Country	Name	Classification	Year of registration
Kazakhstan, Uzbekistan, Turkmenistan	CA-B1 Cold winter deserts of Turan	Natural heritage	2020 -2021
Uzbekistan, Tajikistan, Turkmenistan	CA-B2 Silk Roads: Zarafshan - Karakum Corridor	Cultural heritage	2021

Source: Prepared by the survey team from the World Heritage Tentative List (<https://whc.unesco.org/en/tentativelists/>)

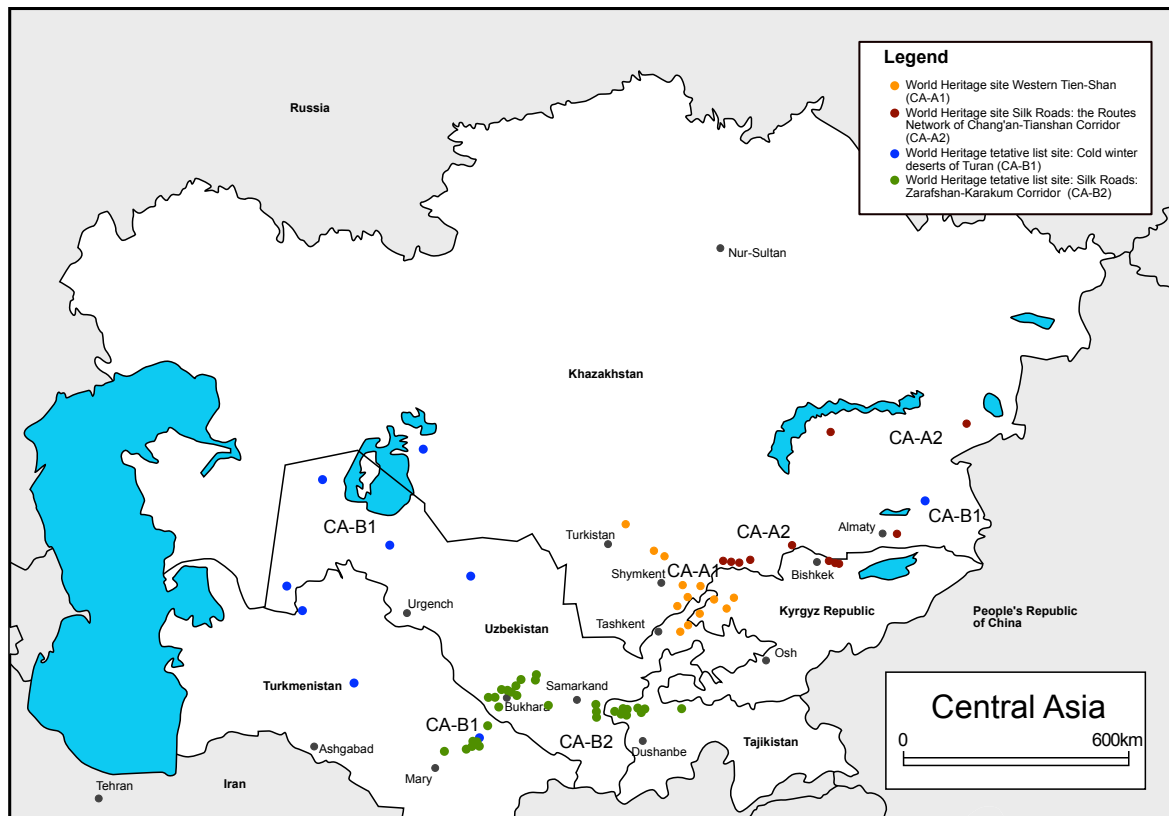
**Table 4.3: List of Intangible Cultural Heritage across the Central Asian countries**

Country	Name	Year of registration
Kazakhstan, Kyrgyzstan, Uzbekistan, Tajikistan, Turkmenistan, etc.	CA-C1 auryz, Nooruz, Nowruz, Nevruz, Nowruz (March 21: New Year)	2016
Kazakhstan, Kyrgyzstan, and others	CA-C2 Flatbread Process and the Culture of Sharing: Ravash, Katirma, Jyvka, and Jyvka	2016
Kazakhstan, Kyrgyzstan, and others	CA-C3 Traditional intellectual strategy games: Togiz Kumarak, Toguz Korgur, Mangala/Gyotürme)	2020
Kazakhstan, Kyrgyzstan	CA-C4 Traditional knowledge and skills in making Kyrgyz and Kazakh yurts (Turkic nomadic dwellings)	2014
	CA-C5 Aitish/Itis, The Art of Improvisation	2015
Uzbekistan, Tajikistan	CA-C6 Shashmaqam music	2008

Source: Prepared by the survey team from the website of the Center for Intangible Cultural Heritage (<https://ich.unesco.org/en/lists>)

In addition to these historical heritages and ancient cultures, modern resorts and ski resorts have been

developed to enjoy the mountain scenery and tourism resources and products that characterize the region today, such as the remains of the Aral Sea (ship graveyard) and natural gas fields, are also being developed. In addition, the area has a diverse ecosystem, which makes it a treasure trove of valuable flora and fauna, and it has a high potential for developing new tourism products such as ecotourism and bird-watching tours.



Source: Prepared by the survey team from the World Heritage Centre website (<http://whc.unesco.org>)

**Figure 4.1: World Heritage sites and World Heritage Tentative List sites over the Central Asian countries**

## 4.2. Uzbekistan

### 4.2.1. Cultural resources

Uzbekistan's tourism resources are characterized by the abundance of historical and cultural resources represented by Samarkand, Bukhara, and Khiva, famous as World Heritage sites. These cities are connected to form the "Golden Route" for tourism. Furthermore, nine cultural and mixed heritage sites, including the Silk Road in Uzbekistan with 18 locations, are registered on the World Heritage Tentative List. It also shows that Uzbekistan has abundant historical and cultural resources. Uzbekistan's unique intangible cultural heritages, including musical instruments, music, and dance, are rich, while utilizing them for tourism is still limited.

**Table 4.4: Cultural resources in Uzbekistan**

World Heritage sites	World Heritage Tentative List	Intangible Cultural Heritage
UZ-A1 Ichan Kala of Hiva (1990) UZ-A2 Bukhara Historic Centre (1993) UZ-A3 Shahri Subhas Historic Centre (2000) UZ-A4 Samarkand - Cultural Crossroads (2001)	UZ-B1 Silk Road Site in Uzbekistan <sup>1</sup> (2010) UZ-B2 Abdulkan Bandidam (2008) UZ-B3 Aquastanababa Mausoleum (1996) UZ-B4 Araboata Mausoleum (2008) UZ-B5 Baisun (1997) UZ-B6 The Fortress Ruins of Horazm (2008) UZ-B7 Hambandi Dam (1996) UZ-B8 Sarmish Sci Rock Art (2008) UZ-B9 Sipantosh Rock Art (2008) UZ-B10 Zarauzoi Rock Art (2008)	UZ-D1 Traditional culture of the Baisun region (2008) UZ-C2 Katta Ashura (Songs and Music of Ferghana Region) (2009) UZ-C3 Askia (wit art) (2014) UZ-C4 Prof Culture and Tradition (2016) UZ-C5 Margilan Silk Fabric - Adras and Atlas (2017) UZ-C6 Horasm Dance Razgi (2019) UZ-C7 Miniature Art (2020)

Source: World Heritage Centre website (<http://whc.unesco.org>); World Heritage Tentative List (<https://whc.unesco.org/en/tentativelists/>); Intangible Cultural Heritage Centre website (<https://ich.unesco.org/en/lists>).

In addition to the historical and cultural resources, one of the most important tourist attractions is the "graveyard of ships" in the Republic of Karakalpakstan. On the border between Uzbekistan and Kazakhstan, the Aral Sea originally had the world's fourth-largest surface area but has been rapidly dried up probably due to a large amount of water used for irrigation for cotton cultivation in the former Soviet Union era. In the past, fisheries were active, but salinity has increased with the decrease in water volume, causing the fish to die. Subsequently, this has resulted in a decline in fisheries. The fishing boats have been left behind in the dry lake bottom, making it a valuable sightseeing spot for understanding environmental issues.

#### 4.2.2. Natural resources

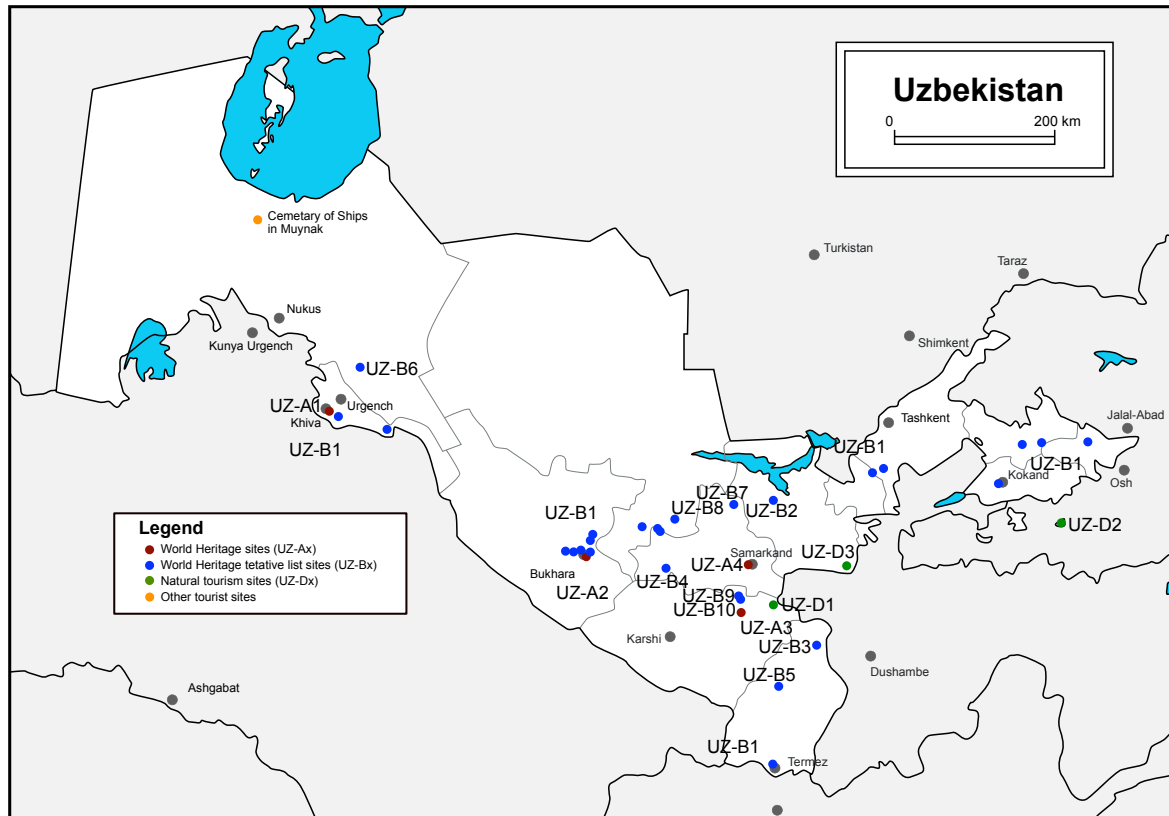
Uzbekistan is rich in cultural assets, but as a natural heritage of World Heritage sites, Western Tien-Shan is registered with Kazakhstan and the Kyrgyz Republic. In addition, the following three natural heritage sites were registered in the World Heritage Tentative List in 2008. It has the potential to utilize them for tourism.

**Table 4.5: Natural resources in Uzbekistan**

Name	Feature
UZ-D1 Guissar Mountains	It is located on the west side of the Pamir-Alay Mountains and the border with Tajikistan. It is composed of the Gissar State Reserve and the Kitob State Reserve and has the Khazret Sultan Mountain, the highest peak in Uzbekistan and a pilgrimage site for Muslims, as well as Tamerlan cave called the Amir Timur Cave. The Kitob Reserve is also a candidate for the UNESCO Global Geopark.
UZ-D2 Shashimardan	It is located on the border with the Kyrgyz Republic and in the northern part Alay Mountains. Some glaciers and highlands lakes have a high potential for tourism as resort sites.
UZ-D3 Zhaoming Mountains	Located on the border with Turkmenistan and consists of the Zaarmin State Reserve and the Zaarmin National Park. There can be found rare flora and fauna registered in the Red Book in Uzbekistan. The areas whose altitude ranges from 1,760 meters to 3,500 meters are designated as reserves.

Source: Prepared by the survey team from the World Heritage Tentative List (<https://whc.unesco.org/en/tentativelists/>)

<sup>1</sup> 18 sites including the Complex of Sheikh Mukhtar-Vali (mausoleum) registered on the World Heritage Tentative List in 1996, the Ancient Termiz, Historic Center of Qoqon, the Oasis city of Kanka, Shahruiya, Ahsiket, Andijon, Poykent, Varakhsha, the Ancient Pap ruins, Vobkent Minaret, Chashma-Ayub Mausoleum, Chor-Bakr, Bahoutdin Complex, Raboti Malik Caravansalai, Mir-Sayid Bakhrom Mausoleum, Sheikh Mukhtar-Vali, Khazarasp, and Qosim Sheikh, all of which were registered on the World Heritage Tentative List in 2008.



Source: Prepared by the survey team from the World Heritage Centre website (<http://whc.unesco.org>); the World Heritage Tentative List (<https://whc.unesco.org/en/tentativelists/>)

**Figure 4.2: Tourism resources in Uzbekistan**

### 4.2.3. Handicraft

Uzbekistan is rich in handicrafts and souvenirs such as embroidery called Suzani and Adras and Atlas silk fabrics that are registered as intangible cultural heritages. In addition, Rishtan pottery, Gijduvan pottery, and scissors of the Bukhara stork are famous for souvenirs.

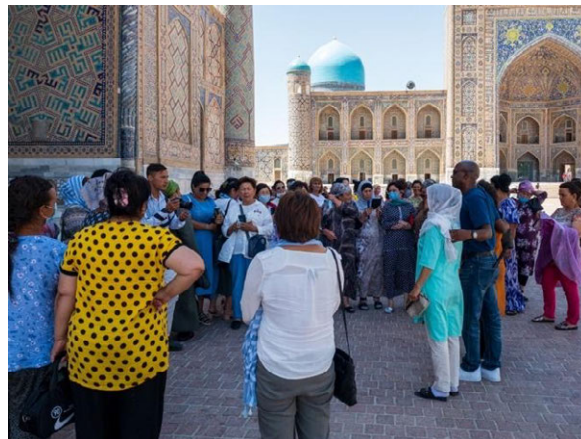
### 4.2.4. Trends in tourism products

Along with the simplification of visa requirements in 2017, the number of tourists showed a rapid increase on the route to Tashkent, Samarkand, Bukhara, and Khiva. During 2018 and 2019, it suffered from the harmful effects of over-tourism. Although the number of tourists declined sharply due to the COVID-19 outbreak, the construction of hotels is proceeding rapidly in order to increase the capacity of receiving tourists in preparation for after COVID-19.

The tourist route which connects Tashkent, Samarkand, Bukhara, and Khiva is called the "Golden Route." This route was developed by the private sector, such as travel agencies and tour operators in Uzbekistan. Tourists from Japan and Europe to Uzbekistan usually follow this route, but the length of stay is different. Japanese stay between five days and eight days. On the other hand, Europeans stay around for two weeks. The travel style is different, observing that Japanese move from one city to

another after one night. In comparison, Europeans spend several nights in a town to enjoy other city attractions such as nature or adventure.

Domestic tourism has been active under the policy to promote domestic tourism introduced in 2019. As shown in section 2.1, 60% of domestic tourism is dominated by youth, women, and business groups. During the survey conducted in June 2021 by this survey team, many domestic tourist groups were observed in Samarkand. Domestic tourists have supported the tourism industry, which suffered from the coronavirus pandemic.



A female group of domestic tourists

#### 4.2.5. Diversification of tourism products

With the relaxation of visa requirements enacted in 2017, historical and cultural tourism, especially along the Golden Route, grew significantly in 2018 and 2019. Public and private sectors in Uzbekistan have started to diversify tourism products by adding value to the tours, which visit cultural and historical heritages in the cities. This diversification has two directions. One is to diversify tourism products by developing new products that utilize other tourism resources rather than historical and cultural ones. The other is to diversify tourism destinations by attracting tourists outside the Golden Route, which has become congested by the sudden increase.

MOTAS has established the "Department of Diversification of Services," which diversifies the tourism product. This department aims to promote diversification of tourism products in various aspects such as MICE, medical tourism, educational tourism (accepting international students), ecotourism, cultural tourism, geological tourism, sports tourism, cycling, religious and pilgrimage tourism, and agro & ethno tourism<sup>2</sup>. The government plans to implement 96 projects in the next five years, including improving roads and electricity.

Meanwhile, travel companies are also promoting diversification. For example, one travel company constructed Yurt camp at Aydar Lake, located on the way from Samarkand to Bukhara, and provides a

<sup>2</sup> <https://uzbekistan.travel/en/i/types-of-tourism/>

tour that includes visiting Samarkand and Bukhara and staying at the Yurt camp and enjoying horse riding and/or lake bathing. The company developed this new tour was derived from the demand from European tourists. They requested the time to relax and enjoy nature between visiting historical cities such as Samarkand and Bukhara. Another company provides an experimental tour that visits Fergana valley and experiences pottery-making and/or painting on the potteries. There is another company that tries to develop wine tourism utilizing the winery in the suburb of Tashkent.



Yurt camp and activities at Aydar Lake  
(Sheherazade Sam Star Tour)

### 4.3. Kyrgyz Republic

#### 4.3.1. Cultural resources

In the Kyrgyz Republic, the utilization of cultural heritage for tourism is still limited. Still, it has several sites registered as the World Heritage sites such as "Burana Tower and Balasagun site" and "Ak-Besim site" within "Silk Roads: the Routes Network of Chang'an-Tianshan Corridor" that straddles Kazakhstan and Kyrgyz. "Sulaiman-Too Sacred Mountain," a pilgrimage site of Islam located near Osh, which flourished as an oasis city, is also registered as a World Heritage site. The Tash-Rabat, one of the Silk Road sites on the World Heritage Tentative List, and the Cholpon-Ata Petroglyphs Museum are expected to be utilized for tourism in the future.

The Kyrgyz Republic and Kazakhstan share a nomadic culture. Felts are indispensable materials for migratory dwellings such as yurts and nomads. Carpets and traditional hats using felts, registered as Intangible Cultural Heritage, can be good souvenirs.

**Table 4.6: Cultural resources in the Kyrgyz Republic**

World Heritage sites	World Heritage Tentative List	Intangible Cultural Heritage
KG-A1 Silk Roads: the Routes Network of Chang'an-Tianshan Corridor (Kazakhstan, Kyrgyz) (2014) KG-A2 Sulaiman-Too Sacred Mountain (2009)	KG-B1 Silk Roads Sites in Kyrgyzstan (6 sites) (2010) KG-B2 Saimaly-Tash Petroglyphs (2001)	KG-C1 Art of Akyns, Kyrgyz epic tellers (2008) KG-C2 Ala-kiyiz and Shyrdak, art of Kyrgyz traditional felt carpets (2012) KG-C3 Kyrgyz epic trilogy: Manas, Semeley, Seytek (2013) KG-C4 Kok boru, traditional horse game (2017) KG-C5 Ak-kalpak craftsmanship,



World Heritage sites	World Heritage Tentative List	Intangible Cultural Heritage
		traditional knowledge and skills in making and wearing Kyrgyz men's headwear (2019)

Source: World Heritage Centre website (<http://whc.unesco.org>); World Heritage Tentative List (<https://whc.unesco.org/en/tentativelists/>); Intangible Cultural Heritage Centre website (<https://ich.unesco.org/en/lists>).

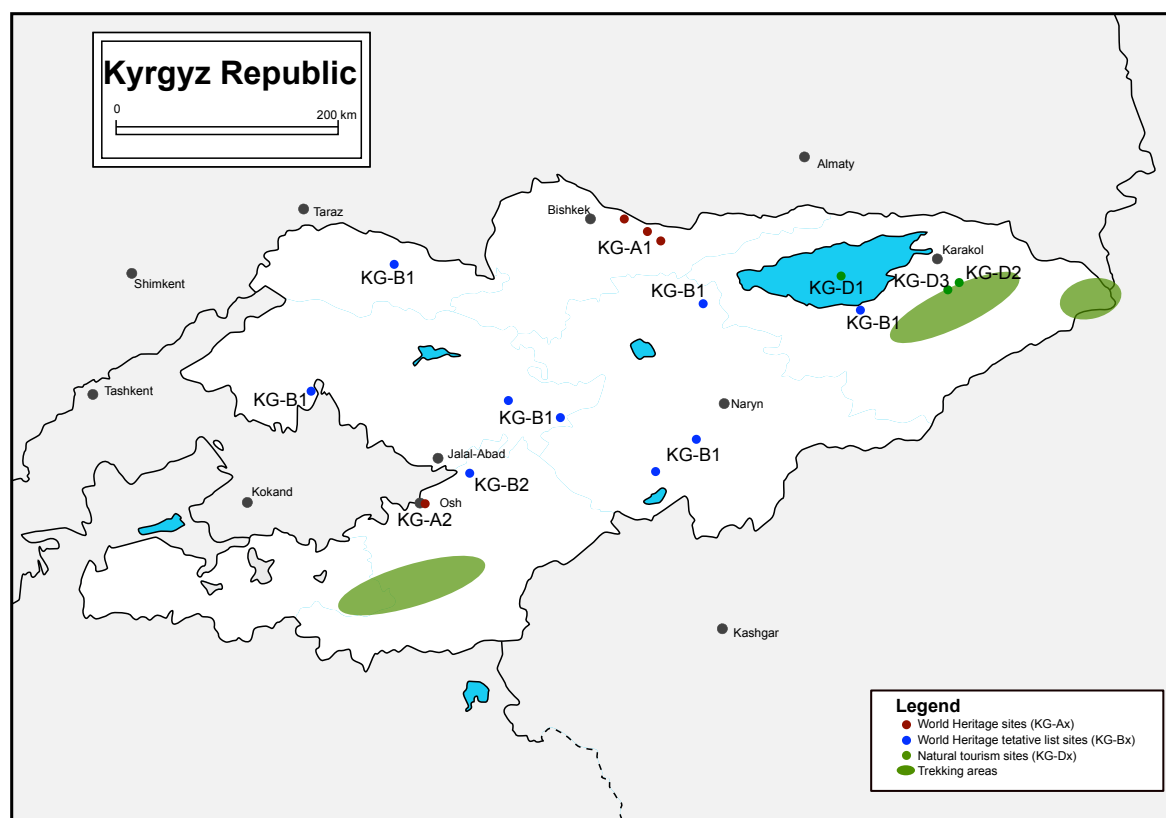
### 4.3.2. Natural resources

The Kyrgyz Republic, a mountainous country, is blessed with abundant natural resources. It has hot spring resorts and beautiful highland lakes popular for trekking and hiking, including Issyk-Kul Lake (registered in 2001 as a UNESCO Biosphere Reserve), the most prominent tourist spot.

**Table 4.7: Natural resources in the Kyrgyz Republic**

Name	Features
KG-D1 Issyk-Kul Lake	Issyk-Kul Lake is a famous summer resort in the Kyrgyz Republic. It is a mountain lake about nine times larger than Lake Biwa (largest lake in Japan), about 760km in circumference, about 180km in east and west, about 60km in maximum width, about 6200 km <sup>2</sup> in area, about 670m in full depth, about 1,600 m in altitude, and more than 20m in transparency. The name comes from the Kyrgyz Issyk (hot) Kul (lake) and does not freeze in the severe winter of Kyrgyz, even if it gets less than minus 20 degrees centigrade, because it contains salt. Long ago, it was also described as 'hot sea' in 'Great Tang Records on the Western Regions', a book written by Xuanzang. During the Soviet era, the entry of foreigners was prohibited, and it was a lake of illusion. It is said that ruins of settlements are under the lake, and there have been many legends since ancient times.
KG-D2 Altyn Arashan	Altyn Arashan is a hot spring resort located along the valley of the Arashan River at an altitude of approximately 3,000 meters. Altyn means gold in Kyrgyz. Mount Palatka (called Tent Peak), with a height of 4,260 meters, is raised in front, and it becomes a grazing land due to abundant grasses in summer.
KG-D3 Lake Alakol	Lake Alakol is a highland lake located at an altitude of 3,500 meters, after Alakol pass, 3,800m. A lake made of snow water dissolved from mountains near the 4,000-meter class where millennial snow remains. After crossing the pass, a sparkling lake spreads over the emerald green.

Source: Prepared by the survey team from UNESCO Biosphere Reserve (<https://en.unesco.org/biosphere/>) and "Globe-Trotter Central Asia: Samarkand and the Countries of the Silk Road."



Source: Prepared by the survey team from the World Heritage Centre website (<http://whc.unesco.org>); the World Heritage Tentative List (<https://whc.unesco.org/en/tentativelists/>)

**Figure 4.3: Tourism resources in the Kyrgyz Republic**

### 4.3.3. Trends in tourism products

Cholpon Ata, located at the north shore of Issyk-Kul Lake, is a famous summer resort. It is crowded by lake water bathers visiting from various parts of Central Asia and Russia during the summer season. The potential for health tourism and wellness tourism, such as spa resorts, is also high.

From Karakol on the east side of Issyk-Kul Lake, people can enjoy climbing, trekking, and hiking to Lake Altyn Arashan and Lake Alakol with the beautiful scenery of the 4000 meter-class mountains and alpine plants in summer. In winter, people can enjoy skiing and snowboarding at Karakol Sky Resort. In addition, special interest tours, such as cycling, jeep and bike tours, rafting, and kayaking, are available<sup>3</sup>.

Yurta camps are being developed around Bokonbayevo village on the south side of Issyk-Kul Lake, and the annual falconry and horse-riding game festival held in August is becoming famous. It has become a tourist center and pioneer in ecotourism and community-based tourism.

As part of USAID's Business Growth Initiative (BGI) project that was implemented between August 2014 and June 2018, it supported enhancing summer tourism, such as developing trekking routes. After

<sup>3</sup> <http://www.discoverkyrgyzstan.org/things-to-do>

this project, the EU has been working on developing sustainable winter tourism products in Kyrgyz from April 2019 to March 2029. HELVETAS, a Swiss aid organization, has implemented this project.

Recently, Song Kol Lake in Naryn Region has been paid attention as a new tourism destination. Yurt camps have been constructed, and tourists can enjoy the scenery of lakes and marshes in the highland and horse riding.



Highlands of Song Kol Lake and a Yulta camp

Mountain climbing is one of the pillars of tourism in Kyrgyz. The revenue source of mountain climbing is to attack three 7000 meter-class mountains (Pobeda, Khan Tengri, Lenin Peak). Since these mountains are popular among mountain climbers, it is unnecessary to conduct any promotion. Kyrgyz also provides mountain climbing schools that target beginners to advanced climbers.

Until 2004, whenever trekking was conducted, porters accompanied trekkers to assemble and disassemble camps in one base and repeat the same in other ones. However, after 2004, the basecamp was constructed during the trekking season, like in Nepal. The main trekking areas (refer to Figure 4.3) are three places, Khan Tengri area (white trekking), Karakol area (green trekking), and Batken area (great trekking).

#### **4.4. Kazakhstan**

##### **4.4.1. Cultural resources**

The World Heritage Site "Khoja Ahmed Yasawi," located in Turkistan in southern Kazakhstan, is famous as a pilgrimage site for Muslims in Central Asia. In addition, "Petroglyphs of the Archaeological Landscape of Tanbalya" contains numerous rock paintings drawn from the Bronze Age to the Iron Age. It is located about 180 kilometers northwest of Almaty, the former capital, and it is possible to conduct an excursion from Almaty. Many rock painting-drawn sites (Petroglyph) are also registered in the World Heritage Tentative List.

**Table 4.8: Cultural resources in Kazakhstan**

World Heritage sites	World Heritage Tentative List	Intangible Cultural Heritage
KZ-A1 Silk Roads: the Routes Network of Chang'an-Tianshan Corridor (Kazakhstan, Kyrgyz) (2014) KZ-A2 Mausoleum of Khoja Ahmed Yasawi (2003) KZ-A3 Petroglyphs of the Archaeological Landscape of Tanbaly (2004)	KZ-B1 Archaeological sites of Otrar oasis (1998) KZ-B2 Barrows with stone ranges of the Tasmola culture (1998) KA-B3 Cultural landscape of Ulytau (1998) KZ-B4 Megalithic mausolea of the Begazy-Dandybai culture (1998) KZ-B5 Paleolithic sites and geomorphology of Karatau mountain range (1998) KZ-B6 Petroglyph Site of Sauyskandyk (XVIII BC – III AD) (2016) KZ-B7 Petroglyphs of Arpa-Uzen (1998) KZ-B8 Petroglyphs of Eshkiolmes (1998) KZ-B9 Silk Road (31 sites) (2012) KZ-B10 Turkic sanctuary of Merke (1998)	KZ-C1 Kazakh traditional art of Dombra Kuy (2014) KZ-C2 Kuresi in Kazakhstan (2016) KZ-C3 Falconry, a living human heritage (Other 17 countries) (2016) KZ-C4 Kazakh traditional Assyk games (2017) KZ-C5 Traditional spring festive rites of the Kazakh horse breeders (2018) KZ-C6 Heritage of Dede Qorqud/Korkyt Ata/Dede Korkut, epic culture, folk tales and music (Azerbaijan, Kazakhstan, Turkey) (2018)

Source: World Heritage Centre website (<http://whc.unesco.org>); World Heritage Tentative List (<https://whc.unesco.org/en/tentativelists/>); Intangible Cultural Heritage Centre website (<https://ich.unesco.org/en/lists>).

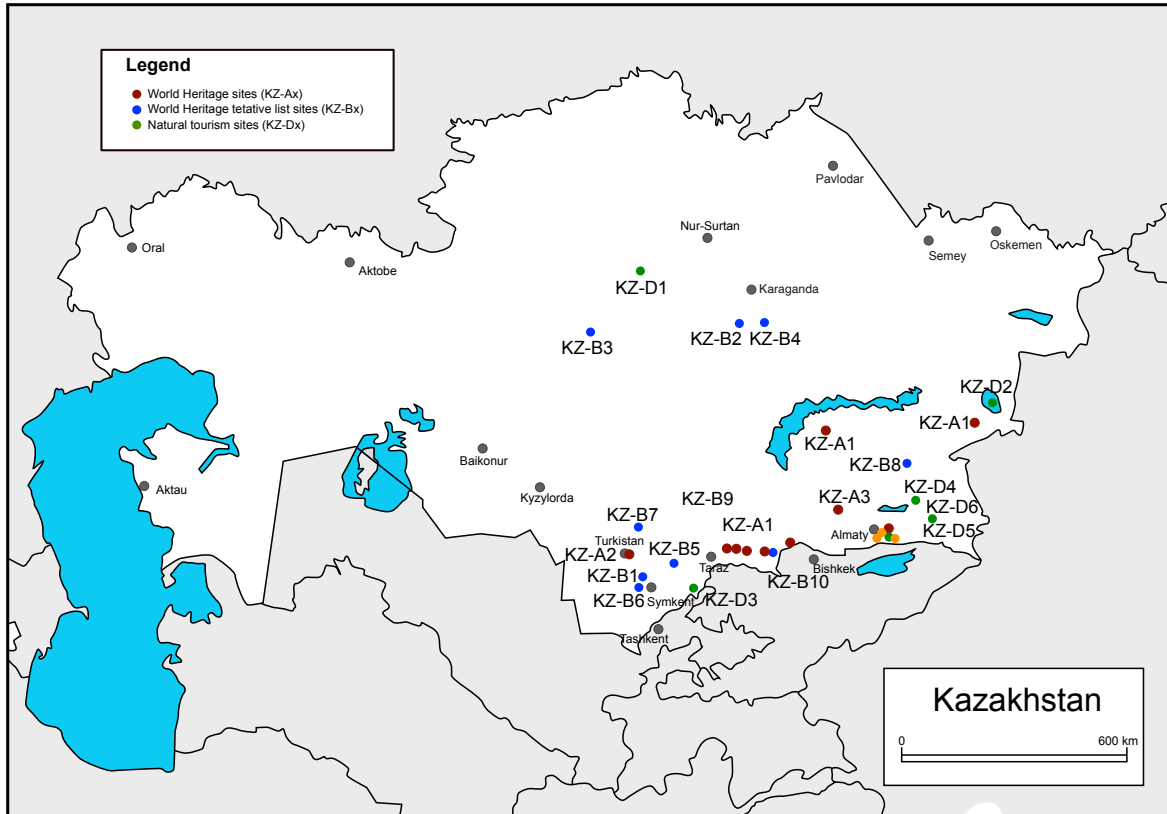
#### 4.4.2. Natural resources

Natural resources are also abundant since 12 areas have been registered as UNESCO Biosphere Reserve, and 13 national parks have been designated in Kazakhstan. Relevant nature reserves and national parks are shown in Table 4.9

**Table 4.9: Natural resources in Kazakhstan**

Name	Features
KZ-D1 Saryarka – Steppe and Lakes of Northern Kazakhstan (World Heritage Site/2008)	Saryarka, which means "Yellow Mountains," is a part of the Kazakh highlands located about 250km west of Karaganda City. Saryarka Consists of the Naurzum State Nature Reserve and the Korgalzhyn State Nature Reserve have wetlands that are essential stop-over points for migratory birds from Europe, Africa, South Asia, and elsewhere.
KZ-D2 Alakol Biosphere Reserve (UNESCO Biosphere Conservation Area)	The reserves have large lakes such as Alakol, Sasykkol, Koshkarkol, and Zhalanashkol. It is located on a migratory bird route from Central Asia to India. The wetlands are of global importance as a habitat and nesting place for water birds.
KZ-D3 Aksu-Zhabagly State Natural Reserve	It is a nature reserve located in the Western Tien-Shan, a WHS straddling Kazakhstan, Kyrgyz, and Uzbekistan. It is also on the World Heritage Tentative List and a famous reservoir for native wild animals and alpine plants. The reserve is an Important Bird and Biodiversity Areas (IBAs) designated by BirdLife International.
KZ-D4 State National Natural Park "Altyn-Emel"	It is a national park approved to protect rare flora and fauna in 1996 and registered in the World Heritage Tentative List. It is located about 150km northeast of Almaty. Fifty-six of the animals and forty birds in the park are endangered species. It is also an IBA designated by BirdLife International.
KZ-D5 Ile-Alatau State National Park	It is part of Northern Tyan Shan and easily accessible from Almaty. It was certified as a national park in 1996 to conserve its nature and utilize it for recreational activities within the park (World Heritage Tentative List). The park is home to the Big Almaty Lake, 2,500 meters above sea level.
KZ-D6 Charyn National Park	It is approximately 200km east of Almaty and has a Charyn Canyon called the Mini Grand Canyon of Kazakhstan in the national park. In the summer, people can enjoy camping along the Charyn River.

Source: World Heritage Centre website (<http://whc.unesco.org>); World Heritage Tentative List (<https://whc.unesco.org/en/tentativelists/>); UNESCO Biosphere Reserve (<https://en.unesco.org/biosphere/>); "Globe-Trotter Central Asia: Samarkand and the Countries of the Silk Road."



Source: Prepared by the survey team from the World Heritage Centre website (<http://whc.unesco.org>); the World Heritage Tentative List (<https://whc.unesco.org/en/tentativelists/>)

**Figure 4.4: Tourism resources in Kazakhstan**

#### 4.4.3. Trends in tourism products

In the suburbs of Almaty, winter sports are popular, and there are Medeu Skating Rink, located at the highest sea level in the world, and Shymbulak Ski Resort. Ile-Alatau National Natural Park has the Big Almaty Lake, making it a resort area where people can enjoy the lakes and mountain scenery around Almaty. In addition, people can enjoy trekking and hiking with the magnificent natural landscape during the summer in Altyn-Emel National Park, Charyn National Park, among other attractions.

In contrast to the abundant nature, Nur-Sultan (formerly Astana), which became the capital in 1997, was designed by the late Kisho KUROKAWA, a Japanese architect. Various buildings with near-futuristic designs represented by Baiterek Tower were constructed one after another and are called future cities. In the south-central part of Kazakhstan, Baikonur Cosmodrome is located. It is possible to observe the arrival and departure of rockets, which provide a different type of tourism product than Uzbekistan and the Kyrgyz Republic.

### 4.5. Turkmenistan

#### 4.5.1. Cultural resources

The "Ancient Merv," the oasis city of the Silk Road, the "Nisa Fortresses," the urban remains originating

in the Parthian Empire, and the "Kunya-Urgench," flourished in the 12<sup>th</sup> century as the capital of the Khwarazm, are registered as World Heritage sites and pass down the history of trading merchants to the present.

**Table 4.10: Cultural resources in Turkmenistan**

World Heritage sites	World Heritage Tentative List	Intangible Cultural Heritage
TR-A1 State Historical and Cultural Park "Ancient Merv" (1999) TR-A2 Kunya-Urgench (2005) TR-A3 Parthian Fortresses of Nisa (2007)	TR-B1 Dehistan / Mishrian (1998) TR-B2 Silk Road Site in Turkmenistan (30 sites) (2010)	TR-C1 Epic art of Gorogly (2015) TR-C2 Kushtdepdi rite of singing and dancing (2017) TR-C3 Traditional turkmen carpet making art in Turkmenistan (2019)

Source: World Heritage Centre website (<http://whc.unesco.org>); World Heritage Tentative List (<https://whc.unesco.org/en/tentativelists/>); Intangible Cultural Heritage Centre website (<https://ich.unesco.org/en/lists>).

#### 4.5.2. Natural resources

Nine nature reserves in Turkmenistan and six sites in Table 4.11 were registered on the World Heritage Tentative List in 2009.

**Table 4.11: Natural resources in Turkmenistan**

Name	Features
TR-D1 Amudarya State Nature Reserve	A nature reserve was established in 1982 to protect the part of the Amudarya River
TR-D2 Badkhyz State Nature Reserve	A nature reserve was established in 1941 to protect the ecosystem of the Badkhyz Highlands. An Important Birds Area (IBA) is designated by Birds Life International <sup>4</sup> .
TR-D3 Dinosaurs and Caves of Koytendag	Koytendag Nature Reserve was established in 1986, and the area includes four sanctuaries. It is also an IBA designated by Birds Life International <sup>5</sup> .
TR-D4 Hazar State Nature Reserve	A protected area on the southeast coast of the Caspian Sea, established in 1932
TR-D5 Repetek Biosphere State Reserve	This protected area was established in 1927, about an hour from Turkmenabat. It was established to protect the ecosystem of the Karakum Desert. It is also designated as an IBA by Birds Life International <sup>6</sup> .
TR-D6 Syunt Hasardag State Nature Reserve	It was established in 1977 to protect the flora and fauna endemic species to Turkmenistan.

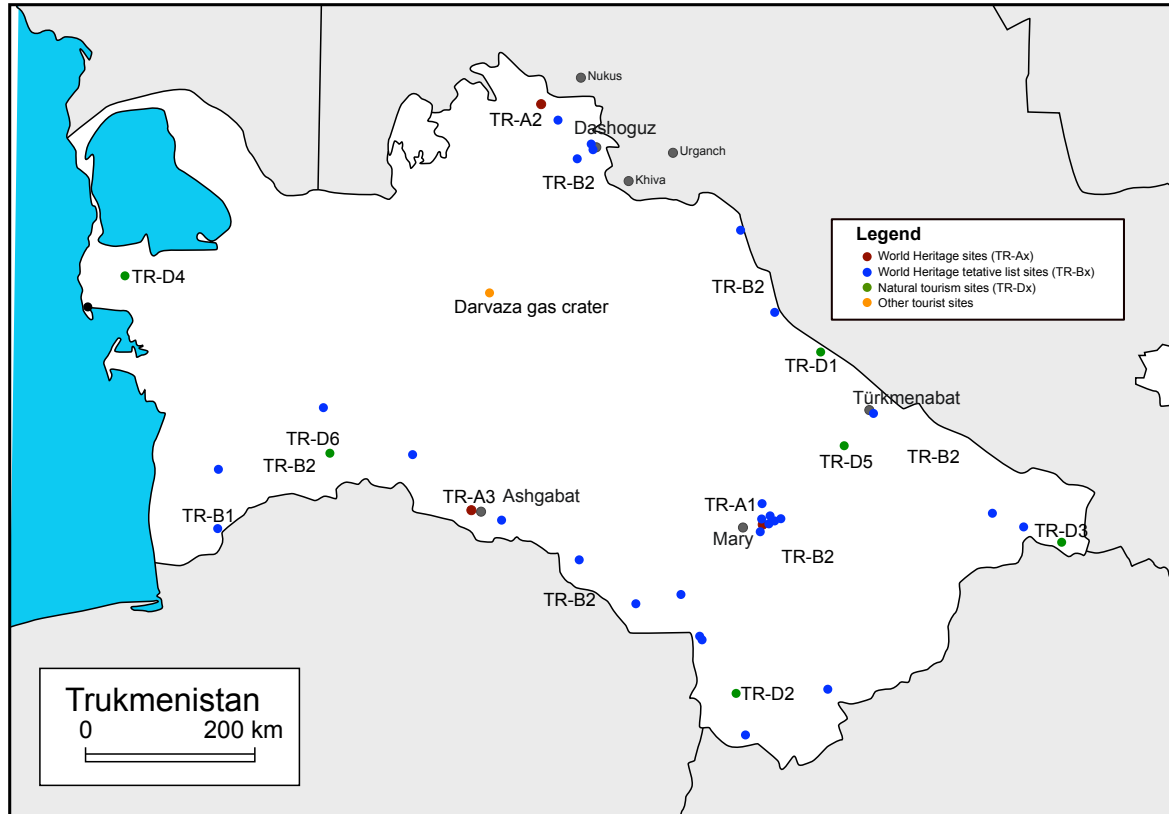
Source: Prepared by the survey team from the World Heritage Tentative List (<https://whc.unesco.org/en/tentativelists/>)

The number of tourists from Uzbekistan who visit the "Gate of Hell," a natural gas field that fell through a cave, has been increasing despite the lack of tourist facilities. The tour for one night and two days from Uzbekistan is getting popular. It is located in the Karakum Desert, about 260 kilometers north of the capital city of Ashgabat.

<sup>4</sup> <http://datazone.birdlife.org/site/factsheet/badkhyz-iba-turkmenistan>

<sup>5</sup> <http://datazone.birdlife.org/site/factsheet/koytendag-iba-turkmenistan>

<sup>6</sup> <http://datazone.birdlife.org/site/factsheet/repetek-iba-turkmenistan>



Source: Prepared by the survey team from the World Heritage Centre website (<http://whc.unesco.org>); the World Heritage Tentative List (<https://whc.unesco.org/en/tentativelists/>)

**Figure 4.5: Tourism resources in Turkmenistan**

### 4.5.3. Trends in tourism products

Turkmenistan is the most challenging country in Central Asia to obtain a visa, and it is necessary to apply for a visa from authorized travel agencies for a guided tour. Recently, the number of tourists who visit the Gate of Hell from Uzbekistan has been increasing. It is possible to create tourist products accessible from Uzbekistan, which also shares trade bases such as Konye-Urgench, the capital of Khwarazm.

In addition, Turkmenistan has established an Avaza National Tourist Zone along the Caspian Sea. It is also developing luxury integrated resorts, including access to a new airport in Turkmenbashi.

## 4.6. Tajikistan

### 4.6.1. Cultural resources

"The Ancient city of Sarazm," constructed between 4000 and 3000 BC, is registered as a World Heritage site. It is one of the oldest residential sites in Central Asia. The World Heritage Tentative List contains Buddhist sites, ancient cities, and many mausoleums, giving a glimpse of the country's ancient history.

Panjakent in the western part of Tajikistan is where the ancient Sogdiana State was located along with Samarkand and Bukhara Regions in Uzbekistan. It has the old urban site of the Sogdia people, Ancient

Panjakent. It shares its culture with Uzbekistan, such as palov and embroideries registered as Intangible Cultural Heritages.

**Table 4.12: Cultural resources in Tajikistan**

World Heritage sites	World Heritage Tentative List	Intangible Cultural Heritage
TJ-A1 Proto-urban Site of Sarazm (2010)	TJ-B1 Buddhistic cloister of Ajina-Tepa (1999) TJ-B2 Fann mountains (2006) TJ-B3 Khulbuk – the capital of ancient Khuttal (2021) TJ-B4 Mausoleum of "Amir Khamza Khasti Podshoh" (1999) TJ-B5 Mausoleum of "Hodja Nashron" (1999) TJ-B6 Mausoleum of "Khoja Mashkhad" (1999) TJ-B7 Mausoleum of "Mukhammad Bashoro" (1999) TJ-B8 Silk Road Site in Tajikistan (8 sites) (2013) TJ-B9 The Site of Ancient Town of Baitudasht IV (1999) TJ-B10 The Site of Ancient Town of Pyanjekent (1999) TJ- B11 The Site of Ancient Town of Shahrstan (Kahkakha) (1999) TJ-B12 The Site of Ancient Town of Takhti-Sangin (1999)	TJ-C1 Oshi Palav, a traditional meal and its social and cultural contexts in Tajikistan (2016) TJ-C2 Chakan, embroidery art in the Republic of Tajikistan (2018)

Source: World Heritage Centre website (<http://whc.unesco.org>); World Heritage Tentative List (<https://whc.unesco.org/en/tentativelists/>); Intangible Cultural Heritage Centre website (<https://ich.unesco.org/en/lists>).

#### 4.6.2. Natural resources

Tajikistan's largest nature reserve, "Tajik National Park (Mountains of the Pamirs)," is registered as a World Heritage site, and four reserves are on the World Heritage Tentative List. Three of these four reserves have precious flora and fauna, such as the Important Birds Areas (IBAs) by BirdLife International.

**Table 4.13: Natural resources in Tajikistan**

name	feature
TJ-D1 Tajik National Park (Mountains of the Pamirs) (World Heritage Site /2013)	The largest nature reserve in Tajikistan, accounting for nearly 20 percent of Tajikistan's land. The mountains of the 7000m class of the Pamirs, which follows the Himalayan Karakorum, are connected. The park has a variety of landscapes ranging from deserts, highlands, and highland lakes to the most significant glacial zone in the Eurasian continent.
TJ-D2 State reserve Dashti Djum (2006)	Of the 213 species representing this state reserve, 139 species are designated as an IBA by BirdLife International. Six species have been registered in IUCN Red List <sup>7</sup> .
TJ-D3 Tigrovaya Balka (2006)	More than 160 species have been identified, of which 17 are registered in the Red List in Tajikistan. It is one of the IBAs by BirdLife International <sup>8</sup> .
TJ-D4 Zakaznik Kusavlisay (2006)	It was established to protect Juniper vegetating in the Turkistan Mountains, located 2700 to 3000 meters above sea level.
TJ-D5 Zorkul State Reserve (2006)	A reserve is established to protect Bar-headed goose. It is one of the IBAs by BirdLife International <sup>9</sup> .

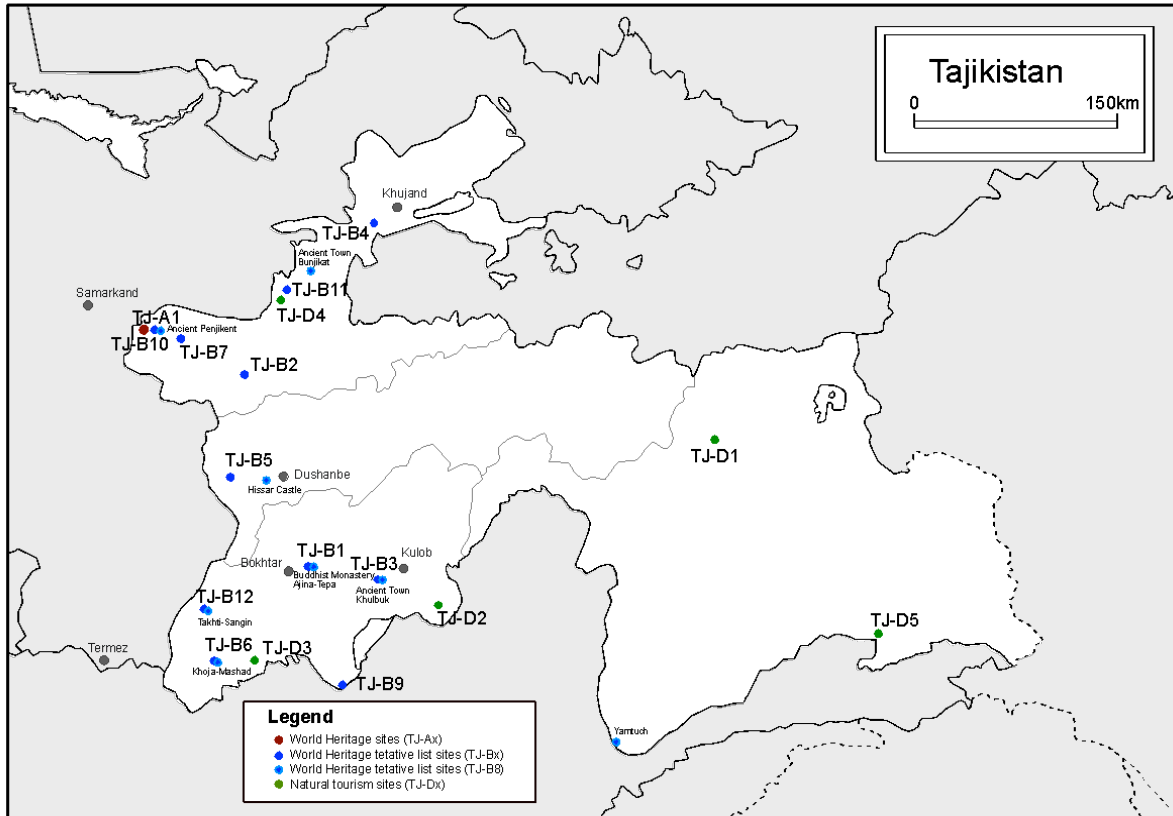
Source: Prepared by the survey team from the World Heritage Centre website (<http://whc.unesco.org>); the World Heritage Tentative List (<https://whc.unesco.org/en/tentativelists/>)

<sup>7</sup> <http://datazone.birdlife.org/site/factsheet/dashtidjum-iba-tajikistan>

<sup>8</sup> <http://datazone.birdlife.org/site/factsheet/tigrovaya-balka-nature-reserve-iba-tajikistan>

<sup>9</sup> [http://datazone.birdlife.org/site/factsheet/zorkul-nature-reserve-\(lake-victoria\)-iba-tajikistan](http://datazone.birdlife.org/site/factsheet/zorkul-nature-reserve-(lake-victoria)-iba-tajikistan)





Source: Prepared by the survey team from the World Heritage Centre website (<http://whc.unesco.org>); the World Heritage Tentative List (<https://whc.unesco.org/en/tentativelists/>)

**Figure 4.6: Tajikistan's tourism resources**

### 4.6.3. Trends in tourism products

The western part of Tajikistan shares Sarazm and Sogdia culture with the neighboring country Uzbekistan. A day trip from Tashkent to Khujand, known as the oldest city and the capital of Sughd Province, Tajikistan, is available. Tours to visit Samarkand, Uzbekistan, Panjakent and Sarazm ruins, Tajikistan, are also provided.

People can enjoy the magnificent view of the Pamir Plateau in the eastern part of Tajikistan. The tour to travel both Kyrgyz and Tajikistan, which have similar mountainous scenery, is also available, although it is necessary to pay careful attention to the security situations.



## 5. Tourism facilities

This chapter describes the status of tourism facilities (accommodation and other recreational facilities), focusing on the quantitative analysis of tourism facilities in UNWTO and national tourism statistics and describing accommodation services in Uzbekistan and the Kyrgyz Republic, which were identified through site visits and interviews.

### 5.1. Uzbekistan

#### 5.1.1. Statistics on tourism facilities

Table 5.1 and Table 5.2 are the statistics in UNWTO's Compendium of Tourism Statistics", 2020 and 2021 editions. Table 5.1 number of accommodation facilities and hotel rooms in Uzbekistan. In 2019, the number of hotels was about 1,200, and the number of hotel rooms was about 22,000. After 2014, the number of hotels and hotel rooms has increased at an annual rate of 16% and 5%, respectively. It seems that the number of hotels with fewer rooms and smaller hotels is increasing.

**Table 5.1: Number of accommodations and hotel rooms in Uzbekistan (UNWTO)**

Items	2014	2015	2016	2017	2018	2019
Accommodation for visitors (units)		...	...	...	1,503	1,793
Number of "hotels and similar establishments" (units)	568	615	701	767	914	1,188
Number of rooms (rooms)	17131	17,779	19,167	19,977	20,947	21,758

Source: Compendium of Tourism Statistics, 2020 and 2021 editions

Table 5.2 shows that the number of international tourist guests and guest nights in 2019 was 1.17 million and 2.52 million, increasing at an annual rate of 20 percent and 18 percent, respectively, from 2014. In the same year, the number of domestic tourist guests and guest nights was 1.95 million and 9.46 million, increasing at annual rates of 19% and 7%, respectively.

**Table 5.2: Accommodation guests and guest nights in Uzbekistan (UNWTO)**

Items	2014	2015	2016	2017	2018	2019
Inbound						
Guests (000 persons)	464	423	499	616	963	1,172
Overnights (000 person-nights)	1086	1,047	1,280	1,391	2,460	2,525
Domestic						
Guests (000 persons)	808	901	1,014	1,098	1,193	1,948
Overnights (000 person-nights)	2425	2,278	2,608	2,790	2,681	3,460

Source: Compendium of Tourism Statistics, 2020 and 2021 editions

Table 5.3 onwards shows the figures recorded in Uzbekistan Tourism 2019 by the Statistical Office of Uzbekistan. Table 5.3 shows the number of accommodation facilities, estimated to be 1,785 in 2019, including 1,051 hotels and other facilities, 211 sanatoriums and other spa facilities, and 523 other recreational organizations and tourist centers. While the number of spa facilities has hardly increased, hotels have increased by 12% per year. The number of other recreational organizations and tourist centers has increased by 28% per year. Recreational organizations and tourist centers seem to include

Yurta camps, increasing in recent years. The number of tourist facilities in Table 5.3 is slightly higher than the UNWTO statistics in Table 5.1, and the classification of accommodation facilities is more detailed.

**Table 5.3: Number of tourist facilities in Uzbekistan**

Unit: Unit

Kind of accommodations	2016	2017	2018	2019
Number of accommodation facilities	1,184	1,307	1,503	1,785
Hotels and similar accommodation facilities	750	816	916	1,051
Spa facilities	183	193	211	211
Recreation organizations and tourist centers	251	298	376	523

Source: Uzbekistan Tourism 2019, State Committee of the Republic of Uzbekistan on Statistics, 2020

Table 5.4 shows the distribution of hotels and similar accommodation facilities by regions and an autonomous republic since 2016. In 2019, Tashkent City, Bukhara Region, and Samarkand Region accounted for 21%, 16%, and 14%, respectively. The average annual increase from 2016 shows that Fergana Region (31%) and Tashkent Region (23%) are higher.

**Table 5.4: Number of hotels and similar accommodation facilities by regions and an autonomous republic**

Region/autonomous republic	2016	2017	2018	2019
Uzbekistan	750	816	916	1,051
Republic of Karakalpakstan	44	47	52	28
Andijan	32	25	23	22
Bukhara	104	125	140	173
Djizak	34	34	45	40
Kashkadarya	44	43	43	62
Navoi	26	30	29	35
Namangan	24	26	26	27
Samarkand	112	110	116	146
Surkhandarya	35	38	38	26
Syrdarya	11	12	17	15
Tashkent	52	67	78	96
Fergana	41	49	55	92
Khorezm	46	53	64	73
Tashkent City	145	157	190	216

Source: Uzbekistan Tourism 2019, State Committee of the Republic of Uzbekistan on Statistics, 2020

**Table 5.5: Number of guests in hotels and similar accommodation facilities by regions and autonomous republic**

Unit: 000 persons

Region/autonomous republic	2016	2017	2018	2019
Uzbekistan	1,513.1	1,714.2	2,125.9	2,193.4
Republic of Karakalpakstan	38.3	38.7	43.9	43.7
Andijan	39.7	39.2	57.3	53.4
Bukhara	118.5	144.0	190.2	220.6
Djizak	51.8	34.8	35.5	39.0
Kashkadarya	76.8	79.2	81.7	83.8
Navoi	61.7	643.0	53.1	53.1
Namangan	51.0	59.4	55.9	56.3
Samarkand	154.5	176.4	231.2	268.4
Surkhandarya	54.1	554.0	77.4	30.6
Syrdarya	8.3	19.0	4.8	19.8
Tashkent	100.2	102.9	91.2	107.5
Fergana	47.2	59.9	73.3	72.1
Khorezm	72.0	87.5	118.9	154.6
Tashkent City	639.0	763.4	1,001.5	990.5

Source: Uzbekistan Tourism 2019, State Committee of the Republic of Uzbekistan on Statistics, 2020

Table 5.5 shows the number of guests in the hotel and similar accommodation facilities by region and an autonomous republic from 2016 to 2019. Over the period, the number of guests in Uzbekistan increased at an annual rate of 13%. Shirdarya Region (34%), Khorezm Region (29%), Bukhara Region (23%), and Samarkand Region (20%) recorded the highest growth rates. In terms of share over the same period, Tashkent City consistently accounted for nearly half of the total.

Table 5.6 shows the breakdown of hotels and other facilities, the number of rooms and guests by region, and an autonomous republic in 2019. The distribution of the number of rooms in hotels and similar accommodations tends to be more concentrated in Tashkent City than in the number of facilities, with a share of 21% in the number of facilities but a share of 34% in the number of rooms.

**Table 5.6: Number of hotel units, rooms, and guests by regions and autonomous republic (2019)**

Unit: persons

Region/autonomous republic	Hotels and similar accommodation facilities		Number of guests in hotels and similar accommodation facilities			
	Number of facilities	Number of rooms	Total	From Uzbekistan	From CIS	From other countries
Uzbekistan	1,051	46,671	2,193,394	1,099,163	306,482	787,749
Republic of Karakalpakstan	28	1,076	43,749	28,505	2,811	12,433
Andijan	22	958	53,393	41,454	5,967	5,972
Bukhara	173	5,093	220,580	65,568	30,196	124,816
Djizak	40	1,214	38,990	35,630	1,685	1,675
Kashkadarya	62	2,231	83,759	74,271	4,423	5,065
Navoi	35	1,639	53,085	42,489	4,546	6,050
Namangan	27	1,696	56,296	44,330	5,128	6,838
Samarkand	146	5,800	268,367	85,819	41,898	140,650
Surkhandarya	26	850	30,570	17,542	1,876	11,152
Syrdarya	15	378	19,813	17,516	1,365	932
Tashkent	96	3,899	107,470	85,674	13,923	7,873
Ferghana	92	2,917	72,118	47,714	4,951	19,453
Khorezm	73	3,092	154,653	67,832	9,660	77,161
Tashkent City	216	15,828	990,551	444,819	178,053	367,679

Source: Uzbekistan Tourism 2019, State Committee of the Republic of Uzbekistan on Statistics, 2020

**Table 5.7: Number of guest-nights in hotels and similar accommodation by regions and autonomous republic**

Unit: 000 person-nights

Region/autonomous republic	2016	2017	2018	2019
Uzbekistan	3,887.8	4,181.8	4,693.9	4,838.9
Republic of Karakalpakstan	304.7	494.1	76.6	76.7
Andijan	87.8	78.7	115.3	101.3
Bukhara	233.9	279.1	384.0	409.0
Djizak	104.6	96.1	91.6	70.6
Kashkadarya	213.8	131.5	158.1	164.9
Navoi	120.0	133.9	162.6	127.6
Namangan	99.1	106.8	99.2	91.4
Samarkand	345.9	384.6	469.0	544.1
Surkhandarya	174.6	148.8	200.0	63.3
Syrdarya	20.6	21.2	31.9	50.0
Tashkent	279.7	242.8	293.1	348.5
Ferghana	100.8	124.9	162.4	198.6
Khorezm	142.8	157.1	191.4	236.7
Tashkent City	1,659.5	1,782.2	2,258.7	2,356.2

Source: Uzbekistan Tourism 2019, State Committee of the Republic of Uzbekistan on Statistics, 2020

The number of guests is concentrated in Tashkent City (45%), Samarkand Region (12%), and Bukhara Region (10%). While the number of Uzbek guests is dispersed in other regions, the number of international tourists from CIS and non-CIS is more concentrated in the above three cities and regions than the number of Uzbeks. In addition, the number of international tourists from the CIS is characterized by many guests from Tashkent Region (13,000 persons; 5%), while the number of international tourists from outside the CIS is characterized by a large number of guests from the Khorezm Region (77,000 persons; 10%).

Table 5.7 shows the change in the number of guest nights in hotels and similar accommodation facilities by regions and an autonomous republic. Between 2016 and 2019, the most significant average annual increases were in Surkandarja Region (34%), Fergana Region (25%), and Bukhara Region (20%). On the other hand, there were significant decreases in the Republic of Karakalpakstan (-37%) and Surkandarja (-29%). In terms of the share of guest nights, the city of Tashkent accounts for almost half of the total. Samarkand Region accounts for 10% of the total, and Bukhara and Tashkent Region each account for about 7% to 8%.

**Table 5.8: Hotel ratings and breakdown by regions and autonomous republic (2019)**

Unit: Unit

Region/city	1-star	2-star	3-star	4-star	five-star	Not classified	total
Uzbekistan	272	27	81	19	4	525	928
Republic of Karakalpakstan	3	1	1	-	-	19	24
Andijan	4	-	4	-	-	10	18
Bukhara	33	6	14	3	-	109	165
Djizak	5	2	6	-	-	19	32
Kashkadarya	29	2	5	2	-	22	60
Navoi	2	-	1	2	-	28	33
Namangan.	3	1	4	-	-	18	26
Samarkand	29	3	12	4	-	83	131
Surkhandarya	12	2	2	-	-	8	24
Syrdarya	8	-	1	-	-	6	15
Tashkent	30	4	5	-	-	30	69
Ferghana	22	1	2	1	-	29	55
Khorezm	9	1	7	2	-	54	73
Tashkent City	83	4	17	5	4	90	203

Source: Uzbekistan Tourism 2019, State Committee of the Republic of Uzbekistan on Statistics, 2020

Table 5.8 shows the rating of hotels in 2019 and the breakdown by regions and an autonomous republic. Ratings have been given to 43% (403 establishments) of the total (928 establishments), two-thirds of which are 1-star. Four 5-star establishments are only in Tashkent City, and 19 4-star establishments in total, with 5 in Tashkent City, 4 in Samarkand Region, and 3 in Bukhara Region, which is still limited. The challenge is to promote the rating of facilities that can be rated and increase the number of facilities with three stars or more by improving the quality of the facilities and services of hotels.

### 5.1.2. Investment incentive program for hotels and tourist facilities

The Law on Investments and Investment Activity (December 25, 2019, No. LRU-598) applies to tourism facilities in Uzbekistan. In addition, the Presidential Decree "About additional measures for stimulation of attraction of direct private foreign investments (April 11, 2005, No. UP-3594)" provides an incentive to foreign investors in the tourism sector. They are exempted from corporate profit tax, asset tax, and unified payment tax, depending on the size of the investment<sup>1</sup>.

- Between USD300,000 and USD3 million: 3 years
- Between USD3 million and USD10 million: 5 years
- Over USD10 million: 7 years

In addition, the Ministry of Investments and Foreign Trade (MIFT) has established a system of Free Economic Zones (FEZ) and Special Economic Zones (SEZ), which is an extension of Free Economic Zones. After MIFT designates FEZ/SEZ, the operator of the FEZ/SEZ is exempted from mandatory payments of land tax, corporate profit tax, corporate asset tax, unified payment tax, and the Republic Road Fund<sup>2</sup>.

- Investment amount between USD300,000 and USD3 million: 3 years
- Investment amount between USD3 million and USD5 million: 5 years
- Investment of between USD 5 million and USD 10 million: 7 years
- Investment of USD 10 million or more: 10 years. After that, the rates of corporate profits tax and unified tax will be reduced by 50% for five years.

In addition, the following benefits will be granted to businesses registered in the SEZ

- During the period of occupancy of the SEZ, raw materials, materials, and assembled parts used in the manufacture of export products (provision of services) are exempted from customs duties (excluding customs clearance fees).
- Preferential treatment is available for the settlement of import and export goods (services).

Moreover, foreign investment in hotels and tourist facilities of four stars or above will also be exempted from land tax, enterprise profit tax, and corporate asset tax for three to five years.

In addition, to address the shortage of accommodation experienced in 2018 and 2019, the Government of Uzbekistan has put in place various incentives and subsidies, as shown in Table 5.9. In June 2021, hotels under construction could be seen everywhere in Tashkent, although some construction sites have been suspended due to COVID-19. Since 2018, private houses can be used as guesthouses if the

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<sup>1</sup> This tax exemption excludes Tashkent City and Tashkent Region, but investments in the tourism sector are also eligible for tax exemption for investments in Tashkent City and Tashkent Region.

<sup>2</sup> The Free Economic Zones system was introduced by the Law on Free Economic Zones (April 25, 1996, No. 220-I) and upgraded to the Special Economic Zones system by the Law on Special Economic Zones (February 17, 2020, No. 3PY-604).

conditions are met, and guesthouses can be booked through Airbnb, Booking.com, Trip Advisor, and MyBooking.uz (Uzbekistan's accommodation booking website).

**Table 5.9: Incentives and subsidies for hotel construction**

Target	Contents
Hotel (more than ten rooms)	<ul style="list-style-type: none"> <li>- Subsidy scheme for payments to international hotel chains for hotels above three stars (USD 200 per year for three stars, USD 400 per year for 4-stars and above)</li> <li>- Subsidy scheme for each room in hotels of 3-stars and above (3 stars USD 3,800, 4 stars, and above USD 6,200)</li> <li>- Subsidies for the purchase of furnishings for 4- and 5-star hotels</li> <li>- Subsidy scheme for the construction of hotels with more than 100 rooms (USD 65,000 per room, until 2023)</li> </ul>
Guesthouse (less than ten rooms)	<ul style="list-style-type: none"> <li>- National policy to use private houses as guesthouses from 2018 (with 4.5 m<sup>2</sup> of space per tourist and a bed, shower, and toilet, they can receive tourists through online registration)</li> </ul>

Source: Compiled by the survey team based on interviews with MOTAS

In Samarkand Region, about half of the investment projects underway or planned are private projects for hotel construction, and most of them are domestically funded. Still, there are also plans to construct hotels by foreign capital. During the interview with the Department of Tourism in Samarkand Region in June 2021, it was reported that the project to build eight four-star and eight five-star hotels is underway, and 1,300 new rooms are planned to be added. In addition, a convention center and a theme park are planned to be constructed in Samarkand Region.

### 5.1.3. Large-scale tourism facility development and urban development

According to the <sup>3</sup>FEZ/SEZ website, there will be 21 FEZs across the country in September 2021, including the Charvak Free Economic Zone (9,800 ha) around Lake Charvak in Tashkent Region, which is a FEZ for tourism development. The Charvak FEZ was designated as a FEZ by the Presidential Decree "Creation of the Free Tourist Zone, CHARVAK" in 2017, and a consortium of French companies have prepared a master plan. The Charvak FEZ consists of three areas (Chimgan, Beldersay, and Nanay), of which the Chimgan area (300 ha) will be developed as a year-round tourist resort.

The Investment Department of MOTAS has prepared a master plan for the project to develop accommodation and tourism facilities as shown in Table 5.10 and intends to attract foreign investors. In addition, the government decided to implement the concept of developing lodging and tourist facilities in Aydar Lake in June 2021, which straddles the regions of Jizzakh and Karakalpakstan and plans to prepare a development plan to attract foreign investment for infrastructure development. In addition to the above, urban development related to tourism development is also scheduled in Samarkand and Bukhara Cities<sup>4</sup>.

<sup>3</sup> [https://sez-gov-uz.translate.google.ru/organization/free-economic-zone?\\_x\\_tr\\_sl=ru&\\_x\\_tr\\_tl=en&\\_x\\_tr\\_hl=ja&\\_x\\_tr\\_pto=ajax,elem](https://sez-gov-uz.translate.google.ru/organization/free-economic-zone?_x_tr_sl=ru&_x_tr_tl=en&_x_tr_hl=ja&_x_tr_pto=ajax,elem)

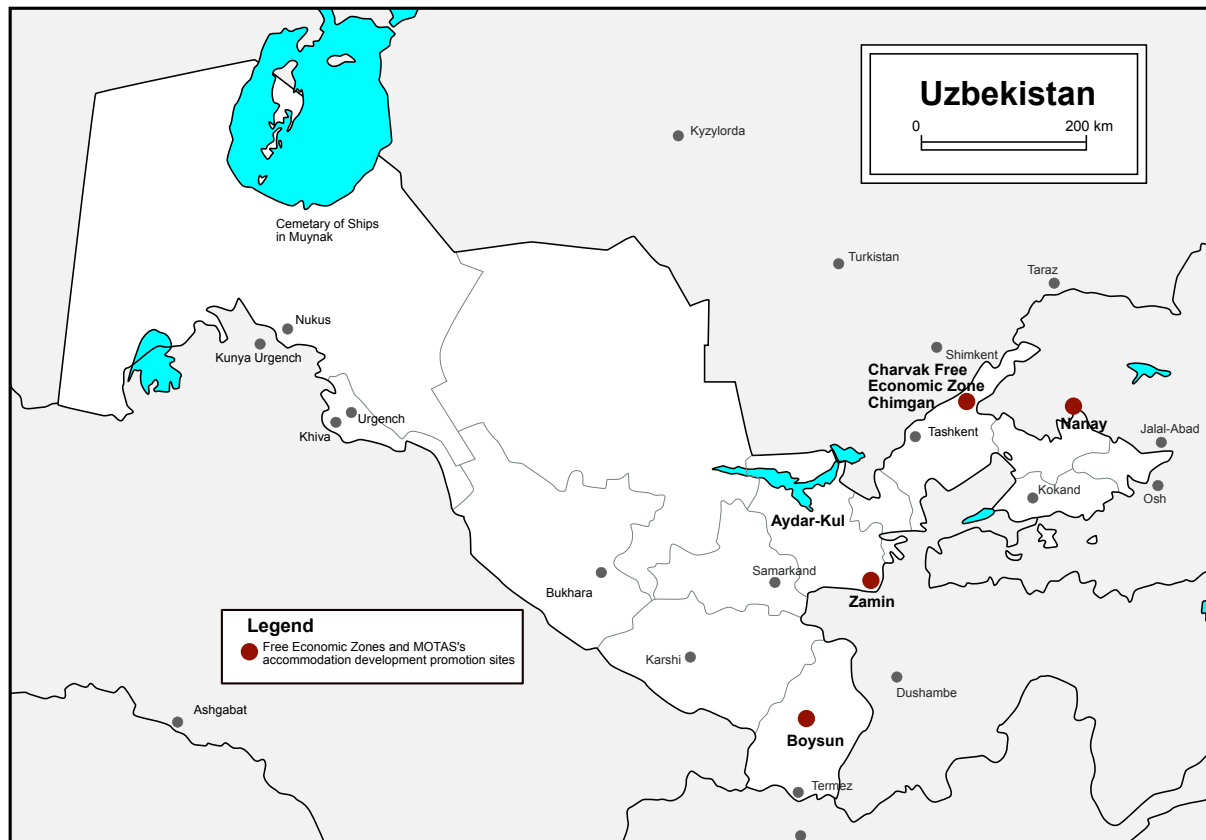
<sup>4</sup> In Samarkand City, a summit of the Shanghai Cooperation Organization (SOC) is planned for 2022, and a convention center is planned to be developed in the eastern part of Uzbekistan City to serve as the venue for the summit. In Bukhara City, a master plan is being prepared for the development of a new city block for tourism facilities in the city center.



**Table 5.10: Tourism facility development plans promoted by MOTAS**

Project name	Location	Features and progress
Chimgan	Tashkent Region	A French company has acquired 300 ha and plans to develop a resort that will attract tourists throughout the year. This is the most significant development area in Uzbekistan, and the French government has budgeted for a master plan; and the project is moving forward, but it is still in the pre-construction stage.
Zamin	Gizakh Region	The resort is being designed by Turkish architects and will be developed as a cluster with 3- and 4-star hotels, golf courses, sports facilities, shopping centers, ropeways, cottages, and residential areas. It will also attract a hospital for medical tourism. The President has already approved the project, and bidding for the construction will be held soon.
Nanay.	Namangi Region	The project intends to develop a tourist resort for Uzbeks and will be divided into four areas and phases. A master plan prepared by a Turkish company has been submitted via MOTAS, but the government has not yet approved the development.
Boysun	Surkhandarya Region	The project will develop a tourist facility with a Yurta camp, hotel, ropeway, and recreational facilities. The target market is Afghans. A master plan prepared by a Turkish company has been submitted via MOTAS, but the government has not yet approved the development.

Source: Compiled by the survey team from the information of Investment Department, MOTAS.



Source: Compiled by the survey team from the information of Investment Department, MOTAS.

**Figure 5.1: Location of the tourism facility development projects**

#### 5.1.4. Example of a hotel project

The survey team interviewed the responsible person of a Japanese company building a hotel in Tashkent. He said that the hotel was being constructed on schedule despite the pandemic and was scheduled for the soft opening in December 2021. The Uzbekistan-born person in charge of the project has been able to build the project and utilize the incentives as planned by hiring local human resources as managers, communicating smoothly with Tashkent City, and overcoming the barriers to using the investment

incentives.

As the hotel nears completion, it will be necessary to secure human resources to work in the hotel. The person in charge of this project is considering having students studying tourism at the university work in the hotel to get jobs after graduation. He also said that he would like students who wish to work in accommodations to become proficient in the Property Management System (PMS), which manages the rooms and facilities of accommodations.

#### Hotel under construction by HIS in Tashkent

Construction and operation entity	"HHHCENTRALASIA (a 100% Uzbekistan subsidiary of H.I.S. Hotel Holdings)
commencement of construction	February 1, 2020
Opening schedule	December 1, 2021
project cost	Approx. 1.4 billion yen
Building size	One basement floor, five floors above ground
Number of Rooms	140 rooms (about 33 rooms on each floor, at least 20 to 30 square meters in size)

Rendering of the completed building



Source: Prepared by the survey team based on a field survey and JETRO website "H.I.S. Hotel Holdings starts hotel construction in Tashkent" (<https://www.jetro.go.jp/biznews/2020/02/ea16c8d394a4c63e.html>)

#### 5.1.5. Activities of the Hoteliers' Association

The Hoteliers' Association has three objectives: (1) to train hotel employees, (2) to introduce digital tools into the hotel business, and (3) to introduce a service-conscious hotel rating system.

MOTAS wants to increase the number of accommodation rooms from 20,000 in 2018 to 64,000 in 2025, as shown in Table 2.6 in Section 2.1.3. Uzbekistan's institutions for the training of accommodation personnel include universities and colleges (two-year educational institutions in which 12th graders are enrolled). Still, graduates from these institutions are not at a level where they can work directly in hotels. For this reason, the Hoteliers' Association has set up a training institute to develop personnel who can work in hotels. The association wants to accept people of all ages who are currently working in hotels or who want to work in hotels as students in the future. It would like to collect the tuition from the hotel

where the student belongs, but the challenge will be whether it will recognize human resource development as an investment and pay the tuition. The Hoteliers' Association also wants to change the image of hotel workers, who are not considered to have a high status.

Regarding (2), the association intends to develop a hotel management system (Property Management System: PMS) for Uzbekistan that can be used by medium-sized hotels in cooperation with the Russian company Travelline<sup>5</sup> and introduce it to our member hotels.

As for (3), the Uzbekistan Standards Agency (UZSTANDARD<sup>6</sup>) has established standards for rating hotels, but these standards are biased towards facilities and equipment. International brand hotels have their standards, which also take service into account, but they do not always match the standards of Uzbekistan's hotels. Therefore, the association would like to develop a standard for hotels that also take service into account but is considering which country's rating should be used as a model. Hotel standards used to be given by the government, but now the association believes that the private sector can set its standards.

## 5.2. Kyrgyz Republic

### 5.2.1. Statistics on tourism facilities

Table 5.11 and Table 5.12 are statistics in UNWTO's "Compendium of Tourism Statistics," 2020 & 2021 editions. Table 5.11 shows the number of accommodation facilities and hotel rooms in the Kyrgyz Republic. In 2019, accommodation facilities were 525, of which hotels and similar establishments were 207, and those rooms were about 4,300. Since 2014, the number of accommodation facilities has increased by 3%, hotels and similar facilities by 4% per annum, and hotel rooms by 7% per annum.

**Table 5.11: Number of accommodations and hotel rooms in the Kyrgyz Republic (UNWTO)**

Accommodation units and rooms	2014	2015	2016	2017	2018	2019
Number of accommodations (units)	450	464	466	480	486	525
Number of "hotels and similar establishments" (units)	171	199	192	196	194	207
Number of rooms (rooms)	3,084	3,951	4,062	4,229	4,588	4,322

Source: Compendium of Tourism Statistics, 2020 Edition & 2021 Edition

Table 5.12 shows that the number of international accommodation guests and guest nights in 2019 was 83,000 and 231,000, increasing 14% and 22% per annum respectively since 2014. In the same year, domestic accommodation guests and guest nights were 155,000 and 231,000, respectively, showing a slight increase since 2014.

<sup>5</sup> <https://www.travelline.pro/>

<sup>6</sup> <https://www.standart.uz/en/site/index>

**Table 5.12: Accommodation guests and guest nights in the Kyrgyz Republic (UNWTO)**

Guests and guests-nights	2014	2015	2016	2017	2018	2019
Inbound						
Guests (000 persons)	44	64	76	77	103	83
Overnights (000 person-nights)	85	125	169	194	256	231
Domestic						
Guests (000 persons)	155	165	151	161	153	155
Overnights (000 person-nights)	211	235	242	258	230	231

Source: Compendium of Tourism Statistics, 2020 Edition & 2021 Edition

Table 5.13 onwards shows the statistical data published in "Tourism in Kyrgyzstan 2015-2019" of the State Statistical Committee of the Kyrgyz Republic. Table 5.13 shows the changes in accommodation over the five years up to 2019, classified as hotels and sanatoriums, travel agencies' facilities, natural parks, nature reserves, and others<sup>7</sup>.

**Table 5.13: Number of accommodation facilities**

Unit: Units

Kind of accommodations	2015	2016	2017	2018	2019
Total	464	466	480	486	525
Hotels and similar accommodation facilities	199	192	196	194	207
Sanatoriums and other accommodation	180	187	190	187	192
Travel agencies and tour operators, travel and excursion bureaus	55	55	60	64	71
Nature parks and reserves	nine	eight	nine	nine	10
Other tourism enterprises	21	24	25	32	45

Source: Tourism in Kyrgyzstan 2015-2019, National Statistics Committee of the Kyrgyz Republic

Table 5.14 shows a breakdown of accommodation by region/city. Regarding the total accommodation facility, 37% of 525 accommodation facilities are in Issyk-Kul Region and 18% in Bishkek City, respectively. 24% of hotels are in Bishkek City, 75% of sanatoriums are located in Issyk-Kul Region, and 62% of travel agencies' facilities are located in Bishkek City.

**Table 5.14: Breakdown of accommodation by regions/cities (2019)**

Unit: Units

Region/city	Hotels and similar accommodation facilities	Sanatoriums and other accommodation	Travel agencies and tour operators, travel and excursion bureaus	Nature parks and reserves	Other tourism enterprises	Total
Total	207	192	71	10	45	525
Batken	18	6	-	2	1	25
Jalal-Abad	38	17	-	1	-	57
Issyk-Kul	31	144	3	2	17	196
Naryn	24	1	17	2	25	69
Osh	5	8	-	1	-	15
Talas	6	3	1	2	1	12
Chui	16	11	5	1	-	34
Bishkek City	49	-	44	2	1	94
Osh City	20	2	1	1	-	23

Source: Tourism in Kyrgyzstan 2015-2019, National Statistics Committee of the Kyrgyz Republic

<sup>7</sup> Travel agency facilities are lodging, and tourist facilities owned by travel agencies, and are considered to include both urban lodging and tourist facilities and a variety of lodging and tourist facilities such as camps for mountain climbing and trekking and Yurta camps in rural areas. Nature parks and nature reserves are supposed to include camps and Yurta camps in nature parks and nature reserves, and others are supposed to include guesthouses operated by individuals.

Table 5.15 shows the number of accommodation guests. The number of accommodation guests was approximately 810,000 in 2019. The figures for 2019 show that sanatorium guests accounted for 41% of the total guests, and hotel guests accounted for 28%.

Compared to the guest numbers from 2015 to 2019, guest numbers are growing at an annual rate of 3%. Guest numbers for hotels and sanatoriums remain flat, while travel agency properties (18%), nature parks and preserves (7%), and other accommodations (13%) show higher annual growth rates.

**Table 5.15: Number of guests at tourist facilities**

Unit: persons

Kind of accommodation	2015	2016	2017	2018	2019
Total	706,366	627,555	727,759	749,931	809,589
Hotels and similar accommodation facilities	228,503	226,847	237,766	255,319	230,702
Specialized resuscitation facilities for sanatoriums and other accommodation	332,579	241,035	331,007	287,194	328,447
Travel agencies and tour operators, travel and excursion bureaus	10,803	14,506	16,977	27,798	25,133
Nature parks and reserves	53,749	66,751	55,648	77,839	75,556
Other tourism enterprises	80,732	78,416	86,361	101,781	149,751

Source: Tourism in Kyrgyzstan 2015-2019, National Statistics Committee of the Kyrgyz Republic

Table 5.16 shows the number of accommodation guests in 2019 by region/city. Like accommodation facilities, hotels have the highest number of guests in Bishkek City (41%) and sanatoriums in the Issyk-Kul Region (80%). Travel agency facilities are concentrated in Bishkek City (39%) and Batken Region (38%), while natural parks and nature reserves facilities are concentrated in Issyk Kul Region (31%), Osh Region (31%), and Jalalabad Region (27%).

**Table 5.16: Breakdown of tourism facility guests by regions/cities (2019)**

Unit: persons

Region/city	Hotels and similar accommodation facilities	sanatoriums and other accommodation	Travel agencies, tour operators, travel and excursion bureaus	Nature parks and reserves	Other tourism enterprises
Total	230,702	328,447	25,133	75,556	149,751
Batken	11,325	2,361	9,590	-	-
Jalal-Abad	32,733	25,156	-	20,772	-
Issyk-Kul	19,832	264,213	576	23,233	10,725
Naryn	7,447	174	3,421	5,698	19,806
Osh	513	7,395	-	23,754	-
Talas	2,691	1,652	732	666	119,220
Chui	16,134	26,532	1,101	1,433	-
Bishkek City	107,791	-	9,713	-	-
Osh City	32,236	964	-	-	-

Source: Tourism in Kyrgyzstan 2015-2019, National Statistics Committee of the Kyrgyz Republic

Table 5.17 shows the breakdown of accommodation guests by country groups in 2019. Eighty percent (640,000 persons) of accommodation guests are domestic tourists, and approximately 20% (170,000 persons) are international tourists. 42% (270,000 persons) of tourists from the Kyrgyz Republic and 61% (57,000 persons) of tourists from CIS constituent countries stayed in sanatoriums; 71% (52,000 persons) of international tourists from non-CIS constituent countries stayed in hotels. In section 2.2, annual overnight visitors (tourists) from 2014 to 2019 is at the level of 300,000 to 400,000 according to

UNWTO's statistics, while the figures for foreign tourists in Table 5.17 are lower than UNWTO's statistics.

**Table 5.17: Number of accommodation guests by country groups (2019)**

Unit: persons

Kind of accommodation	Total	From Kyrgyz Rep	From CIS countries	From other countries
Total	809,589	642,967	93,933	72,689
Hotels and similar accommodation facilities	230,702	147,504	31,508	51,690
Sanatoriums and other accommodation	328,447	267,380	57,176	3,891
Travel agencies and tour operators, travel and excursion bureaus	25,133	11,847	1,331	11,955
Nature parks and reserves	75,556	68,499	1,958	5,099
Other tourism enterprises	149,751	147,737	1,960	54

Source: Tourism in Kyrgyzstan 2015-2019, National Statistics Committee of the Kyrgyz Republic

Table 5.18 provides a breakdown of the accommodation guest stays in the Kyrgyz Republic in 2019. For the whole accommodation facility, day stay accounted for 33% (270,000 persons) of all stays and 42% (340,000 persons) of stays between one and three nights. For hotels, 1 to 3 nights accounted for 86% (200,000 persons) of all stays, primarily three nights or less. Sanatoriums stayed longer than hotels, with 33% (110,000 persons) of all nights spent between 4 and 7 nights and 19% (64,000 persons) between 8 and 28 nights. Travel agency facilities and those in nature parks and reserves are more likely to be day stays or stays of up to three nights, with 81% (20,500 persons) and 92% (69,000 persons) respectively.

**Table 5.18: Breakdown of accommodation guest stays in Kyrgyz Republic (2019)**

Unit: persons

Kind of accommodation	Total	Day stay	1-3 nights	4-7 nights	8-28 nights	29-91 nights
Total	809,589	265,076	340,503	131,817	68,989	3,204
Hotels and similar accommodation facilities	230,702	9,580	197,507	17,381	5,261	973
Sanatoriums and other accommodation	328,447	30,375	122,225	109,998	63,618	2,231
Travel agencies and tour operators, travel and excursion bureaus	25,133	20,432	4,249	376	76	-
Nature parks and reserves	75,556	69,351	6,205	-	-	-
Other tourism enterprises <sup>1</sup>	149,751	135,338	10,317	4,062	34	-

Source: Tourism in Kyrgyzstan 2015-2019, National Statistics Committee of the Kyrgyz Republic

## 5.2.2. Accommodation developments around Issyk-Kul Lake

As shown in Table 5.14, many accommodation facilities have been developed in Issyk-Kul Region. Sanatoriums and other recreational facilities using hot springs have been established on the northern shore of Issyk-Kul Lake, and Yurta camps have been found around Bokonbayevo on the southern coast of Issyk-Kul. In addition, there is a cluster of tourist facilities, mainly guesthouses, in Karakol, which is the base for tourism in Issyk-Kul Lake.

The survey team conducted a field survey of tourist facilities on the north and south shores of Issyk-Kul Lake. Many of the tourist facilities on the northern coast of Issyk-Kul Lake have a history as tourist

destinations where tourists from Kyrgyzstan and neighboring countries and the Russian Federation stay, and many of them have been constructed over time. On the other hand, there are also examples of new concepts for welcoming tourists, such as selling tourist facilities as coworking spaces in light of the development of the ICT industry in Kyrgyzstan and the pandemic, and examples of Kyrgyz government accommodations that accept general visitors.



Beach on the north shore of Issyk-Kul Lake



Resort facility for coworking space

A challenge for tourism on the north shore of Issyk-Kul Lake is sewage treatment. According to the Regional Government of Issyk-Kul, the development of sewage treatment facilities falls under the jurisdiction of the municipal government. Still, there is a general lack of such facilities. Some facilities are operated by municipalities, while others are privately owned and operated with their treatment facilities, and cooperation among resorts may be possible. In the future, there are plans to build new sewage treatment facilities in Karakol, Cholpon Ata, and Balkuchi with the support of ADB and EBRD. There is also a tendency for tourists to concentrate in certain resorts around Cholpon Ata. The regional government intends to create a beach development concept in the region's tourism development strategy, which is being carried out with the support of the World Bank to diversify tourists. In addition, the north shore of Issyk-Kul Lake can receive tourists throughout the year, but at the moment, there are only about five resorts that operate during the winter, and most of the private resorts are closed.

The Yurta camps have been developed along with the CBT development on the southern shore of Issyk-Kul Lake. In recent years, several Yurta camps have been established around Song Kol Lake in Naryn Region, and the number of tourist guests, mainly from Europe and the United States, is increasing. The development of these Yurta camps has created local employment for camp management, and activities to introduce nomadic cultures such as horse riding, falconry, tusk performances, and traditional music are also being conducted.

Similar to the north shore of Issyk-Kul Lake, sewage treatment and waste management is becoming an issue in the Yurta camps of the south coast of Issyk-Kul Lake and Song Kol Lake. Septic tanks are used for storage and waste management for sewage treatment, and garbage is collected separately.



Yulta Camp at Song Kol Lake



Waste segregation and collection at Betlam Yurta Camp

### 5.3. Kazakhstan

Table 5.19 and Table 5.20 are the statistical data in UNWTO's "Compendium of Tourism Statistics," 2020 & 2021 editions. Table 5.19 shows the number of accommodation facilities and hotel rooms in Kazakhstan. In 2019, the number of hotels was about 3,600, and the number of hotel rooms was about 76,000. Since 2014, hotels and hotel rooms have increased at an annual rate of 12% and 9%, respectively.

**Table 5.19: Number of accommodations and hotel rooms in Kazakhstan (UNWTO)**

Accommodation units and rooms	2014	2015	2016	2017	2018	2019
Number of "hotels and similar establishments" (units)	2,056	2,338	2,754	2,987	3,322	3,592
Number of rooms (rooms)	49,128	53,126	60,427	65,791	71,858	75,913

Source: Compendium of Tourism Statistics, 2020 Edition & 2021 Edition

Table 5.20 shows 925,000 guest nights for international tourists and 4,871,000 guest nights for domestic tourists in 2019, an increase of 7% and 10% per annum, respectively, since 2014. The increase in domestic tourist guest nights has been more significant than international tourists.

**Table 5.20: Hotel guests and nights spent in Kazakhstan (UNWTO)**

Inbound/domestic overnights	2014	2015	2016	2017	2018	2019
Inbound overnights (000 person-nights)	659	605	677	872	812	925
Domestic overnights (000 person-nights)	2,978	2,685	3,245	4,195	4,415	4,871

Source: Compendium of Tourism Statistics, 2020 Edition & 2021 Edition

Table 5.21 shows the breakdown of the number of accommodations and rooms per region/city in 2019. The distribution of accommodation by region/city shows that the number of accommodations is higher in the East Kazakhstan Region (576), Almaty Region (540), and Almaty City (339). The number of accommodation rooms is higher in Almaty City (11,828), East Kazakhstan Region (10,743), Almaty Region (9,941), and Nur-Sultan City (8,253).

Table 5.22 shows the breakdown of rated accommodation in Kazakhstan by region/city. Although the level of rated accommodation is less than 10% of the total, 5-star and 4-star accommodation is



predominant in Nursultan City and Almaty City.

**Table 5.21: Breakdown of the number of accommodations and rooms by regions/cities**

Region/city	Number of facilities	Number of rooms
Republic of Kazakhstan	3,592	75,913
Akmola	370	5,221
Aktobe	105	2,052
Almaty	540	9,941
Atyrau.	100	2,977
West Kazakhstan	67	1,700
Zhambyl	185	2,215
Karagandy	250	4,624
Kostanai	141	2,295
Kyzylorda	108	1,448
Mangystau	92	3,226
Pavlodar	112	3,058
North Kazakhstan	119	1,799
Turkistan	164	2,092
East Kazakhstan	576	10,743
Nur-Sultan City	208	8,253
Almaty City	339	11,828
Shymkent City	116	2,441

Source: Kazakhstan Tourism 2015-2019, Committee on Statistics, Ministry of National Economy, 2020

**Table 5.22: Breakdown of rated accommodation by regions/cities**

Unit: Unit

Region/city	Total	five-star	4-star	3-star	2-star	1-star	Not classified	Others
Republic of Kazakhstan	3,592	24	71	85	15	10	1 890	1 497
Akmola	370	x	7	9	x	x	139	207
Aktobe	105	-	x	x	x	-	61	39
Almaty	540	-	x	-	-	-	x	317
Atyrau	100	3	x	x	-	x	61	13
West Kazakhstan	67	-	3	x	1	-	x	31
Zhambyl	185	x	4	4	-	x	151	23
Karagandy	250	x	6	2	2	x	138	98
Kostanai	141	-	x	x	-	-	105	29
Kyzylorda	108	1	x	x	-	1	x	x
Mangystau.	92	3	x	4	x	-	60	23
Pavlodar	112	-	-	6	x	x	52	51
North Kazakhstan	119	-	-	4	-	-	52	63
Turkistan	164	-	-	-	-	-	113	51
East Kazakhstan	576	x	x	5	x	x	x	x
Nur-Sultan City	208	6	15	x	x	-	152	21
Almaty City	339	6	15	11	-	-	209	98
Shymkent City	116	x	x	-	-	-	87	x

Note: x indicates that the data is confidential, and - indicates that the information does not exist.

Source: Kazakhstan Tourism 2015-2019, Committee on Statistics, Ministry of National Economy, 2020

Table 5.23 breakdown of accommodation guests in Kazakhstan by regions/cities. In the total number of accommodation guests (both domestic and international tourists), 21% of all guests stayed in Almaty City, 14% in Nursultan City, and 13% in Almaty Region. Domestic tourists are staying more in other regions with 17% in Almaty City, 16% in Almaty Region, and 12% in Nur-Sultan City, while international tourists are staying 44% in Almaty City and 24% in Nur-Sultan City, with more than two-thirds of the total staying in these two cities.

**Table 5.23: Breakdown of accommodation guests in Kazakhstan by regions**

Region/city	Nonresident	Resident	Total
Republic of Kazakhstan	979,781	5,286,782	6,266,563
Akmola	18,501	376,434	394,935
Aktobe	14,437	118,980	133,417
Almaty	4,751	829,431	834,182
Atyrau.	x	X	-
Batys Kazakhstan	21,867	86,587	108,454
Zhambyl	4,721	139,260	143,981
Karagandy	21,198	298,465	319,663
Kostanai	22,435	215,129	237,564
Kyzylorda	2,284	69,385	71,669
Mangystau.	23,558	198,981	222,539
Pavlodar	12,212	151,238	163,450
Soltustik Kazakhstan	x	x	-
Turkistan	x	x	-
Shygys Kazakhstan	29,741	582,948	612,689
Nur-Sultan city	236,280	635,571	871,851
Almaty city	435,699	898,531	1,334,230
Shymkent city	33,362	215,951	249,313

Note: x indicates that the data is confidential, and - indicates that the information does not exist.

Source: Kazakhstan Tourism 2015-2019, Committee on Statistics, Ministry of National Economy, 2020

Table 5.24 shows the number of accommodation guests and guest nights for international tourists in 2019. As also shown in Table 5.23, the number of international accommodation guests was 980,000 in the year. Guest nights were 1.49 million, with an average night stay of 1.5 nights; accommodation guests from CIS constituent countries stayed 1.6 days, while international tourists from other countries stayed an average of 1.5 days.

**Table 5.24: Number of accommodation guests and guest nights for international tourists**

Origin areas	Hotel guests (persons)	Guest night (bed-nights)
From CIS countries	458,780	722,772
From outside CIS countries	521,001	764,200
Total	979,781	1,486,972

Source: Kazakhstan Tourism 2015-2019, Committee on Statistics, Ministry of National Economy, 2020

#### 5.4. Tajikistan

Information on accommodation in Tajikistan is minimal. As shown in Table 5.25, there were 229 accommodation facilities in Tajikistan in 2018, increasing 1.8 times since 2014 according to UNWTO statistics. Of which, 189 are hotels and other facilities in the same year.

**Table 5.25: Number of accommodations in Tajikistan (UNWTO)**

Accommodations	2014	2015	2016	2017	2018
Accommodation for visitors (units)	124	132	163	172	229
of which "hotels and similar establishments" (units)	...	...	...	...	189

Source: Compendium of Tourism Statistics, 2020 Edition & 2021 Edition

## 6. Tourism infrastructure

### 6.1. Central Asia

#### 6.1.1. Statistics on tourism infrastructure

Table 6.1 and Table 6.2 show statistics of tourism infrastructure such as road, rail, and aviation of the five Central Asian countries and some analyses by the survey team.

**Table 6.1: Statistical data on tourism infrastructure (Central Asia)**

Area	Item	Kazakhstan	Kyrgyz Rep.	Tajikistan	Uzbekistan	Turkmenistan
Transport	Share of transport mode in total inland passenger-km, Road (%; 2016) <sup>*1</sup>	79.1	90.1	91.4	90.6	90.8
	Share of transport mode in total inland passenger-km, Rail (%; 2016) <sup>*1</sup>	0.8	0.4	0.0	0.7	0.0
	Share of transport mode in total inland passenger-km, Aviation (%; 2016) <sup>*1</sup>	20.2	9.5	8.6	8.7	9.2
Road	Roadways (km) <sup>*2</sup>	95,409 (2017)	34,000 (2018)	30,000 (2018)	84,496 (2000)	58,592 (2002)
	Paved roadways (km) <sup>*2</sup>	81,814 (2017)	-	-	75,511 (2000)	47,577 (2002)
	Percentage of paved roadways	85.7 %	-	-	89.3 %	81.2 %
	Road density (m/km <sup>2</sup> ) (2018) <sup>*1</sup>	112.3	145.2	114.9	151.5	434.3
	Road traffic crash fatalities (deaths per 100,000 population) (2016) <sup>*1</sup>	17.6	15.4	18.1	11.5	14.5
Rail	Railways (km) (2018) <sup>*1</sup>	16,061	424	620	4,642	7,680
	Railway density (m/km <sup>2</sup> ) (2018) <sup>*1</sup>	5.9	2.2	4.4	10.9	16.3
	Railways, passengers carried (million passenger-km) (2017) <sup>*3</sup>	19,241	43	28	4,294	2,340
Aviation	Number of registered air carriers (2020) <sup>*2</sup>	12	5	2	2	1
	Number of airports (2013) <sup>*2</sup>	96	28	24	53	26
	Airports with paved runways (2013) <sup>*2</sup>	63 (2017)	18 (2017)	17 (2013)	33 (2013)	21 (2013)
	Airports with paved runways - over 3,047 m <sup>*2</sup>	10 (2017)	1 (2017)	2 (2013)	6 (2013)	1 (2013)
	Airports with paved runways - 2,438 to 3,047 m <sup>*2</sup>	25 (2017)	3 (2017)	4 (2013)	13 (2013)	9 (2013)
	Passenger Traffic - domestic (million) (2019 est.) <sup>*4</sup>	5.4	0.6	-	0.7	1.3
	Passenger Traffic - international (million) (2019 est.) <sup>*4</sup>	6.3	2.5	2.1	4.7	0.9
Electric Power	Electrification - total population (2020) <sup>*2</sup>	100.0	100.0	100.0	100.0	100.0
Water	% of population who can access to improved drinking water source (total/urban/rural) (%; 2017 est.) <sup>*2</sup>	97.4 100.0 93.8	89.3 97.1 84.4	83.5 96.2 78.6	97.8 100.0 96.1	100.0 100.0 100.0
	% of population who can access to improved sanitation facility access (total/urban/rural) (2017 est.) <sup>*2</sup>	99.9 99.9 100.0	99.3 99.6 100.0	99.4 99.7 99.3	100.0 100.0 100.0	100.0 100.0 100.0
	Mobile cellular - subscriptions per 100 inhabitants (% 2019 est.) <sup>*2</sup>	135.96	145.98	111.53	110.15	162.86
Communication	Internet uses - percent of the population (%; 2018 est.) <sup>*2</sup>	78.9	28.0	22.0	52.3	21.3
	Access to a healthcare facility within 60 minutes by car (% of the population) (2019) <sup>*1</sup>	42	79	75	66	19
Medical Care	Physicians' density (physicians/ 1,000 population) (2014) <sup>*2</sup>	3.98	2.21	2.10	2.37	2.23
	Hospital bed density (beds/1,000 population) (2014) <sup>*2</sup>	6.1	4.4	4.7	4.0	4.0

Note: "-" indicates data is not available.

Sources: \*1 Asian Transport Outlook Database (<https://data.adb.org/dataset/asian-transport-outlook-database>) as of June 7, 2021; \*2 The World Factbook, Central Intelligence Agency (<https://www.cia.gov/the-world-factbook/>), as of July 26, 2021, \*3 World Development Indicators (<https://databank.worldbank.org/>), as of July 21, 2021, \*4 Impact of worldbank.org/, as of July 21, 2021, \*4 Impact of COVID-19 on CAREC Aviation and Tourism Asian Development Bank, February 2021

**Table 6.2: Analyses by the study team on tourism Infrastructure (Central Asia)**

Area	Description
Transport	As for shares of transport modes in total inland passenger-km, aviation has approximately 20 % in Kazakhstan, the largest land area among the five Central Asian countries. Those in the other four countries are less than 10 %. Figures of rail are less than 1% even in Kazakhstan, which has the largest share.
Road	Road pavement rates exceed 80 % in three countries with data, and Uzbekistan reaches nearly 90%. Tajikistan and Kazakhstan have a more significant number of traffic accidents per capita among the five countries.
Rail	Among the five countries, rail service in the Kyrgyz Republic and Tajikistan has not developed, and those numbers of passengers are also small.
Aviation	Kazakhstan has the most significant number of airports compared to the other four countries and has the most considerable number of passengers for domestic and international flights. Passengers of domestic flights in Uzbekistan are not many compared to the other countries. However, international flights are many compared to the other three countries except Kazakhstan.
Electric Power	Electrification rates on a population basis are 100 % in all five countries.
Water	In urban areas, access to safe drinking water on a population basis is 100 % or nearly 100 % in all five countries. In rural areas, Tajikistan (78.6%) and the Kyrgyz Republic (84.4%) are relatively low. Access to toilets is 100% or nearly 100% in all the five countries.
Communication	There is a relatively significant difference in percentages of internet users in the five countries. The rate of internet users reaches nearly 80 % in Kazakhstan, while those percentages are approximately 50 % in Uzbekistan, 30 % in the Kyrgyz Republic, and 20 % in Tajikistan and Turkmenistan.
Medical care	Percentages of the population who can access medical institutions within 60 minutes by cars are 42 % in Kazakhstan and 19 % in Turkmenistan, which is lower than figures in the other three countries.

Source: Survey team

### 6.1.2. Transport network

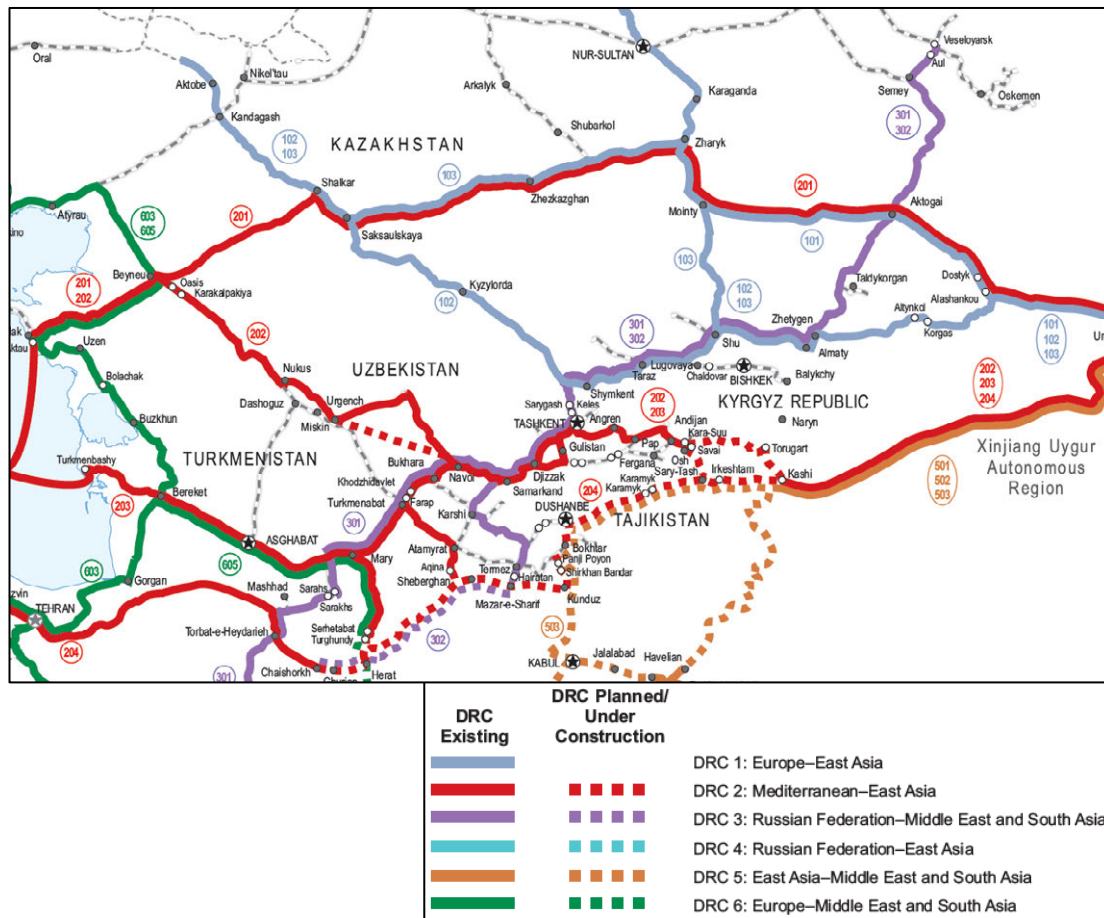
The Central Asia Regional Economic Cooperation Transport and Trade Facilitation Strategy 2020 (CAREC TTFS 2020) and CAREC Transport Strategy 2030 (CAREC Transport Strategy 2030) plan the future shape of the road and rail network as shown in Figure 6.1 and Figure 6.2, and set out development and policy measures in line with these plans. It seems that this road and rail network will be the base for the tourism sector in the five Central Asian countries. In this network, many corridors intersect in Tashkent, Samarkand, and Bukhara in Uzbekistan and Dushanbe in Tajikistan.



Note: DRC = designated rail corridor

Source: Drawn by the survey team regarding the CAREC Transport Strategy, Asian Development Bank, January 2020

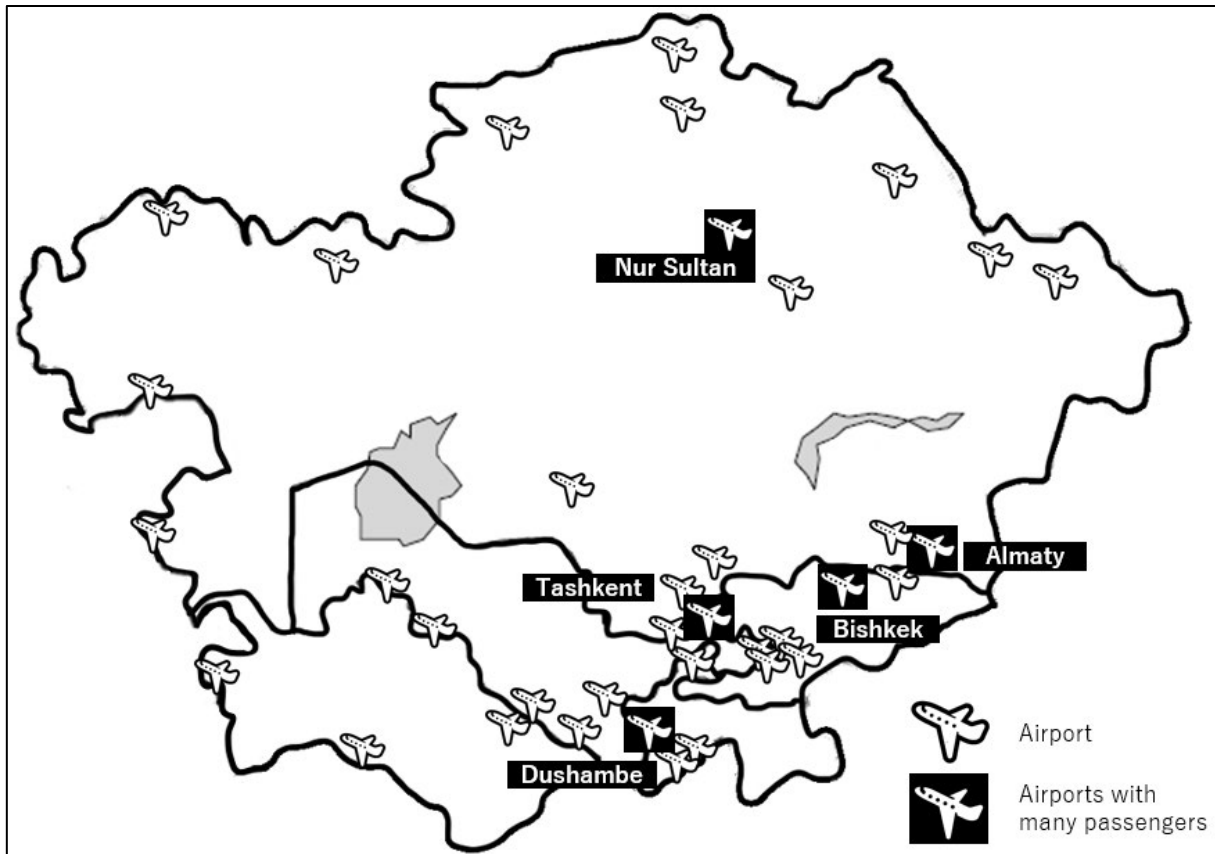
**Figure 6.1: CAREC's road network (six corridors)**



Source: Drawn by the survey team regarding the CAREC Transport Strategy, Asian Development Bank, January 2020

**Figure 6.2: CAREC's rail network**

Figure 6.3 shows the locations of the airports in the five Central Asian countries. Table 6.3 lists major airports and those passengers in 2019. Tashkent (Uzbekistan) has the highest number of international passengers with 4.1 million, followed by Nur-Sultan (Kazakhstan) with 3.7 million and Almaty (Kazakhstan) with 3 million. In interviews with travel agencies during the field survey, opinions were raised that flights are often canceled or changed, and there are many late-night departures and arrivals in Central Asia. Flights in Turkmenistan are particularly unstable and challenging to be used for tours.



Source: Drawn by the survey team regarding the World Bank Maps (<https://maps.worldbank.org/>)

**Figure 6.3: Airports in five Central Asian countries**

**Table 6.3: Airports with the highest passenger traffic in five Central Asian countries, 2019**

Unit: millions of people

City	Country	Domestic flights	International flights	Total
Almaty	Kazakhstan	3.4	3.0	6.4
Nur-Sultan	Kazakhstan	3.2	3.7	6.2
Tashkent	Uzbekistan	0.6	4.1	4.7
Bishkek	Kyrgyz Republic	0.6	1.6	2.2
Dushanbe	Tajikistan	-	1.4	1.4

Note: The breakdown of domestic and international passenger traffic in Tashkent is an estimate

Source: Impact of COVID-19 on CAREC Aviation and Tourism, Asian Development Bank, February 2021.

As shown in Table 6.4, CAREC Transport Strategy 2030 sets out five major pillars and goals as a strategic framework.

**Table 6.4: Strategic framework of CAREC Transport Strategy 2030**

Pillars	Connectivity objective	Sustainability objective
Cross-border transport and logistics	<ul style="list-style-type: none"> <li>- Implementation of transport facilitation agreements and conventions and fostering regional transportation dialogue</li> <li>- Improvement of border crossing facilities and procedures</li> <li>- Development of ports and logistics centers facilities and operations to support seamless interoperability of all modes of transport</li> </ul>	<ul style="list-style-type: none"> <li>- Reduced cost of trade, increased trade, and economic growth</li> <li>- Increased efficiency and integrity of public institutions</li> <li>- Improved safety and security</li> </ul>
Road and street asset management	<ul style="list-style-type: none"> <li>- Sufficient allocation of funds for construction, rehabilitation, and maintenance of roads</li> <li>- Strategic long-term planning for the development of the regional and national transport networks to meet growing social, economic, and trade connectivity needs</li> </ul>	<ul style="list-style-type: none"> <li>- Improved economic and social conditions through better connectivity</li> <li>- Strong focus on lifecycle costing and quality for more sustainable infrastructure investments</li> <li>- Financing allocation based on robust analytical and decision support tools, such as the Road Asset Management System (RAMS)</li> <li>- Institutional and procedural reforms for improved national road asset management</li> <li>- Increased private sector participation in road operation and maintenance</li> </ul>
Road safety	<ul style="list-style-type: none"> <li>- Improved propensity to travel due to increased safety</li> </ul>	<ul style="list-style-type: none"> <li>- Increased road safety leads to reduced life and health impacts, and economic losses</li> </ul>
Railways	<ul style="list-style-type: none"> <li>- Construction, rehabilitation, modernization, and maintenance of railroads</li> <li>- Development of stations and intermodal facilities</li> <li>- Purchase and maintenance of rolling stock suited to emerging needs</li> <li>- Effective commercial and efficient operational practices</li> <li>- Digitalization of railways to improve operational coordination and to support management decision making</li> </ul>	<ul style="list-style-type: none"> <li>- Improved economic and social conditions through reduced service cost and improved quality of service</li> <li>- Sustainable operational practices, inclusive financial and lifecycle cost management, railways assets management and upgrade, staff qualifications</li> <li>- Enhanced safety and security for all users, especially women</li> <li>- Improved environmental sustainability through the modal shift, energy efficiency improvements, and fuel switch</li> </ul>
Aviation	<ul style="list-style-type: none"> <li>- Development of airports and public transport linkages</li> <li>- Regional and national policies and agreements to foster open markets competition and cooperation</li> <li>- Improved efficiency of air freight</li> </ul>	<ul style="list-style-type: none"> <li>- Increased economic opportunities through trade, industry, and tourism</li> <li>- Increased efficiency, safety, and security</li> <li>- Improved economic and social conditions through reduced service cost and improved quality of service</li> </ul>

Source: CAREC Transport Strategy, Asian Development Bank, January 2020.

## 6.2. Uzbekistan

Although some sections need repair, such as the road to Khiva in western Uzbekistan, intercity roads in Uzbekistan have improved significantly. A railway network has been expanded, including high-speed railways to Khiva and Turkistan in Kazakhstan. A transport network that connects significant tourist destinations in Uzbekistan, including aviation, has been developed.

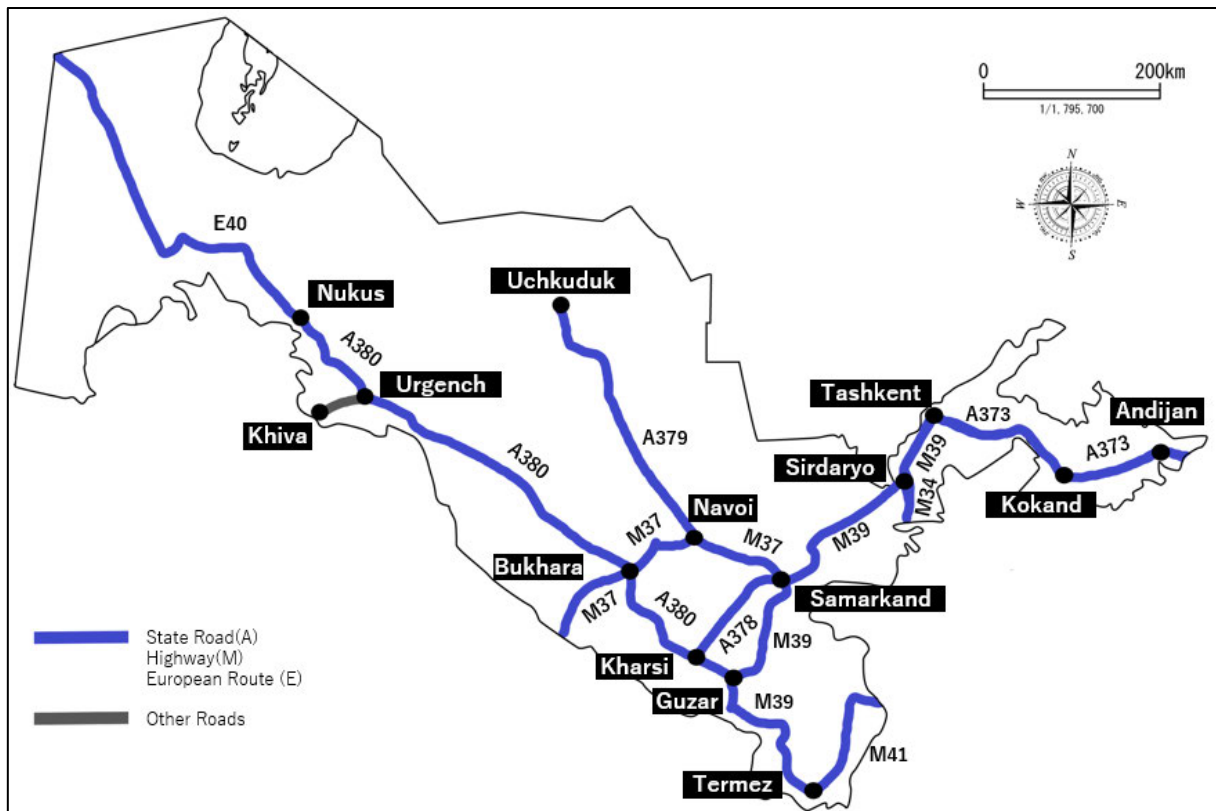
On the other hand, the number of railway and air flights is insufficient for tourists' transport demand. As for a route between Tashkent and Samarkand, which tourists and business travelers use, it was already difficult to book air flights and high-speed railways in 2019 before COVID-19.

In the short term, along with shortening the travel time of tourists by repairing roads and facilitating cross-border transport, it is expected to increase transport supply by reviewing schedules, including the increase of flight and railway services, and to improve the connection between international and domestic flights, and among transportation modes. In addition, measures for insufficient toilets when traveling long distances by cars and buses are already major challenges, and efforts to improve the

convenience and comfort of tourists are necessary.

### 6.2.1. Road

Figure 6.4 shows a road network in Uzbekistan. Uzbekistan's major tourist destinations are accessible by roads, and there are highways between Tashkent and Samarkand. In particular, overseas tourists mainly travel between cities by rail and air, but roads are used as a transport mode that complements rail and air routes when the tourists cannot obtain tickets and cannot use rail and air.



Source: Drawn by the survey team regarding the International Travel Maps "Kazakhstan & Uzbekistan," Google Maps.

**Figure 6.4: Road network in Uzbekistan**

According to the MOTAS, the Green Corridors Project is currently underway to promote cross-border transport with Afghanistan and Kazakhstan.

A summary of the Green Corridors Project is provided below.

- Project to improve the efficiency of movement of people and cargos by establishing border facilities at the border between Uzbekistan and Afghanistan, Hairatan near Termez, and the border between Uzbekistan and Kazakhstan, Gisht-Kuprik.
- Started operation at Gisht-Kuprik in January 2021, though facilities have not been completed.
- There are plans to expand to other borders in the future.
- There are plans to operate buses between the borders to cities in Uzbekistan, too.



Table 6.5 lists other information obtained at interviews during the field survey. Although some road sections need repairs, such as the Road A380 from Bukhara to Urgench and Khiva in western Uzbekistan, there were many comments that road conditions have been significantly improved in recent years.

**Table 6.5: Information on roads obtained during the field survey (Uzbekistan)**

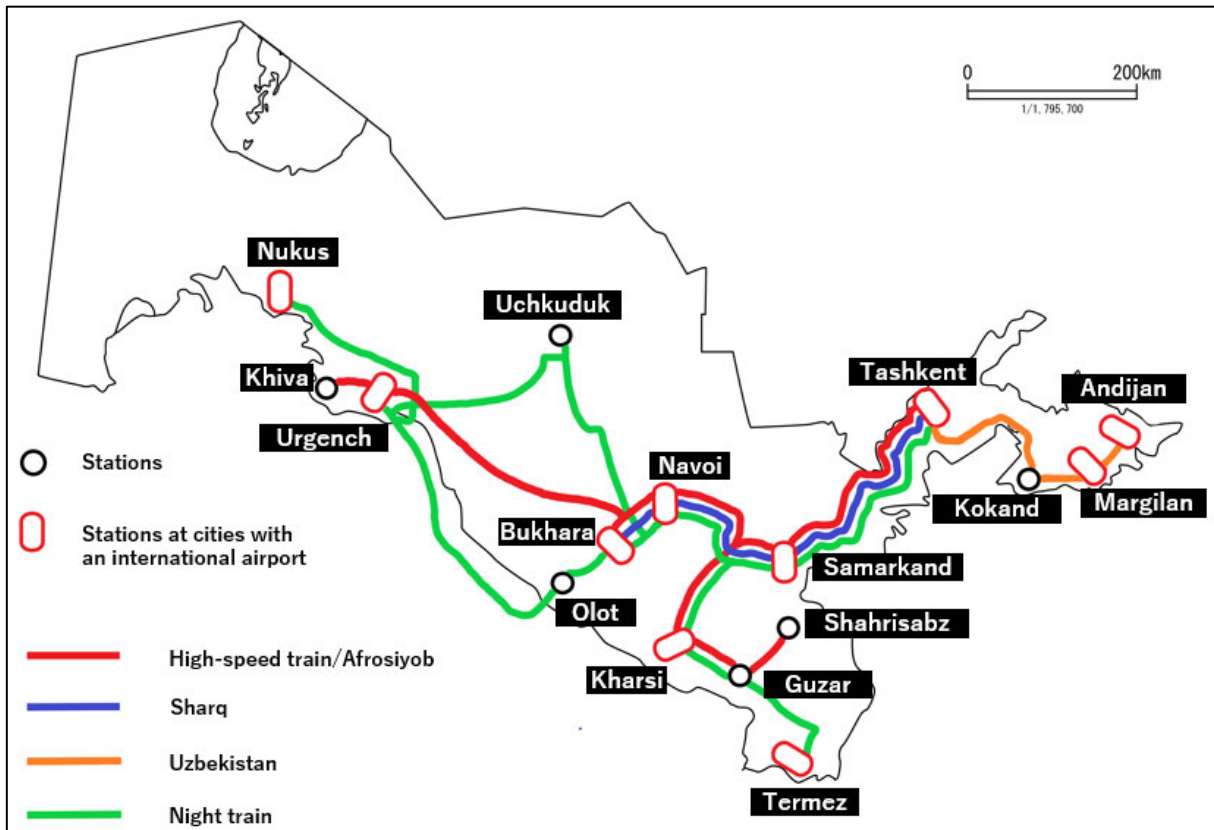
Category	Description	Source
Maintenance and rehabilitation	<ul style="list-style-type: none"> <li>- Roads have been improved in recent years.</li> <li>- Road conditions had been bad until around 2015. Even if a new road were constructed, a puddle would soon form.</li> <li>- Rehabilitation of road A380, from Bukhara to Urgench and Khiva, has not progressed. Overweight trucks and temperature differences between summer and winter damage road pavements.</li> <li>- The road A380 is a two-lane road on each side. Initially, it should be possible to travel 489 km in about 5 hours, but tourist buses take 8 to 9 hours.</li> <li>- There is also a section between Samarkand and Termez that needs repair.</li> <li>- Sections with inferior maintenance are (1) between Bukhara and Gazli, (2) between Berniy and Tortokul (Karakarapakstan), and (3) between Samarkand, Koshirabad, and Nurota.</li> </ul>	Travel companies, guide association
Transport network	<ul style="list-style-type: none"> <li>- Facilitating cross-border transport is one of the challenges to attracting tourists.</li> <li>- Borders between Uzbekistan and the Kyrgyz Republic, like Uzbekistan and Turkmenistan, have been improved. Still, it took time to cross borders between Kazakhstan and Uzbekistan before (the current situation is unknown).</li> </ul>	Travel companies, USAID
Tourist buses	<ul style="list-style-type: none"> <li>- Poor road pavement prolongs travel time by buses. The cost of gasoline and maintenance and bus drivers' salaries also increased, which led to the rise of tour prices.</li> <li>- When operating buses between cities, allocation of two drivers is required and take their places every three hours.</li> <li>- Buses that stop or park in front of architectural heritages are issues. The situation has not improved though requests are delivered to the city of Samarkand.</li> <li>- Although buses used to be the primary means of transport between Bukhara and Khiva, limited express trains have started operation (tentatively suspended now).</li> <li>- Large buses are imported from China and Dubai (Japanese vehicles are also imported through Dubai). Imports from Europe are more costly as they cross borders more often. Used cars are often imported from South Korea.</li> <li>- Drivers who have D-class licenses for large buses are recruited and trained by experienced drivers for half a year.</li> <li>- Parking facilities and spaces for tourist buses are insufficient in each tourist city. Large bus companies have their own parking spaces. Many buses are parked at roadsides to be washed. Buses are sometimes punctured by mischief, and parking space is a significant safety issue.</li> <li>- There are not enough bus maintenance facilities and driver rest areas.</li> </ul>	Travel companies
Traffic safety	<ul style="list-style-type: none"> <li>- There are not many traffic accidents due to the driving skills of tourist bus drivers or poor road surface, although tourist buses are sometimes involved in traffic accidents colliding with other cars.</li> <li>- Bus drivers have a high social status, and the reputation by tourists for their outfits, work attitudes, and driving skills are high.</li> <li>- There are cases of travelers like backpackers who have traffic accidents while walking or using white taxis.</li> </ul>	Travel companies
Others	<ul style="list-style-type: none"> <li>- Receiving a proposal by the Minister of Transport, a transport working group was established on June 9, 2021, to develop a roadmap towards the future. Members include the Deputy Minister of Transport, the President of the APTA Association, representatives of the Uzbekistan Airport Company, Uzbekistan Airways, the Uzbekistan Railways, and the road association.</li> <li>- Imported cars were double the price until 2013 regardless of buses. In response to a shortage of tourist buses, the Ministry of Transport deducted tax on large buses with 30 or more seats in 2013 and expanded to minivans in 2017. After August 2020, different tax rates were applied depending on engine size, etc., and distribution of new cars or used cars for up to 3 years has increased.</li> </ul>	Travel companies and tourism associations

Source: Survey team

### 6.2.2. Railway

Figure 6.5 shows a railway network in Uzbekistan. Domestic railway lines are operated by state-owned

Uzbek Railways, connecting important tourist destinations. There are also international trains from Tashkent to Almaty and Shymkent in Kazakhstan three days a week and Moscow in Russia one day a week.



Source: Drawn by the survey team regarding the Advantour website ([https://www.advantour.com/jp/uzbekistan/uzbekistan\\_railways.htm](https://www.advantour.com/jp/uzbekistan/uzbekistan_railways.htm)), Globe-Trotter Travel Guidebook - Plat Uzbekistan, Gakken Plus, 2019

**Figure 6.5: Railway network (Uzbekistan)**

According to MOTAS, the Tourism Railways Project, which Uzbekistan and Kazakhstan have approved, is being promoted.





The outline of the Tourism Railways Project is as follows.

- A high-speed rail project connects Turkistan and Shimkent in Kazakhstan to Tashkent Samarkand, Bukhara, and Khiva in Uzbekistan.
- End of a planning phase as of June 2021.
- It is financed by both the government of Uzbekistan and Kazakhstan.
- Railway track will be newly constructed from Bukhara to Khiva (expected to open in 2025).
- Railway tracks between Turkistan and Shimkent will also be newly constructed (Turkistan and Shimkent are historical heritage cities with a large population and many Uzbekistan people).

Table 6.6 lists passenger trains in Uzbekistan. The high-speed train, Afrosiyob, takes 2 hours 10 minutes and costs USD 9.39 from Tashkent to Samarkand. The number of passengers carried from Tashkent to Samarkand by Afrosiyob is 654 passengers per day, approximately 240,000 passengers per year

(calculated by 218 passengers per train and three trains per day). Sharq can carry 776 passengers per day and about 280,000 passengers per year (calculated by 388 passengers per train and two trains per day).

**Table 6.6: Passenger railways in Uzbekistan**

Train	Overview	
Afrosiyob		<p>A high-speed railway made in Spain runs at 210 km/h. All vehicles are air-conditioned, non-smoking, and operate daily on the following routes:</p> <ul style="list-style-type: none"> <li>- Tashkent-Samarkand-Bukhara</li> <li>- Tashkent-Samarqand-Shahrisabz</li> </ul> <p>There are three trains a day between Tashkent and Samarkand (345 km), which takes 2 hours and 10 minutes, and between Tashkent and Bukhara (610 km), which takes 3 hours 20 minutes.</p> <p>[Vehicle]</p> <ul style="list-style-type: none"> <li>- 218 seats per train</li> <li>- VIP: 2 cars, 11 seats each</li> <li>- Business: 2 cars, 26 seats each</li> <li>- Economy: 4 cars, 36 seats each</li> <li>- One dining car</li> </ul>
Sharq		<p>The maximum speed is 140 km/h, connecting Tashkent, Samarkand, and Bukhara in 6 hours and 30 minutes (2 trains a day between Tashkent and Samarkand, which takes about 3 hours 15 minutes). There are night trains on Fridays and Saturdays.</p> <p>[Vehicles]</p> <ul style="list-style-type: none"> <li>- Bed (Spalniy Vagon, SV): 1 car, 2 beds, 9 rooms</li> <li>- First-class: 3 cars, 36 seats each</li> <li>- Second class: 5 cars, 56 seats each</li> <li>- One dining car</li> </ul>
Uzbekistan		<p>The maximum speed is 120 km/h. Trains connect Tashkent and the Fergana Valley, stopping at Kokand, Margilan, and Andijan. It takes about 5 hours and 45 minutes between Tashkent and Andijan and operates once a day.</p>
Night trains		<p>The maximum speed is 90 km/h and connects Tashkent, Bukhara, Termez, Urgench, and Nukus. Trains stop at Samarkand, Kharsi, Navoi, etc.</p>

Source: Advantour Website ([https://www.advantour.com/jp/uzbekistan/uzbekistan\\_railways.htm](https://www.advantour.com/jp/uzbekistan/uzbekistan_railways.htm))

Table 6.7 describes information obtained through interviews and observations during the field survey. According to the Tourism Department in Samarkand Region, tourists have skyrocketed in the past few years until 2019, reaching 3.2 million domestic and international tourists. It seems that group reservations are prioritized, and in 2019 it was tough to reserve train tickets between Tashkent and Samarkand. Tickets can be purchased on the Uzbek Railways website<sup>1</sup>.

**Table 6.7: Information on railways obtained from the field survey (Uzbekistan)**

Category	Description	Source
Ticket	<ul style="list-style-type: none"> <li>- The difficulty of purchasing train tickets during a high season is a huge issue. When it was difficult to book high-speed train tickets in 2019, a ticket counter dedicated to travel agencies were set up, and some agencies could purchase tickets as requested.</li> <li>- Group reservations are prioritized, and it is difficult for an individual to book tickets.</li> <li>- If tickets cannot be purchased, tourists use tourist buses between Tashkent and Samarkand and airplanes between Tashkent and Bukhara.</li> <li>- There is no online system for group reservation, and tickets can only be purchased at</li> </ul>	Tourism associations, travel companies, USAID

<sup>1</sup> <https://e-ticket.railway.uz/lang-en/index.html>

Category	Description	Source
	station counters.	
Number of trains and vehicles	<ul style="list-style-type: none"> <li>- Afrosiyob can be used for international tourists, but Sharq and other trains cannot be used due to the low quality of service.</li> <li>- Limited express trains have begun to operate between Bukhara and Khiva though currently suspended. Buses were major transport modes until then.</li> <li>- The number of high-speed trains is insufficient. An increase in the number of trains or vehicles is expected.</li> <li>- The track is shared with freight trains, and it is challenging to construct a new track due to land problems.</li> <li>- An increase in number of vehicles and investment in new types of the high-speed train (USD 160 million) is expected. Support by CAREC would be possible.</li> </ul>	Travel companies, MIFT

Source: Survey team

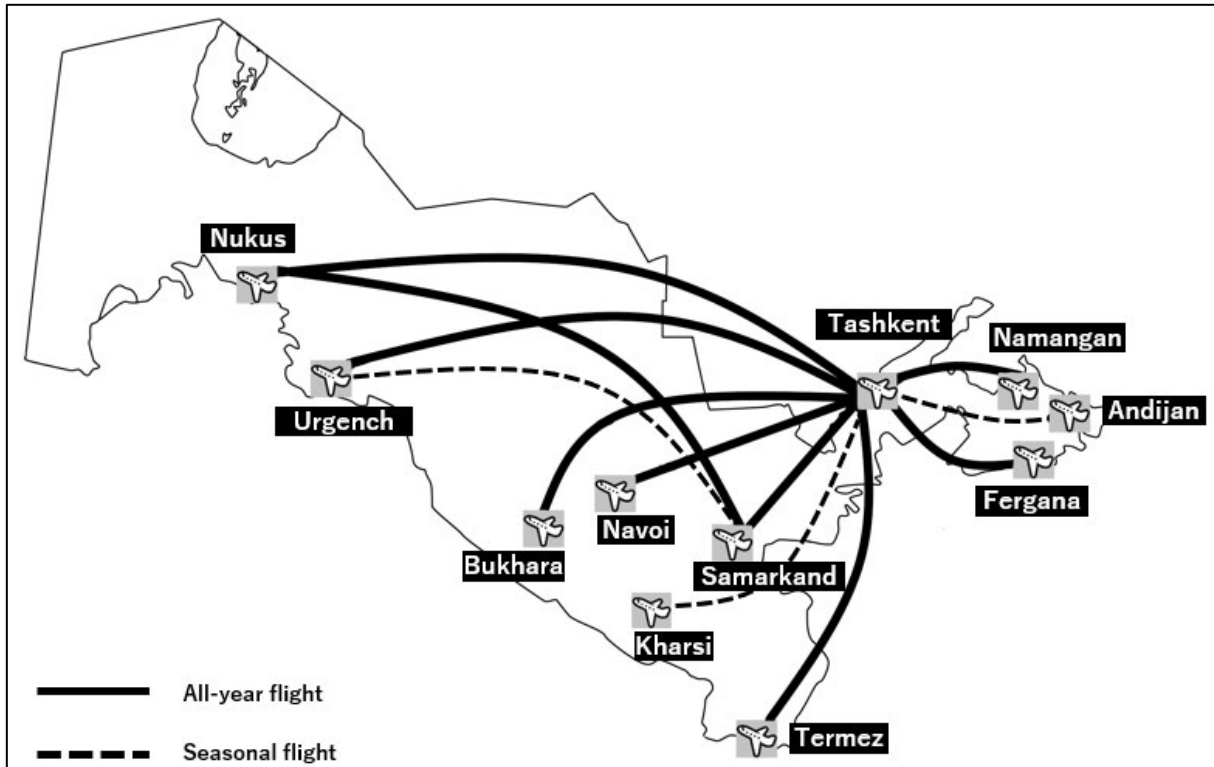
As shown in Table 6.6, Afrosiyob, with a capacity of 218 passengers per train, makes two round trips per day between Tashkent and Bukhara and one round trip per day between Tashkent and Shahrizabz<sup>2</sup>. Meanwhile, the number of hotel guests in Samarkand in 2019 was 268,000 (see Table 5.6), and the modal share of high-speed rail between Tashkent and Samarkand is set at 50% (the modal share of railways in the country as a whole is 43%). Therefore, the demand for high-speed rail from people staying in Samarkand can be estimated at 370 people per day. They account for 57% of the daily seats (654 seats) on the Tashkent-Samarkand route. This calculation is the demand of domestic and foreign tourists staying in hotels, and as mentioned above, the number of visitors to Samarkand in 2019 is 3.2 million.

In interviews with local travel companies, some suggested that the Afrosiyob should at least double its current service (six round trips per day between Tashkent and Samarkand). Under MOTAS's planned target of receiving 12 million visitors by 2025, a further increase in trains will be necessary. It will require an increase in the number of trains from the current four, improvement and expansion in signaling and vehicle evacuation facilities, and an increase in vehicle service personnel.

### 6.2.3. Aviation

Figure 6.6 shows a domestic airline network in Uzbekistan. In addition to routes connecting Tashkent and each city, there are routes between Samarkand and western Uzbekistan, such as Nukus and Khiva. Fares are reasonable and widely used by tourists. International airports are located in Tashkent, Samarkand, Bukhara, Urgench, etc.

<sup>2</sup> The high-speed train runs between Tashkent and Karshi, with a transfer between Karshi and Shahrizabz.



Source: Drawn by the survey team regarding the Uzbekistan Airways website (<https://www.uzairways.com/en>), Globe-Trotter Travel Guidebook - Plat Uzbekistan, Gakken Plus, 2019

**Figure 6.6: Domestic airline network in Uzbekistan**

There are direct flights to and from overseas cities, as shown in Table 6.8. Before COVID-19, there were direct flights between Narita and Tashkent except in winters. However, flights are not being operated as of November 2021.

**Table 6.8: Major overseas cities with direct flights to Uzbekistan**

Region	City
Central Asia	Nursultan, Almaty, Bishkek, Dushanbe, Ashgabat
East and Southeast Asia	Seoul, Beijing, Bangkok, Singapore, Kuala Lumpur
Russia	Moscow, St. Petersburg
Middle East	Istanbul, Dubai, Tel Aviv
Europe and America	London, Frankfurt

Source: Compiled by the survey team from Uzbekistan Airways' website

Travel time and airfares of domestic routes are listed in Table 6.9. It takes 55 minutes between Tashkent and Samarkand and costs USD 40 for one way.

**Table 6.9: Travel time and fare for each route (Uzbekistan)**

Route	Travel time	Airfare of Economy Class
Tashkent-Samarkand	55 minutes	USD40.60
Tashkent-Bukhara	70 minutes.	USD46.60
Tashkent - Nukus	100 minutes.	USD75.60
Tashkent - Urgench (Khiva)	90 minutes	USD75.60
Tashkent - Fergana	50 minutes.	USD41.60
Tashkent-Termez	80 minutes.	USD66.60
Samarkand - Urgench (Khiva)	75 minutes.	USD63.60

Source: Compiled by the survey team from the Uzbekistan Airways website (<https://www.uzairways.com/en>; checked on August 10, 2021).

Table 6.10 describes some information obtained through the field survey and interviews.

**Table 6.10: Information on aviation obtained from the field survey in Uzbekistan**

Category	Description	Source
Charter flights	<ul style="list-style-type: none"> <li>- There was a plan to enter LCC business in Kharsi, Kashkadarya province. However, the project was aborted due to COVID-19.</li> <li>- There was also a plan to operate a charter flight from Tashkent to Issyk-Kul Lake in the Kyrgyz Republic, but it has not been realized due to the pandemic.</li> <li>- There aren't any flights from Ashgabat, Turkmenistan, to Uzbekistan. There are flights from Kazakhstan, Kyrgyz Republic, and Tajikistan to Uzbekistan.</li> <li>- Before COVID-19, there were about 40 charter flights a year from Japan to Samarkand.</li> </ul>	Nagoya University Uzbekistan Office, Travel companies, Tourism Department of Samarkand Region, USAID
Convenience	<ul style="list-style-type: none"> <li>- The number of flights is small, and it is crowded.</li> <li>- During the high season, it is difficult to book tickets not only for trains but also for domestic flights.</li> <li>- Flights are often canceled even if tickets have been arranged in advance.</li> <li>- Connecting flights between international and domestic are not convenient even if both flights are Uzbek Airways. International flights arriving in Tashkent are sometimes delayed, and passengers cannot transfer to domestic flights to Urgench.</li> </ul>	Travel companies, USAID
Others	<ul style="list-style-type: none"> <li>- There is a plan to develop Samarkand as a tourism hub, and there are 210 investment projects. Renovation of the Samarkand International Airport is included.</li> <li>- Due to a monopolistic market by Uzbek Airways, competitiveness is low. However, improvements can be seen, such as the introduction of baggage-free airfares.</li> </ul>	Tourism Department in Samarkand Region, USAID

Source: Survey team

Table 6.11 summarizes the time required to travel between Tashkent and Samarkand by tourist buses, buses, railways, and airlines. In interviews with travel agencies, the following information was collected.

- Although tourists can travel by high-speed trains in 2 hours and 10 minutes, there is no significant difference between tourist buses and trains considering waiting time at the stations as well as boarding and alighting time.
- When traveling by trains, suitcases are separately carried by buses, increasing the cost of using trains. About USD 125 will be added for transportation between hotels and stations and carrying bags (about USD 5 per person for 25 people per group).
- Frequencies of flights and trains are minor, and there is no competition between transport modes, including buses. If train tickets are available, tourists tend to use a train, but tourists tend to use buses if tickets are not available.
- In Uzbekistan, there is no special fare for travel agencies. Fares are the same for both group and individual tourists.

**Table 6.11: Travel time and fare for traveling between Tashkent and Samarkand**

Mode of transport	Travel time	Fare
Tourist bus	3 hours 30 minutes to 4 hours	USD8.00
Train (Afrosiyob)	2 hours 10 minutes	USD9.39
Airplane	55 minutes	USD40.60

Note: Tourist bus costs USD200 in total if it accommodates 25 tourists as a group

Source: Interviews with tour companies; websites of the Uzbek Airways and Uzbekistan Railways

#### 6.2.4. Other Infrastructure

The Department of Tourism and Sports Infrastructure of MOTAS, responsible for the maintenance of roads, water, sewage, drainage, Wi-Fi, information centers, and signage in tourist areas, has identified 300 tourist and archaeological sites in each region and is promoting a project to improve electricity,

water, and other facilities. This project has a budget of 1 trillion UZS and will last for two years.

Table 6.12 summarized other information obtained through interviews and observations in the field survey. Based on the information and current situation, the following points are expected to be improved.

- Comfort when traveling by cars or buses for a long time (development of toilets and rest areas)
- Central heating systems at hotels.
- Condition of communication around tourist facilities in tourist cities.
- Pedestrian traffic safety in cities.

**Table 6.12: Information on other infrastructure obtained during the field survey (Uzbekistan)**


Category	Description	Source
Toilets, rest areas	<ul style="list-style-type: none"> <li>- Gas stations, toilets, and roadside rest areas are insufficient, and there are problems with toilets during long travel. There is only one toilet for 3-hour travel by car, which is inconvenient for tourists.</li> <li>- The highway between Tashkent and Samarkand has no rest facility or toilet.</li> <li>- Tourists use toilets at gas stations, but gas stations are closed in winter, and tourists cannot use toilets.</li> </ul>	Travel companies
Water/ electricity/ heating equipment	<ul style="list-style-type: none"> <li>- Many hotels do not open in winter because they do not have central heating in regions or the cost of heating is expensive.</li> <li>- Roads and airports in Tashkent have been improved significantly in recent years. The number of cases of power shortages and water outages has decreased. Local governments are expected to secure a stable water and electricity supply. Compared to Tashkent and Samarkand, water quality in Khiva is still poor.</li> </ul>	Travel companies
Communication	<ul style="list-style-type: none"> <li>- In Samarkand, there are areas even in the city where network conditions are unstable.</li> <li>- There are cases where the internet is not available in or around tourist facilities.</li> </ul>	Onsite observation
Traffic safety	<ul style="list-style-type: none"> <li>- In Tashkent and around tourist facilities, there were cases of a narrow sidewalk, short green signal for pedestrian crosswalks, and insufficient width and space of center dividers.</li> </ul>	Onsite observation




Source: Prepared by the survey team based on the results of the field survey

A taxi dispatch service, Yandex Go, is available in Uzbekistan. Although searching in English is sometimes inconvenient, tourists can travel between tourist sites in Tashkent only for USD 1 or 2.

In interviews with travel companies, many voices expect improvements in toilets when traveling by cars or buses for a long time. The use of simple toilets on such tourist routes is conceivable, and Table 6.13 shows some examples in that case. Currently, travel companies are taking measures such as using tourist buses with toilets or carrying portable toilets by cars.

**Table 6.13: Examples of simple toilets**

Category	Name	Description	Examples
Portable toilet	 <p>Ho! Toilet/ Excelsior Inc.*1</p>	<ul style="list-style-type: none"> <li>- Portable toilets using tablet-type chemicals that can be used in disasters, mountain climbing, and sightseeing spots</li> <li>- By the action of lime, which is the main component of the drug, germs in stool are sterilized, malodorous components are also decomposed and adsorbed, and unpleasant stool odor is eliminated.</li> <li>- Contains items necessary for excretion, such as assembled toilets, medicines, tissues, plastic bags, ponchos, etc., and can be carried anywhere</li> <li>- Can be disposed of as combustible waste</li> <li>- Price: About 300 yen per sheet</li> </ul>	<ul style="list-style-type: none"> <li>- Mt Fuji</li> <li>- Norikura Highland</li> <li>- Lake Titicaca, Peru</li> </ul> <p>Widespread use on mountain trails and in mountain huts in Japan</p>

	<p>Portable toilet 2</p>  <p>ECO Sanita-clean Toilet Treatment Bags/ Sogo Service Corporation *2</p>	<ul style="list-style-type: none"> <li>- Portable toilet with high-speed water supply coagulation sheet adhesively integrated</li> <li>- It can be used by covering it on the toilet seat of a style toilet or a simple toilet and can be used as a container by unfolding and folding it outdoors.</li> <li>- Even in a harsh environment, the bag has a double structure that wraps the water absorption sheet, so it is hard to tear, and there is no problem of odor with a completely sealed, highly sealed zipper bag.</li> <li>- Can be disposed of as combustible waste</li> <li>- Price: About 300 yen per sheet</li> </ul>	<ul style="list-style-type: none"> <li>- Southern Alpine National Park</li> <li>- Mt. Hayachine</li> <li>- Yakushima Island</li> </ul> <p>The Ministry of the Environment has concluded an official partnership for national parks, and it has become popular in national parks all over Japan.</p>
<p>Temporary toilet</p>	<p>Chemical treatment toilet</p>  <p>Mt. Fuji Toilet/ Excelsior Inc.*1</p>	<ul style="list-style-type: none"> <li>- A system that deodorizes, disinfects, and solidifies excrement into a jelly with a special excrement treatment agent</li> <li>- No electricity or installation work is required. It can be moved like a temporary toilet and can be installed anywhere</li> <li>- Since the excrement solidifies without a foul odor, it can be transported without using a vacuum car in the event of a disaster.</li> </ul>	<ul style="list-style-type: none"> <li>- Mongolia</li> <li>- Yoyogi Park</li> <li>- Norikura Kogen</li> </ul> <p>Demonstrations have been conducted at events in Japan and overseas, and the system is used in mountain areas.</p>
	<p>Bio-degradable toilet</p>  <p>Biomicaret/ Mikasa*3</p>	<ul style="list-style-type: none"> <li>- Toilet that decomposes excrement by the action of bio (microorganisms) does not require water or pumping work and has a less foul odor</li> <li>- No sewerage equipment or septic tank is required, and since it is a stationary installation type, no major construction work is needed, and it can be installed only with a power supply.</li> <li>- Maintenance is only general toilet cleaning, checking the condition of cedar chips in the processing tank, and replacing once every two to three years.</li> <li>- Processing capacity: 30 to 70 times/day</li> <li>- Price: 2.4 million yen to 3.5 million yen</li> </ul>	<ul style="list-style-type: none"> <li>- Mt Fuji</li> <li>- Showa Station, Antarctica (lease)</li> <li>- Gokase Ski Resort</li> </ul> <p>There are examples of use in mountain trails, parks, construction sites, golf courses, etc.</p>

Source: \*1 Excelsior Inc. website (<https://excelsior-inc.com/products/hotilet.html>), \*2 Sougou Service Corporation website (<https://sservice.co.jp/outdoor/>), \*3 Mikasa website (<https://mikalet.jp/service/biomikalet/>)

### 6.3. Kyrgyz Republic

In the interviews with concerned parties in the Kyrgyz Republic, they highly evaluated tourism infrastructure in the Kyrgyz Republic in general. However, they expected road disaster prevention measures against landslides and rockfalls, installation of road signs around tourist sites and facilities, and development of bicycle roads for cycling such as bicycle lanes. On the other hand, both the public and private sectors recognize sewage treatment and waste treatment issues and show strong intention to work in these fields.

#### 6.3.1. Road & railway

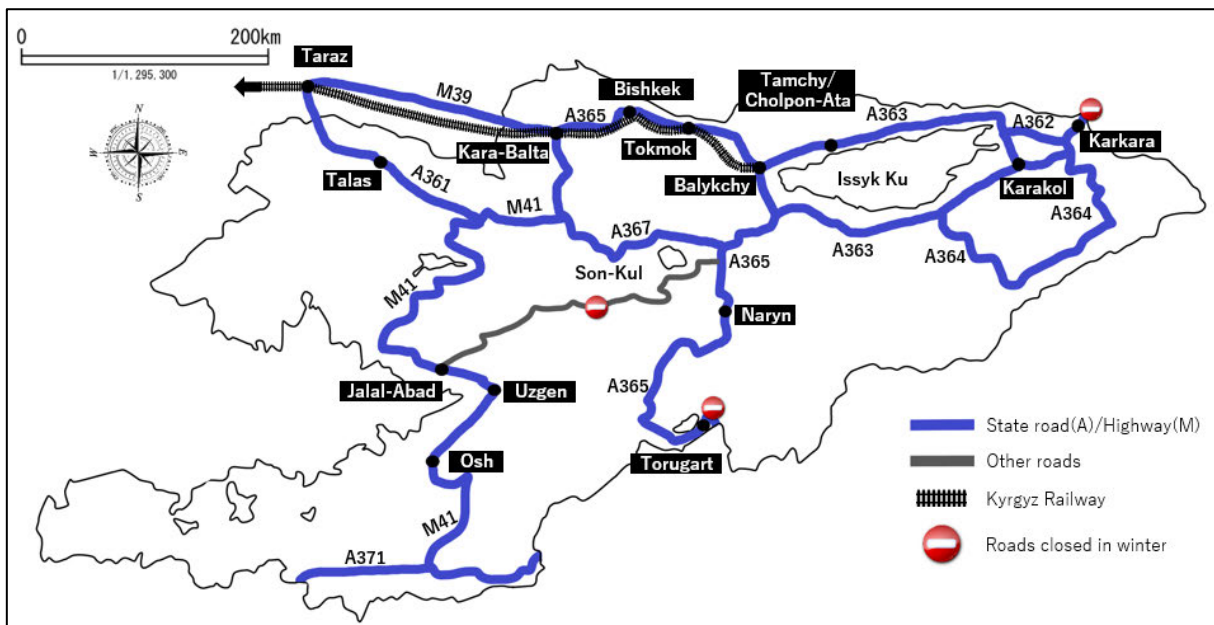
Figure 6.7 shows road and rail networks in the Kyrgyz Republic. The road network has been developed and connects major tourist destinations, including a two-lane bypass from Bishkek to Issyk-Kul Lake. The main road around the Issyk-Kul Lake is comfortable to drive, and tourists can enjoy the scenery along the roads. Similar to Uzbekistan, taxi dispatch applications (such as Yandex Go) are also available in Kyrgyzstan.



On the other hand, road disaster prevention measures against landslides and fallen stones continue to be necessary for the north-south road connecting Bishkek and Osh and at the Bohm Valley from Bishkek to the Issyk-Kul Lake. Some sections are impassable in winter due to snow, such as the road from the Song Kol Lake to Jalal-Abad and the Torugart Pass, which borders China.

Road disaster prevention in the Kyrgyz Republic and the situation of the Bishkek-Osh Road are described in detail in the report of the "Feasibility Survey for Slope Disaster Prevention on Road in the Kyrgyz Republic" conducted by JICA in 2018<sup>3</sup>. At the Bohm Valley, rockfall countermeasures were implemented during the field survey in July 2021.

As for railways in the Kyrgyz Republic, there are one or two trains a day from Bishkek to Balykchy at the western end of the Issyk-Kul Lake. It takes 5 hours with 180 km/h and costs around USD 3. Only a few tourists use the train because it takes 2 hours to 2 hours and 30 minutes to travel by car. In addition, international trains operate between Bishkek and Moscow.



Source: Drawn by the survey team regarding the Google Maps, the Ministry of Land, Infrastructure, Transport and Tourism's Asia Highway website (<https://www.mlit.go.jp/sogoseisaku/inter/kokusai/AH2005>), etc.

**Figure 6.7: Road and rail network in Kyrgyzstan**

Table 6.14 summarizes information from interviews and observations through the field survey in July. As mentioned above, the survey team received opinions that expect the installation of road signs around tourist sites and facilities, the development of bicycle lanes for cycling, etc. Several projects have been implemented with assistance provided by KOIKA and USAID regarding road signs.

<sup>3</sup> The Final Report of the Feasibility Survey for Slope Disaster Prevention on Road in the Kyrgyz Republic, SANGO HOLAIDO Co., Ltd. and JICA, 2018 ([https://openjicareport.jica.go.jp/pdf/12306361\\_01.pdf](https://openjicareport.jica.go.jp/pdf/12306361_01.pdf))

**Table 6.14: Information on roads and railways obtained during the field survey in Kyrgyzstan**

Category	Description	Source
Network	<ul style="list-style-type: none"> <li>- The Almaty-Bishkek Economic Corridor project has plans to improve existing roads and develop new routes from Almaty in Kazakhstan to the Issyk Kul Lake (under the jurisdiction of the Ministry of Transport and Communications).</li> <li>- There is a two-lane bypass from Bishkek to Issyk Kul, with a legal speed of 90 km/h.</li> <li>- Many tourists travel between Bishkek and Osh by air, but tourists from Europe relatively tend to join jeep tours and nature tours and use the north-south road.</li> <li>- Since some tourists are cycling, it would be good to improve narrow roads and develop bicycle lanes.</li> </ul>	Tourism Department, Tourism association
Maintenance, management, and restoration/ road disaster prevention	<ul style="list-style-type: none"> <li>- Road themselves are not bad.</li> <li>- Expect the government to repair roads and bridges before the tourist season.</li> <li>- Road disaster prevention is still an important measure, such as measures against landslides and falling rocks on the north-south road that connects Bishkek and Osh. The Baume Valley (under construction to prevent rockfall as of July 2021) on the route from Bishkek to the Issyk Kul Lake and the Ala-Archa National Natural Park in the southern part Bishkek also need road disaster prevention measures. The Ministry of Transport is responsible for road disaster prevention.</li> <li>- In particular, the north-south road crosses two 3,000-meter-class mountain ranges. It becomes a heavy snowfall area in winter, and disasters are caused.</li> </ul>	Tourism Department, Tourism association, private companies
Road sign	<ul style="list-style-type: none"> <li>- In particular, road signs around tourist facilities are expected to be developed.</li> <li>- With the assistance of KOICA, approximately 20 road signs have been set up to guide major tourist facilities. Activities are conducted in coordination with the Ministry of Transport in charge of national roads. There are both cases of newly installing at points where there are no signs and revising guidance information of existing signs.</li> <li>- Approximately 200 road signs were installed with the support of USAID. In addition, with the support of ACTED, signs for historical and cultural heritages are being placed.</li> </ul>	Tourism department
Long-distance buses, share tax	<ul style="list-style-type: none"> <li>- There are frequent international and minibuses from Almaty, Taraz, and Shimkent in Kazakhstan.</li> <li>- As for domestic buses, there are routes from Karakol, Cholpon-Ata, etc. There are also routes of shared taxes from Osh. Shared taxes cost about USD 4 for four passengers.</li> <li>- There are long-distance buses from Bishkek to Talas in Kyrgyzstan via Taraz in Kazakhstan and from Bishkek to Karakol via Issyk-Kul, but those are not for general tourists.</li> <li>- It takes 8 to 9 hours by night buses for 400 km from Bishkek to Karakol, and its fare is KGS 365 (about USD 4.3). The seating capacity is 50, and no air conditioning.</li> <li>- It takes about 4 hours from Bishkek to Cholpon-Ata, and its fare is KGS 280 (approximately USD 3.3).</li> <li>- Tourists from Israel, Arab, Germany, and Italy often travel with a few rental cars. Usually, the vehicle driven by Kyrgyz people leads the rest of the vehicle driven by tourists themselves.</li> </ul>	Travel companies
Tourist buses	<ul style="list-style-type: none"> <li>- Laws, regulations, and standards for tourist buses are not in place.</li> <li>- Space for tourist buses to be parked and maintained is insufficient. There are only two places in Bishkek where buses can be parked. One of them is inconvenient because it is far from tourist facilities.</li> <li>- In the 1990s, German used buses were imported from the former Soviet Union countries, but new Chinese vehicles are recently procured due to requests from tourists from Asia.</li> <li>- Major bus routes are from Bishkek to Issyk Kul, Naryn Region when the border with China is open, and Almaty in Kazakhstan.</li> <li>- Buses are also used for domestic group tourists. There are many routes from Bishkek to Issyk Kul, Almaty, and Tashkent.</li> <li>- There is a corruption issue at borders with Kazakhstan, where buses are frequently stopped, and bribes are required.</li> </ul>	Travel companies

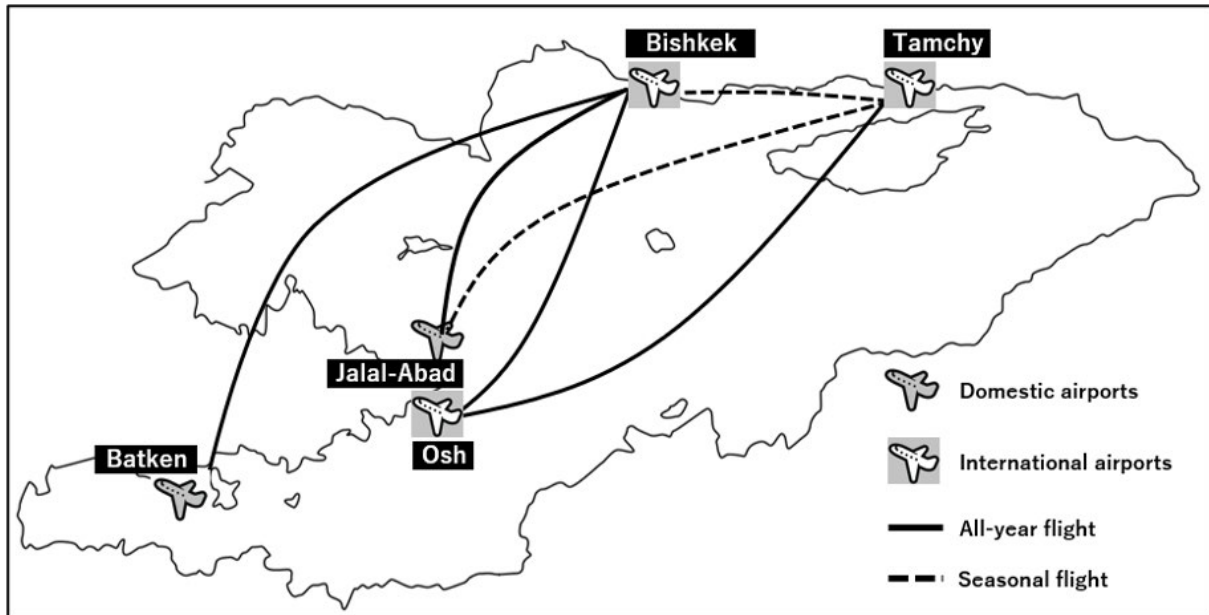
Source: Prepared by the survey team based on the field survey

### 6.3.2. Aviation

Figure 6.8 shows a domestic aviation network in the Kyrgyz Republic. The main airports in the country are the Manas International Airport in Bishkek and the Osh International Airport, and others major airports are in Tamchy, Jalal-Abad, and Batken. Tourists do not usually use the airports in Jalal-Abad and Batken. Naryn and Talas also have airports, but they have not been used since the 1990s.

International flights connect with Kazakhstan, Tashkent in Uzbekistan, and Dushanbe in Tajikistan in Central Asia. As for international flights from outside Central Asia are direct flights to and from Istanbul, Urumqi, Moscow, Delhi, and Dubai. Many tourists enter Osh for climbing mountains from Istanbul, Urumqi, and Russia without going through Bishkek. There is also a direct flight to Tamchy from Moscow.

There are daily flights between Bishkek and Osh which take 40 minutes, while it takes 11 hours by car. Flights between Bishkek and Tamchy operate only during the tourist season.



Source: Drawn by the survey team regarding the Tez Jet Airlines website (<http://tezjet.kg/schedule.html>), etc.

**Figure 6.8: Domestic airline network in Kyrgyzstan**

Table 6.15 shows information obtained through interviews during the field survey.

**Table 6.15: Information on aviation obtained during the field survey (Kyrgyzstan)**

Category	Description	Source
Usage situation by tourists	<ul style="list-style-type: none"> <li>- In addition to the Manas Airport in Bishkek, Osh Airport, and Issyk Kul Airport, there are not many mountain tourists who depart and return to Almaty.</li> <li>- Almaty is closer to Khan Tengri than Bishkek, and some tourist access to base camps at Khan Tengri from Almaty.</li> <li>- In recent years, the southern part of the Kyrgyz Republic has become popular, and more tourists visit Osh, Jalal-Abad, Uzgen, etc. Japanese tourists fly from Bishkek to Osh to travel around for a day, where European tourists take a few days.</li> </ul>	Travel companies
Route, network	<ul style="list-style-type: none"> <li>- LCC may start operating international flights.</li> <li>- Although the government had launched a direct flight between Bishkek and Seoul, its operation continued only for half a year because of insufficient attraction of tourists. (Uzbekistan succeeded in establishing direct flights to Thailand and Malaysia by promoting FAM trips.)</li> <li>- Launched charter flights between Tashkent and Issyk-Kul with the support of USAID.</li> </ul>	Tourism Department, Tourism association, USAID
Operation	<ul style="list-style-type: none"> <li>- There are only four airlines that operate in Kyrgyzstan.</li> <li>- Expect operational improvements for current issues that immigration control takes long due to insufficient airport staff, visa issuance windows sometimes close, and electronic visas cannot be easily obtained.</li> <li>- The Manas International Airport in Bishkek is state-owned with 95% national capital. There is a plan to receive assistance from an international organization and outsource the operation. A feasibility study is currently underway, and bidding documents are being prepared to select an operator.</li> </ul>	Tourism association

Source: Prepared by the survey team based on the field survey

### 6.3.3. Other Infrastructure

Table 6.16 shows other information on tourism infrastructure obtained through interviews and observations during the field survey. Many similar opinions were raised by a wide range of stakeholders about sewage treatment and waste treatment in addition to roadside toilets, which might be a matter to be noted. The establishment of roadside rest areas, including toilets, is being promoted with the support of many development partners.

**Table 6.16: Information on other infrastructures obtained from the field survey (Kyrgyzstan)**

Category	Description	Source
Sewage treatment	<ul style="list-style-type: none"> <li>- Sewage treatment facilities are generally insufficient in the Kyrgyz Republic. The city government is responsible for such facilities.</li> <li>- In Issyk Kul, some sanatoriums and resorts drain sewage into lakes without treatment. Bishkek and Naryn also have issues with sewage treatment and drinking water.</li> <li>- In some cases, local governments operate sewage treatment facilities, and in other cases, the private sector develops its treatment facilities. Different resort facilities sometimes share treatment facilities.</li> <li>- With assistance from ADB and EBRD, there are plans to develop new sewage treatment facilities in Karakol, Cholpon-Ata, and Balykchy.</li> <li>- At the Yurt camp at the Song Kol Lake, sewage is stored in underground tanks. They are taken to a nearby Actorer's sewage treatment facility twice a season. The cost is USD 700 each time.</li> <li>- Base camp at Karakol has a large tent, where a treatment facility was built three years ago with the support of the Balykchy sewage treatment facility. This system treats sewage on the site and flushes it into the water.</li> <li>- At the Song Kol Lake, there is a five-year contract with the local government land-use rights. Discussion with the local government about constructing a sewage treatment facility is expected at the next contract renewal. Currently using an existing technology of the Kyrgyz Republic, expect technology that meets international standards.</li> </ul>	Issyk-Kul State Government, Kyrgyz CBT Association
Waste disposal	<ul style="list-style-type: none"> <li>- Waste disposal is becoming an issue in the Kyrgyz Republic. Expect governments to construct a waste recycling factory.</li> <li>- As some areas do not have a waste dump site, recycling factories, recycling campaigns, and dissemination on waste separation are expected.</li> <li>- There are several dump sites around Issyk Kul, but garbage sometimes flows into the lake.</li> <li>- A trekking association collects garbage after the tourist season. The association would like to include its cost in tour prices, but it has not been realized due to price competition.</li> <li>- The CBT Karakol has three environmental protection efforts: 1) picking up garbage before the season, 2) educating guides on the proper garbage disposal, and 3) holding seminars to raise awareness of garbage issues (using environmentally friendly materials such as building materials, tableware, and furniture when constructing guest houses).</li> <li>- In the Kyrgyz Republic, some vendors buy iron, plastic, and glass and sell them to China.</li> <li>- It is also a problem that garbage is not separated, which leads to air pollution and harms the environment.</li> <li>- At a meeting of the Shanghai Cooperation Organization, the Tourism Bureau proposed the construction of a waste recycling plant.</li> </ul>	Trekking Association, Kyrgyz Association of Tour Operators, Kyrgyz CBT Association
Toilet	<ul style="list-style-type: none"> <li>- It is necessary to install and maintain handrails, benches, trash cans, toilets, and drinking fountains on hiking routes.</li> <li>- Toilets are meager standard and are not available for aged foreign tourists. Therefore, some travel agencies have buses with toilets and include those costs in tour prices.</li> <li>- Although there are clean toilets at gas stations and cafeterias on the way to Issyk Kul Lake, the number of bathrooms is not enough.</li> <li>- Experts are expected to teach how to develop public toilets and maintain them. JICA was requested to dispatch an expert who surveyed roadside toilets between Bishkek and Issyk Kul.</li> <li>- In Japan, governments have budgets for maintaining public toilets. It was asked to Kyrgyz government to secure budgets, but it has not been realized.</li> <li>- Tourists have expressed their voices regarding the construction of new toilets and the improvement of existing bathrooms, and the Tourism Bureau would like to make efforts. Installation of toilets in tourist information centers is in progress.</li> </ul>	Travel companies, Tourism Department
Tourism information	<ul style="list-style-type: none"> <li>- A CAREC project sets up five information centers in Issyk Kul. It is planned to establish</li> </ul>	Tourism

Category	Description	Source
center	<ul style="list-style-type: none"> <li>two more information centers if the budget allows.</li> <li>- A World Bank project is developing five camping centers, including restaurants, toilets, and souvenir shops. It is planned to expand to other areas if these activities go well.</li> <li>- A HELVETAS project also develops roadside infrastructure such as establishing a coffee shop.</li> <li>- Along with the direction of the Ministry of Economy, the Tourism Bureau evaluates roadside. The Tourism Bureau has recently checked toilets, bus stops, and rest areas on the bypass from Bishkek and Issyk Kul. Subject areas change every year.</li> </ul>	Department
Others	<ul style="list-style-type: none"> <li>- Although basic infrastructures such as roads and electricity have been developed, improvement of water and sewage is expected.</li> <li>- Green technology is necessary to provide adequate service for tourists preserving the natural environment. Specifically, renewable energy, environmentally friendly sewage treatment facilities, waste treatment measures, etc.</li> <li>- Power outage, including rolling blackout, is also an issue. Improvement of traffic signals in the city is expected (traffic signals are not well controlled, which is one of the causes of traffic congestion).</li> </ul>	Tour companies, Department of Tourism

Source: Prepared by the survey team based on the field survey

In interviews with concerned parties in the tourism sector in the Kyrgyz Republic, the survey team found a high level of awareness of issues regarding sewage treatment and expectations for the development of sewage treatment facilities in the future. Table 6.17 lists some examples of sewage treatment systems.

**Table 6.17: Examples of sewage treatment systems**

Category	Outline	Characteristic	Examples of introduction
Sewerage	<ul style="list-style-type: none"> <li>- Establish a sewer network in a target area and collect domestic wastewater from thousands to hundreds of thousands of people in one place for collective treatment.</li> <li>- Versatile facilities for sewage treatment, flood prevention, sludge treatment, etc.</li> </ul>	<ul style="list-style-type: none"> <li>- Suitable for a wide variety of wastewater generation areas, including urban and factory areas.</li> <li>- Maintenance requires a great deal of cost and long-term construction.</li> </ul>	<ul style="list-style-type: none"> <li>- Lake Toya</li> <li>- Lake Suwa</li> <li>- Fuji Hokuroku Area</li> </ul>
The decentralized domestic wastewater treatment system	<ul style="list-style-type: none"> <li>- Facilities for sewage treatment only.</li> <li>- A decentralized domestic wastewater treatment facility that can treat domestic wastewater on a building-by-building basis</li> <li>- Utilize the ability of microorganisms to decompose pollutants (Japan's unique dispersed sewage treatment technology).</li> </ul>	<ul style="list-style-type: none"> <li>- Suitable for areas with sparsely populated houses and ineffective collective processing.</li> <li>- High processing capacity and can be installed in a short period (construction takes about one week).</li> <li>- It is necessary to regularly clean and inspect the septic tank and replace the body and blower.</li> </ul>	<ul style="list-style-type: none"> <li>- Urabandai Lake Group (nitrogen and phosphorus removal type septic tank)</li> <li>- Sagami Lake (advanced treatment septic tank)</li> <li>- Lake Tajiri</li> </ul>
Septic tank	<ul style="list-style-type: none"> <li>- One of the distributed sewage treatment technologies, widely used in developing countries.</li> <li>- A simple treatment device with only an anaerobic tank, with precipitation separation (precipitating solid matter and flowing supernatant) and anaerobic treatment.</li> </ul>	<ul style="list-style-type: none"> <li>- Maintenance frequency is relatively low (once every 3-5 years), and the life of the main body is as long as 20-40 years, depending on the type of septic tank and maintenance method.</li> <li>- Low processing performance compared to septic tanks.</li> <li>- It is challenging to ensure hygienic treatment due to the structure with maintenance problems.</li> </ul>	<ul style="list-style-type: none"> <li>- Lakes, marshes, and wetlands in Cambodia (Phnom Penh)</li> <li>- Lakeside resorts in the United States (Michigan, etc.)</li> </ul>

Source: Compiled by the survey team based on the Ministry of the Environment Website (<https://www.env.go.jp/recycle/jokaso/index.html>), National Institute for Environmental Studies Web site



## 7. Marketing and promotion

Chapter 7 describes marketing and promotion efforts in Central Asian at regional and country levels.

### 7.1. Central Asia

While the need for marketing and promotion through cooperation among multiple countries has been recognized by both the public and private sectors, external regional cooperation organizations have led most of the efforts. However, in recent years, Uzbekistan has shown a move to lead the way in collaborative promotion by five countries.

#### 7.1.1. National PR Center of Uzbekistan

In Uzbekistan, the Marketing Department of the MOTAS is responsible for planning the overall marketing activities, and the National PR Center is in charge of its implementation. During the hearing at the PR Center, the survey team heard that the center was preparing a website to promote the five Central Asian countries coordinated by Uzbekistan. The development of the website is a President's initiative, and each country is providing tourism information, but Uzbekistan is bearing the cost<sup>1</sup>. There was also a plan to participate in travel exhibitions with the neighboring countries but not realized due to COVID-19.

These efforts will be a touchstone for future regional cooperation in Central Asia in tourism, and their future progress should be closely watched.

#### 7.1.2. CAREC

In the "Promoting Regional Tourism Cooperation under CAREC 2030: A Scoping Study" conducted before the CAREC Tourism Strategy 2030, CAREC made policy recommendations to promote cooperation among member countries in the tourism sector. The policy recommendations are divided into six categories, including marketing and promotion. The following three policies are listed as marketing and promotion policies:

- Establish a CAREC virtual tourism support database to strengthen tourism statistics collection and share market knowledge.
- Create destination image and a subregional brand under the overall Silk Road region marketing umbrella.
- Strengthen collaboration with the UNWTO's Silk Road Programme and UNESCO. This collaboration will also include a UNESCO-supported market study of World Heritage sites and natural and cultural heritage to create an image and brand for the destination.

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<sup>1</sup> When the survey team interviewed the Deputy Director of the Department of Tourism (DOT) of the Ministry of Economy and Finance of the Kyrgyz Republic, she was not aware of this initiative.

CAREC emphasizes cooperation with international organizations and making the most of the Silk Road image in Central Asia's marketing and promotional activities.

### **7.1.3. Shanghai Cooperation Organization (SCO)**

The Shanghai Cooperation Organization (SCO) is a multilateral cooperation organization established in 2001, with eight member countries: China, Russia, Kazakhstan, Kyrgyzstan, Tajikistan, Uzbekistan, India, and Pakistan. Its activities include national security, economic cooperation, and cultural exchange, and it is also involved in a variety of activities in the field of tourism. Most recently, in July 2021, a meeting of the heads of tourism administration of the SCO member countries was held in Dushanbe, the capital of Tajikistan, and the member countries signed a joint action plan for the tourism sector in the post-COVID-19 era from 2022 to 2023.

In terms of marketing and promotion activities, an online seminar on tourism promotion among SCO member countries took place in May 2021. The "Eight Wonders of SCO<sup>2</sup>" were selected to get into the news.

### **7.1.4. Turku Council**

The Turkic Council is an international organization established in 2009 by the nations whose official language is Turkic, with five member countries: Azerbaijan, Kazakhstan, the Kyrgyz Republic, Turkey, and Uzbekistan. One of the ten areas of cooperation (e.g., political cooperation, education, youth & sports) is tourism. Most recently, the 6<sup>th</sup> tourism ministers' meeting was held in June 2021 in Kokand, Uzbekistan, where new directions of cooperation were presented, including digitalization in the tourism sector and promotion of pilgrimage tourism.

The Silk Road has been brought to the forefront in marketing and promotion. For example, in 2018, the promotion of historical and cultural heritage by four countries other than Uzbekistan was launched under the Modern Silk Road Joint Tour Package. In addition, at the above-mentioned meeting of tourism ministers, it was agreed to launch a project called Turkic World Tourism Capital. One city from among the member countries will be selected as Turkic World Tourism Capital, and it will be promoted intensively until the following tourism ministers' meeting. Kokand was chosen as the first Turkic World Tourism Capital. The Turkic Council emphasizes attracting tourists from outside the member countries and promoting tourism.

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<sup>2</sup> The eight wonders of SCO consist of Daming Palace in China, Golden Ring Cities of Russia, Tamgaly Gorge in Kazakhstan, Lake Issyk-Kul in Kyrgyzstan, Navruz Palace in Tajikistan, Po-I-Kalan Complex in Uzbekistan, Statue of Unity in India, and Mughal Heritage in Pakistan.



## 7.2. Uzbekistan

This section looks at the status of the marketing and promotion of Uzbekistan, including its target market and promotion methods.

### 7.2.1. Target markets

Based on the geographic criteria among the market segmentation criteria, the target markets in Uzbekistan can be broadly classified into five categories, as shown in Table 7.1. This section discusses the characteristics of each market.

**Table 7.1: Target markets of Uzbekistan**

Target markets	Overview
Market in neighboring countries	Weekend trips by younger people from Kazakhstan, vacations or weekend trips from Russia, and medical trips from Afghanistan. The importance has increased since the COVID-19 pandemic.
Islamic market	The Marketing Department of MOTAS attaches importance to Malaysia and Indonesia.
West European market	The length of stay is long, and there is a tendency to travel around multiple countries.
Japanese market	The length of stay is short, and it is challenging to make repeat customers.
Domestic market	With the 2018 presidential decision, domestic tourism has been revitalized, and since the COVID-19 pandemic, group tourism has increased due to government promotion measures.

Source: Survey team

#### Market in neighboring countries

The market for neighboring countries includes five countries that share borders: Afghanistan, Kazakhstan, Kyrgyzstan, Tajikistan, and Turkmenistan, as well as CIS countries. Since the COVID-19 pandemic, these nations have become increasingly crucial as tourists from Western Europe and elsewhere in the long haul have declined. Given its geographical and linguistic proximity, neighboring countries are seen as the first to recover after COVID-19.

Specific examples include youth weekend trips from Kazakhstan, vacations and weekend trips from Russia, and medical trips from Afghanistan. As for relations with Kazakhstan, there is a plan to access high-speed railways between Turkistan and Simkent in the southern part of the country and Tashkent. Since cities in south Kazakhstan are closer to Tashkent than the country's capital, Nur-Sultan City and Almaty City, tourists' mutual visits are expected. Some Russians visit Uzbekistan on weekends for culinary purposes because Russia is close both culturally and geographically. There is a strong demand for a waterfront environment in Uzbekistan, which is warmer than Russia. The development of resorts in Lake Chalvak in the suburbs of Tashkent is targeted not only at domestic customers but also at Russians. In addition, Uzbekistan's medical services are cheaper than neighboring countries, so the number of tourists coming to Telmez for therapeutic purposes from Afghanistan, where a low level of medical care is provided, is increasing year by year. There are special visa measures for tourists for therapeutic purposes, and the ease with which they can visit by land is considered a factor rather than going to Dubai and other Gulf countries. Furthermore, there are Kyrgyzstan, Kazakhstan, and Tajikistan

visitors for dental treatment<sup>3</sup>.

### Islamic market

The basin of the Zarafshan River, where Bukhara and Samarkand are located, is one of the first regions in Central Asia that has become Islamic and has contributed significantly to the development of Islam by producing numerous Islamic scholars. In particular, Hadith (Prophet Mohammed's record of speech) compiled by ninth-century Islamic scholar Imam Ali Buhari, born in Bukhara, has carefully selected genuine Hadith without any doubts about the route of the route folklore. Among the Sunni Muslims, it is considered the second-largest value after Koran, and it has been the source of principles for many years<sup>4</sup>. Considering the spread of Muslims in Southeast Asia with the Hadith, the population's size, and the economic level, Uzbekistan sees Malaysia and Indonesia as essential markets. The Imam Ali Buhari Mausoleum on the outskirts of Samarkand has become a significant destination for pilgrimage tourism. The number of tourists visiting Uzbekistan on the way to Mecca from Southeast Asia to Hajj (holy ground pilgrimage) and visiting only Uzbekistan as a "small Hajj" is expected to increase.

Malaysia and Indonesia are two of the seven countries<sup>5</sup> in which Uzbekistan recognized visa exemptions for the first time and the CIS countries under the February 2018 Presidential Decree (No. 5326). Malaysia and Indonesia were chosen as visa-exempt countries despite the small number of visitors to Uzbekistan in 2017 (2,936 and one, respectively<sup>6</sup>) for the following reasons: (1) their "good inter-state relations with Uzbekistan, (2) their secure position in the global tourism market, and (3) the assessment that the entry of their nationals would not threaten Uzbekistan's security<sup>7</sup>.

### Western European market

Table 7.2 shows the top five tourist arrivals from Western Europe in 2019, according to UNWTO data. All countries became eligible for sightseeing visa exemptions from 2018 to 2019, and the number of tourists increased significantly from the previous year.

**Table 7.2: Top 5 countries for visitor arrivals to Uzbekistan from Western Europe (2019)**

Countries	Visitor arrivals (persons)	Share in the total visitor arrivals (%)	When visa exemption became in effect	Increase rate since 2018 (%)
Germany	27,625	0.41	January 2019	53
France	20,390	0.30	October 2018	50
Italy	20,356	0.30	February 2019	47
United Kingdom	15,962	0.24		100
Spain	12,191	0.18		61

Source: World Tourism Organization (2020), Yearbook of Tourism Statistics dataset [Electronic], UNWTO, Madrid.

<sup>3</sup> According to USAID officials, the cost of dental treatment in Uzbekistan is about one-tenth of that in Afghanistan.

<sup>4</sup> Hisao Komatsu (2018) '23 Islam, Uzbekistan', '60 Chapters for Knowing Uzbekistan', Akashi Shoten, pp. 160-164

<sup>5</sup> The five countries other than Malaysia and Indonesia are Japan, the Republic of Korea, Singapore, Turkey, and Israel.

<sup>6</sup> World Tourism Organization (2020), Yearbook of Tourism Statistics dataset [Electronic], UNWTO, Madrid

<sup>7</sup> Chiho Miyazaki, Elmurodov Eldorjon (2019), "Promotion of Reform by Replacement of President of Tourism Strategy in the Republic of Uzbekistan and Its Historical Background (1991-2019)," Paper on Japan International Tourism Society (No. 26), pp. 67-77

According to a survey conducted in 2018 by the State Committee for Tourism Development (now MOTAS) in Uzbekistan, the following points are listed as characteristics of tourists from Europe<sup>89</sup>:

- The majority (43% of respondents) is 55 years of age or older,
- The majority (43%) of people stay in Uzbekistan for more than nine nights,
- Many people travel in the group (78%),
- Many people use package tours (39%),
- A large number of tourists visited only Uzbekistan (48%), and
- Many people purchase tours from tour operators in Uzbekistan (35%).

In addition, local tour operators suggested that tourists from Western Europe had a high need not only for sightseeing of historical and cultural heritage sites but also for combinations with experiential tourism, such as staying in Yurt camps, cooking, and traditional crafts. For example, it is preferred to combine Yurt accommodation while traveling from Samarkand to Bukhara to experience starry sky appreciation and camel riding.

### Japanese market

Japan became a country subject to sightseeing visa exemption in February 2018 at the same time as Malaysia and Indonesia mentioned above. As with the two countries, visa-exemptions were granted to Japan despite a small number of 4,039 tourists arriving from Japan in 2017<sup>10</sup>. Uzbekistan government has gained confidence that Japan meets the following three conditions: "The extent of development of mutual relations with the Republic of Uzbekistan, the global tourism market situation analysis, and the situation that has been built in the target and regional security areas<sup>11</sup>." With visa exemptions, as with other visa-exempt countries, in 2018, the number of tourists was 17,052, and in 2019 it was 24,944, which grew sixfold in just two years<sup>12</sup>.

The Japanese market grew because of visa exemptions, increased media exposure, and Uzbekistan Airlines (HY) charter flights. HY's charter flights were inspired by the Japan Association of Travel Agents (JATA) visiting Uzbekistan in 2015 when Prime Minister Shinzo Abe visited Central Asia and signed a memorandum of understanding with state-owned Uzbek tourism (now MOTAS). It operated four roundtrips in 2016, 10 roundtrips in 2017, and 11 roundtrips in 2018. In 2017, package tours were set up for six nights and eight days using flights between Narita, Chubu, Kansai, or Fukuoka and Tashkent or Samarkand. Some tours incorporated ethnic dance concerts, fashion shows for ethnic

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<sup>8</sup> The survey categorizes respondents' countries of origin as "Central Asia and CIS," "Asia Pacific region," "Europe," "Middle East," "North America," "Australia and Oceania," and "Europe" does not necessarily indicate Western European countries.

<sup>9</sup> The State Committee of the Republic of Uzbekistan for Tourism Development (2018). "White Paper on Tourism 2018"

<sup>10</sup> World Tourism Organization (2020), Yearbook of Tourism Statistics dataset [Electronic], UNWTO, Madrid

<sup>11</sup> Miyazaki and Elmrodv (2019)

<sup>12</sup> World Tourism Organization (2020), Yearbook of Tourism Statistics dataset [Electronic], UNWTO, Madrid

costumes, 3D projection mapping at Registan Square in Samarkand, and visits to Bukhara, Hiva, and Urgench<sup>13</sup>.

In media-related fields, the number of Japanese people interested in Uzbekistan increased because of the broadcasting of two TV programs <sup>14</sup>15," and the movie "To the Ends of the Earth"<sup>16</sup>. In particular, Deputy Prime Minister and Minister of Tourism and Sports Abdukhakimov, who has experience studying in Japan, appeared on the two TV programs mentioned above and served as a guide in Japanese. In interviews with a Japanese travel agency, there was a comment that the number of young women who signed up for tours to Uzbekistan was temporarily increased immediately after the broadcasting of the TV program mentioned above.

The characteristic of Japanese tourists is that they stay for a short period, and they concentrate on the golden route, five days of trips around three cities, Tashkent, Samarkand, and Bukhara, or eight-day trips around four cities, including Khiva. The number of tourists visiting Uzbekistan increased with the sense of "an Islamic country to visit following Turkey," but according to travel agencies in Japan, the repeat rate is low. The challenge is whether Uzbekistan can become a "country that one wants to visit again and again" from a "country worth visiting once."

### Domestic market

In February 2018, when the visa exemption for tourism to seven countries was announced, the Presidential Decision No. 3514, "Measures for Accelerated Development of Domestic Tourism" was issued. The promotion of tourism was not limited to the inbound tourism. Domestic tourism was also promoted at the same time. As part of this effort, a special holiday was set in September 2018, and the number of Uzbek tourists increased. The climate of Uzbekistan is continental, hot in summer and cold in winter. The summer and winter seasons would be off-season if the country is oriented toward inbound tourism. Therefore, domestic tourism promotion is considered a "breakthrough to stabilize the regional economy through year-round tourism"<sup>17</sup>. It also aims to recognize history and the integration of the people by "informing the citizens of the nation's historical and cultural heritage and rich nature"<sup>18</sup>.

After the COVID-19 pandemic, domestic group travel has increased due to the government's domestic travel promotion measures. Specifically, it encourages employee trips for up to three days and

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<sup>13</sup> Travel Vision "JTBS, etc., Charter to Uzbekistan this year again, 9 flights from 4 cities" [https://www.travelvision.jp/news/detail/news-77235\(2021 on August 15\)](https://www.travelvision.jp/news/detail/news-77235(2021 on August 15))

Travel vision "Uzbekistan Airlines will continue charter flights this year, and 9 travel companies will sell tours" Visit August 15, [https://www.travelvision.jp/news/detail/news-81366\(2021\)](https://www.travelvision.jp/news/detail/news-81366(2021))

<sup>14</sup> Broadcasting on May 13, 2018

<sup>15</sup> Broadcast on June 15, 2019

<sup>16</sup> A movie directed by Kiyoshi KUROSAWA and starring Atsuko MAEDA. Released on June 14, 2019. Filming was held in Samarkand, Tashkent, Lake Aydarkul, etc.

<sup>17</sup> Miyazaki and Elmrodv (2019)

<sup>18</sup> Ditto.

educational trips for students. There is also a tax incentive from the government to tour operators. Those who mainly deal with inbound tourists are now tiding over an emergency by dealing with domestic travel.

### **7.2.2. Marketing and promotion entities**

The actors of promotions are divided into the government and private sector, and their respective activities are examined.

#### Marketing Department of MOTAS

The Marketing Department is in charge of attracting foreign tourists and promoting Uzbekistan's tourism overseas and works in cooperation with the Ministry of Foreign Affairs (including embassies in each country) and local governments. Under the umbrella of MOTAS's Marketing Department, the National PR Centre participates in travel exhibitions, attracts foreign tourists, invites foreign media, and prepares promotional materials in cooperation with the department. Specifically, when exhibiting at overseas travel exhibitions, the Marketing Department is in charge of overall coordination and planning, and the PR Center serves as an execution unit. FAM trips and media tours are also implemented with similar roles. The Marketing Department analyzes the effects and utilizes the result for future marketing. According to the general manager of the marketing department, the PR Center is responsible only for the "D" of the promotion PDCA (Plan, Do, Check, and Action) cycle. At the same time, the other activities are handled by the department.

Article 8 of the Tourism Law stipulates the authorized state body in tourism, and one of its functions is the "Implementation of Marketing Surveys in the Tourism Services Market." Specific activities include interviews with tourists and online questionnaires. The department also gets information from NGOs such as the Association of Private Tourism Agencies (APTA) and various websites about the characteristics of foreign tourists, tastes, duration of their stays in Uzbekistan, and amount of spending. In addition, it is also investigating what kind of search foreign nationals have conducted on Uzbekistan on the search site.

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<sup>19</sup> In 2018, a questionnaire survey targeting foreign tourists (5,756 respondents) was conducted jointly with the State Committee on Statistics with the advice of UNWTO experts, and the results are summarized in White Paper on Tourism 2018.

In addition, the department handles comments and complaints from the private sector, such as the Association of Hoteliers, and hosts a Telegram<sup>20</sup> group to listen to them.

### National PR Center

The National PR Center was established as part of the State Committee for Tourism Development at that time under the presidential decree of February 2018, "Regarding Additional and Organizational Measures for Establishing the Most Favorable Conditions for the Development of Tourism Potential in the Republic of Uzbekistan." Its initial mission was to "Promote Tourism Potential of Uzbekistan," but now that the Commission has been reorganized as MOTAS, the center promotes tourism and sports.

Uzbekistan has a tourism development fund financed by taxes collected from tourists, and 20% of the fund covers the expenses of the PR Center. In 2020, due to the impact of COVID-19, its financial resources were reduced, and the PR Center was downsized.

There are themes for the promotion every year, and the articles in 2021 include pilgrimage tourism, ecotourism, and outdoor activity. The theme for 2022 is skiing, and the center will prepare promotional materials for ski resorts, which will be used to promote countries interested in skiing.

The PR Center's activities can be divided into public relations (PR) and sales promotion among the four components of the promotion mix: advertising<sup>21</sup>, PR<sup>22</sup>, sales promotion<sup>23</sup>, and direct selling<sup>24</sup> (see Table 7.3).

**Table 7.3: PR Center's promotional activities**

Classification	Media	Overview
Public Relations	Website	<a href="https://uzbekistan.travel/en/">https://uzbekistan.travel/en/</a> Available in 20 languages. Emphasizes the diversity of tourism resources, including crafts, food, nature, and sports.
	Social media	Facebook, Instagram, Pinterest, Telegram, YouTube, and Twitter.
	Printed materials	Produced in 15 languages, but most of the printed materials are in English and Russian. Those contents are different for each language.
	FAM Tour and media Tour	Bloggers and journalists will be invited and encouraged to disseminate information about Uzbekistan.
Sales promotion	Travel exposition	The PR Center is exhibited in Western Europe (ITB in Berlin, WTM in London, FITUR in Madrid, etc.), Arabian Travel Market in Dubai, and Tourism Expo Japan in Japan.

Source: Survey team

<sup>20</sup> Instant-messaging application widely used in Russian speaking countries

<sup>21</sup> Paid promotion on the mass media and the Internet

<sup>22</sup> Dissemination of information from organizations without spending on advertising expenses

<sup>23</sup> Measures to scratch consumers' willingness to buy and dealers' willingness to sell

<sup>24</sup> Measures to promote sales through people



Printed materials created and supported by the PR Center

The Uzbekistan tourism website is operated by the PR Center and is available in 20 languages. It uses a great deal of photography and highlights the diversity of tourism resources, including "landmarks and attractions," "arts and culture," "food and drink," "wildlife tourism," "sports and leisure," and "beaches and coasts." In response to the COVID-19 epidemic, there is also information such as "online tours" and "Uzbekistan, Safe Travel Guaranteed<sup>25</sup>."

Regarding social media, the center uses Facebook, Instagram, Pinterest, Telegram, YouTube, and Twitter, but the first two are most frequently used. Facebook has about 36,000 followers, and posts are made in Russian every other day. Instagram has almost 21,000 followers and is posted in Russian and English about once a week. There are only 17 Pinterest followers. The number of YouTube channel subscribers is about 1,300, and although some videos have been played more than 10,000 times, most of them are played several thousand times. No tweets have been made on Twitter since May 5, 2021 (all figures as of August 2021).

Printed materials are in 15 languages, but the main languages are English and Russian. Languages are changed according to themes, such as Japanese and Korean for Buddhism, Arabic for Islam, and European languages for hiking and mountain climbing. Additionally, novelty goods such as T-shirts, caps, and ballpoint pens are also made and distributed along with printed materials through the Uzbekistan embassies in each country. However, since the COVID-19 pandemic, the number of promotional media has declined, so the contents published in printed materials are also posted on websites, and digital materials are newly prepared in eight languages.

In addition, foreign journalists and bloggers are invited to Uzbekistan for FAM tours and media tours to disseminate information about Uzbekistan. Bloggers' videos, which are believed to have been created through FAM tours, are also available on PR Center YouTube channels.

The tourism exhibitions include ITB Berlin in Berlin, World Travel Market (WTM) in London, Feria Internacional de Turismo (FITUR) in Madrid, Arabian Travel Market (ATM) in Dubai, and Japan's

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<sup>25</sup> Measures to oblige tourist businesses to implement measures against COVID-19 infectious diseases that are stipulated by MOTAS and the Ministry of Health and that conform to international standards

## Tourism EXPO Japan.

As described above, all promotional activities as a country of Uzbekistan are carried out by the PR Center. The PR Center understands the importance of outsourcing operations to private PR companies familiar with each market, as other government tourism agencies do. However, in Uzbekistan, the number of tourists has sharply increased after the relaxation of visa requirements, and the lack of infrastructure against this has become apparent. Therefore, the center believes that it is necessary first to develop the infrastructure and then work on branding and promotions.

As shown in Figure 7.1, the current Uzbekistan tourism logo only indicates the country name. The logo is a work chosen in a contest held in 2009 by the then state-run Uzbek tourism<sup>26</sup>. On the other hand, certain tourism slogans have not been used, and various slogans such as "Naturally Irresistible!", "Mysterious Uzbekistan," and "Symbol of the Magic East" have been used. Many private-sector interviewees stated that the country should create a unified slogan.



Source: Marco Polo Central Asia Travel

**Figure 7.1: Tourism logo of Uzbekistan**

### Private sector

In addition to the National PR Center exhibiting at travel expositions, private tour operators also show their own. In cooperation with tour operators in neighboring countries, they sometimes set up booths as "Central Asia." At the hearing, tour operators expressed dissatisfaction that the Georgian government supports private companies and has a fine booth at travel expositions. Still, the Uzbekistan government does not support the private sector. The PR Center does not provide any support for the exhibition of private companies, but it invites about ten exhibitors through the selection method. Based on the three criteria of (1) being a company representing Uzbekistan, (2) sales, and (3) quality of deliverables, companies are selected according to the number of years of business continuity and size. In addition, for tour operators to participate in overseas travel exhibitions, the focus is on meeting existing customers in the country once a year to deepen their relationships rather than developing new customers.

Within Uzbekistan, APTA also holds Travel Mart in Tashkent and Samarkand. It cooperates with MOTAS to help its members sell domestic and international tourist products.

After the COVID-19 pandemic, some companies have focused on online promotions. For example, a retail-only tour operator specializing in the Internet has a five-person team that operates and invests in

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<sup>26</sup> Aleksandra, K. (2013). Analysis and perspectives of tourism development in Uzbekistan. *Revista AGALI Journal*, n° 3, 87-101



its website. The company has been enhancing its websites in COVID-19, such as multilingualization.

### 7.3. Kyrgyz Republic

In terms of marketing and promotion for Kyrgyzstan, the current situation of the target market and advertising methods will be discussed.

#### 7.3.1. Target markets

As a result of the interviews with the Tourism Department and travel companies, the target market of Kyrgyzstan is roughly divided into five categories shown in Table 7.4 based on the geographical criteria of the market segmentation criteria.

**Table 7.4: Target markets of the Kyrgyz Republic**

Markets	Overview
Market in neighboring countries	Visit throughout the year, mainly at the resort on the northern coast of Issyk- Kul Lake. There are also visits for skiing purposes in winter.
European market	Kyrgyzstan is a yearning place for mountain climbing and trekking enthusiasts. Price competitiveness is also attractive.
Middle East market	They visit in search of mountains and water they do not have in their own country. There is also a connection with nomadic cultures, such as participation in the World Nomad Games.
Japanese market	They are specialized in niche markets with a clear sense of purpose (mountain climbing, trekking, nomadic culture, archaeology, etc.).
Domestic market	Consumption behavior is similar to that of tourists from neighboring countries.

Source: Prepared by the survey team

#### Market in neighboring countries

In terms of tourist arrivals in Kyrgyzstan in 2019, Uzbekistan (4,570,258, 54%), Kazakhstan (2,908,571, 34%), Russia (540,262, 6%), and Tajikistan (174,631, 2%) top the list with the share of the four countries accounting for 96%<sup>27</sup>.

Tourists visit spas and resorts in Issyk Kul (such as Cholpon Ata, Tanga, Jyrgalang, Jeti Oguz, and Altynarasan) throughout the year from the four countries mentioned above. Some tourists stay for therapeutic purposes because some resorts offer therapy with minerals or mud. Many tourists visit for skiing in winter. They often make reservations directly to their accommodations, and they rarely use tour operators within Kyrgyzstan.

#### European market

In the former Soviet Union, mountain climbers who climbed five 7,000 meter-class mountains in the country were given the title of 'snow leopard.' Three of the five mountains (the Lenin, Khan Tengri, and Poveda peaks) were located in Kyrgyzstan, raising the attention of mountain climbers from the former Soviet Union and overseas to Kyrgyzstan. Due to the high brand power of these three mountains, many

<sup>27</sup> World Tourism Organization (2020), Yearbook of Tourism Statistics dataset [Electronic], UNWTO, Madrid

tourists come from Europe for climbing and trekking purposes. In the World Economic Forum's Travel and Tourism Competitiveness Report, Kyrgyzstan ranks 110 out of 140 countries, but it ranks 9th in terms of price competitiveness<sup>28</sup>, a significant factor attracting tourists from Europe. Karakol's tour operators provided a two-night, three-day trekking tour Europeans with six staff members, including mountain guides, porters, and cooks, for USD 800 (including food and personnel costs) for a group of three. During the team's July 2021 visit, tourists from Europe began to return gradually, but the size of the group decreased. In addition, while climbing, trekking, and skiing are popular among enthusiasts, several interviewees pointed out problems with safety and guide quality.

In addition to the activities mentioned above, there is also a high need for experiential programs (falconry, home visits, etc.) where people can experience the culture of Kyrgyzstan, as well as tours combining visits to neighboring countries.

### Middle East market

The countries with the most significant number of tourists arriving in the Middle East are Turkey (57,326), Saudi Arabia (6,761), and Israel (3,834)<sup>29</sup>. Tourists from the Middle East visit Kyrgyzstan, searching for mountains and water unavailable in their own country. The same Muslim nation and its price competitiveness are also the reasons for visits. In addition, it has a high affinity with nomadic culture, and there is participation from the Middle East in the World Nomad Games, which has been held every other year since 2014. During the most recent 2018 tournament, Afghanistan, the United Arab Emirates (UAE), Israel, Iran, Kuwait, Saudi Arabia, Syria, Turkey, and Jordan took part, with 12 medals for Iran and two medals for the UAE. Following the success of the three games held in Kyrgyzstan, an exhibition of the World Nomad Games was held in Riyadh, Saudi Arabia, as part of Ar Rumahiyah King Abdul Aziz Camel Festival in March 2019. Officials of Kyrgyzstan, who were entrusted with the operation, brought yurt, animals, etc., and successfully organized the tournament, which impressed the richness of the nomadic culture of Kyrgyzstan and the high capacity to run the tournament. The fourth tournament was to be held in Turkey in 2020, but it was canceled due to the impact of COVID-19. In addition to attracting tourists, it can be said that the region is expected to be an export destination for the contents of the World Nomad Games.

### Japanese market

In 2019, the tourist arrivals from Japan were 5,068, which is less than that from China (33,348 people) and South Korea (16,034 people). However, it increased by 18.25% from 2018 to 2019, higher than

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<sup>28</sup> World Economic Forum (2019). The Travel & Tourism Competitiveness Report 2019

<sup>29</sup> World Tourism Organization (2020), Yearbook of Tourism Statistics dataset [Electronic], UNWTO, Madrid

China (8.45%) and Korea (11.43%)<sup>30</sup>.

There is no direct flight from Japan to Kyrgyzstan, and it is common to enter Almaty in Kazakhstan via Seoul and enter Kyrgyzstan by land. Via Istanbul, Tashkent, or Moscow, tourists can fly into Kyrgyzstan directly with a single transit, but the long flight distance and long transit time are the bottlenecks. In other words, it is challenging to target tourists unless they can secure a certain number of travel days and have a solid motivation to visit the country. On the other hand, it is an attractive destination for those with an apparent interest or a sense of purpose, such as mountain climbing and trekking, nomadic culture, and archaeology. For example, a group of five Japanese tourists, whom the study team met in Karakol, had a clear objective of collecting butterflies, so they boldly visited while meeting opposition from their families during the COVID-19 pandemic.

#### Domestic market

The "Kyrgyzstan Tourism Development Program 2019-2023" does not explicitly describe the promotion of domestic tourism. Still, the government emphasizes promoting domestic tourism in response to the decline in the number of inbound tourists due to the COVID-19 pandemic. Before COVID-19, for example, it was common for Bishkek citizens to go to Lake Issyk Kul on weekends for leisure with their families in the summer. On weekends, tours to Sary-Chelek Lake in the southern part of the country were sold at 4,400 soms (about 5,700 yen). Thus, the number of affordable tours available to the Kyrgyz public increases. On the northern coast of Issyk-Kul Lake, a Kyrgyz company is developing new markets by opening a coworking facility at a renovated Soviet-era resort.

### **7.3.2. Marketing and promotion entities**

In this section, the marketing and promotion activities in the Kyrgyz Republic will be reviewed separately for the state and private sectors.

#### Department of Tourism, Ministry of Economy and Finance

The Department of Tourism, Ministry of Economy and Finance (DOT) is responsible for promoting the Kyrgyz Republic. One of the monitoring indicators of the Kyrgyzstan Tourism Development Program 2019-2023 is the National Budget Expenditure for Advertising and Publicizing Kyrgyzstan as a Tourist Site Overseas. The government aims to increase the actual amount of 2018 from 7.8 million soms (about 10 million yen) to 122.6 million soms (about 150 million yen) in 2023. On the other hand, given that there are only nine DOT staff, it is difficult that DOT alone carries out sufficient activities.

As shown in Table 7.5, the main activities of DOT promotion are public relations and sales promotion.

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<sup>30</sup> World Tourism Organization (2020), Yearbook of Tourism Statistics dataset [Electronic], UNWTO, Madrid

**Table 7.5: DOT's promotional activities**

Classification	Media	Overview
Public relations activities	Website	<a href="http://www.discoverkyrgyzstan.org/">http://www.discoverkyrgyzstan.org/</a> Launched with the TIKa's support and it is available in six languages.
	Social media	Facebook, Twitter, YouTube, and Instagram.
	Printed material	DOT does not have its budget to print promotional materials, and it is produced in the development partner's project activities.
	FAM Tour	As well as printed materials, bloggers will be invited as part of the development partners' project activities to encourage the dissemination of information about the Kyrgyz Republic.
Sales promotion	travel exposition	Before COVID-19, DOT participated in IBT in Berlin, FITUR in Madrid, Kazakhstan International Exhibition "Tourism & Travel" (KITF) in Almaty, etc. In the absence of a DOT budget, participation is funded by development partners.

Source: Survey team

The website "Discover Kyrgyzstan"<sup>31</sup> for tourism promotion for Kyrgyzstan was established with the support of the Turkish Cooperation and Coordination Agency (TIKA, a Turkish ODA implementing agency). It supports six languages: Kyrgyz, Turkish, Russian, English, Arabic, and Chinese. Destinations are classified by region (Bishkek City and seven oblasts) and by type<sup>32</sup> and are introduced with many photographs.

In addition, DOT's PR website<sup>33</sup> launched with the support of the GIZ Project (Green Economy and Sustainable Development of the Private Sector in Kyrgyzstan) is available in three languages: Kyrgyz, Russian, and English. It is operated by DOT staff and introduces DOT activities and statistical information. The website also offers 3D virtual tours<sup>34</sup> produced with the support of JICA, GIZ, HELVETAS, and domestic private companies. In addition to the city of Bishkek and seven states, there is also a category of Winter Tourism. Users can freely move and enjoy 3D images of tourist sites.

Concerning social media, Kyrgyzstan utilizes Facebook (about 11,000 followers), Twitter (about 1,200 followers), YouTube (about 60 channel subscribers), and Instagram (nearly 10,000 followers), but it is hard to say that they are fully utilized. Even the most frequently posted Facebook and Instagram have not been posted since late June 2021 (as of August 2021). Facebook is in English only, and Instagram is posted in English and Russian.

DOT does not have its budget for printed materials, but it uses the project budget to prepare them as part of a development partner project. In terms of multilingualization, at least an English version is prepared.

The action plan includes "promoting tourism products in Kyrgyzstan in foreign markets through participating in the Travel Expo." Specifically, Berlin's ITB, Kazakhstan International Exhibition "Tourism & Travel" (KITF) in Almaty, Moscow's MITT, Novosibirsk's TourSib, Ekaterinburg's

<sup>31</sup> <http://www.discoverkyrgyzstan.org/>

<sup>32</sup> It is classified into eight categories: waters, ski resorts, cities/settlements, mountain/paths/valleys, nature reserves/national parks, historical/cultural sites, natural wonders, and UNESCO list.

<sup>33</sup> <https://tourism.gov.kg/>

<sup>34</sup> <http://map.tourism.gov.kg/>

EXPOTRAVEL, and Dubai's ATMs are listed. According to DOT, before COVID-19, it had participated in FITUR, ITB, KITF, and MITT. Since the COVID-19 outbreak, it has participated online in the Miami and Dubai tourism exhibitions, and for the Seoul International Tourism Exposition (SITF2021) in June 2021 sent only brochures to the venue. If available, DOT participates with the national budget but otherwise participates with development partners' budget.

As a country, the tourism logo shown in Figure 7.2 is used, but there are currently two slogans. "So Much to Discover" on the left is used for the tourism promotion website, and "Infinitely Unique" on the right is used for the DOT public relations website. The former was invented around 2014 by the then Director-General of the DOT, and the latter is a work of a junior high school student selected through public audition. According to DOT, none of them were officially approved. They want to think about a new slogan, but they are not working on it due to a budget shortage.



Source: <http://www.discoverkyrgyzstan.org/>

Source: <https://tourism.gov.kg/>

**Figure 7.2: Tourism logo and two slogans of the Kyrgyz Republic**

### Private sector

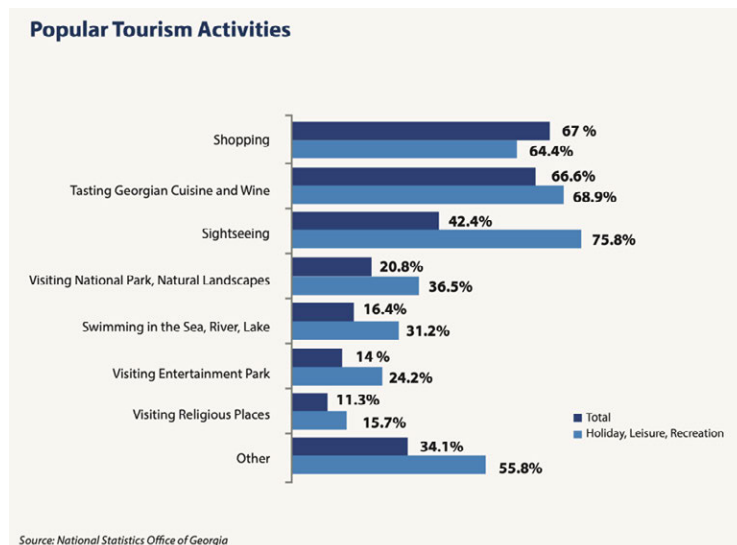
In addition to each company promoting its own business in the private sector, they are also engaged in promotional activities as an industry organization. For example, the Kyrgyz Association of Tour Operators (KATO), an industry group of tour operators, participates in the ITB in Berlin. However, support from the government is minimal, and participating companies bear the costs of airline tickets, hotel fees, and other expenses. It also engages in Almaty's KITF and Russian tourist exhibitions. KATO establishes booths at the tourist exhibitions (coordination with participating companies and ordering local vendors). Sometimes, a yurt for display is rented and brought to the venue, or a booth is set up in collaboration with Uzbek companies.

I AM NOMAD, an organization headed by the former Minister of Culture, Information, and Tourism, operates the World Nomad Games. It also conducts activities like a film commission, such as introducing the location of movies to inquiries from abroad.

### Gastronomic Tourism in Georgia

During the survey team's visit to Uzbekistan, many respondents mentioned Georgia's wine and food tourism as a notable example of tourism development in neighboring countries. The table below shows that Georgia had 390,000 international visitors and about \$130 million in global tourism revenue in 2000. Still, by 2019, international visitors had increased to 7.7 million and international tourism revenue to \$1.12 billion. This increase in international tourists and international tourism revenue was promoting tourism-related to wine and food, both of which are considered to have originated in Georgia.

International visitors are primarily from neighboring countries such as Azerbaijan, Russia, Armenia, and Turkey. However, unlike the five Central Asian countries, more visitors (42.7%) came for "Holiday, Leisure, Recreation" than for "Visiting Friends, Relatives" (20.3%), and among tourism activities, "Tasting Georgia Cuisine and Wine" is at the same level as shopping and visiting tourist attractions.



Source: Georgian Tourism in Figures 2018, Georgian National Tourism Administration

Georgia's tourism promotion agency, the Georgian National Tourism Administration (GNTA), actively promotes wine and food tourism. It produces wine and food brochures in different languages for European and Asian countries, as well as materials in English that introduce the main wineries in the country. The brochure includes information on the languages available at each winery, the number of tourist groups that allowed the availability of wine tastings, accommodation, and facilities for the disabled.

Like the cuisine of the five Central Asian countries, Georgian cuisine is influenced by West Asian, East Asian, Middle Eastern, and European influences. In Japan, a Japanese restaurant chain's adaptation of the Georgian dish "Shkumerli" became a hot topic, and it was expanded into retort dishes and cup noodles. The Caucasus region, including Georgia, has been a less familiar destination than Central Asia for Japanese people. Still, the fact that Georgian cuisine has become a topic of conversation in this way has provided an opportunity to introduce Georgia's wine culture and Georgia as a tourist destination<sup>35</sup>.

In September 2016, UNWTO's 1st UNWTO Global Conference on Wine Tourism was held in the Kakheti region of Georgia, where the Georgia Declaration on Wine Tourism on sustainable tourism development using intangible cultural heritage was adopted. Zurab Pololikashvili, who served as the Government's Minister of Economic Development (with jurisdiction over the GNTA) from 2008 to 2009, has since served as Georgia's representative to UNWTO and has been UNWTO's Executive Director since January 2018. 112th meeting of the Executive Council was held in Tbilisi, and the Tbilisi Declaration on the Recovery of Time-bound Tourism from Covid-19 was adopted. Thus, Georgia has been active in international cooperation in tourism, especially in UNWTO.

<sup>35</sup> <https://globe.asahi.com/article/14392665>

WINE ROUTE GUIDEBOOK

# HISTORY OF WINEMAKING

The archaeological findings at the site called Shulaveri Gora witness the fact that already 8000 years ago, in VI millennium BC, the locals knew how to cultivate grapes and turn them into a magical drink that makes one merrier.



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THE FOSSILIZED GRAPE PIPS AND LEFTOVERS OF CLAY POTTERY OF SPECIFIC SHAPE FROM DANGREULI GORA SETTLEMENT NEAR MODERN MARNEULI PROVE THIS STATEMENT TIME AND AGAIN. THE CULTIVATED GRAPE VARIETY VINIS VINIFERA COMES FROM HERE. AND ITS PRODUCE WAS FERMENTED AND SERVED IN THE SAME KIND OF CLAY VESSELS THAT ARE USED IN XXI CENTURY.

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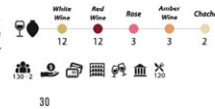
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Gvuani  
Open for visits: every day, 10:00 - 22:00  
Booking in advance / Walk - in is possible

Services: tasting • sommelier service • pressing of grapes and wine production • churchkhela making master class • bread baking master class • chacha distillation • qvevi opening • participation in harvest (trvelli) • lamada • tour to the production • folk show







## 8. Human resource development and tourism services

### 8.1. Central Asia

#### 8.1.1. CAREC Tourism Strategy 2030

CAREC's Tourism Strategy 2030 cites Quality and Standards as the second pillar of its five strategic pillars and Skills Development as the third pillar. Along with developing tourism facilities and tourism infrastructure, CAREC is trying to strengthen the tourism sector in Central Asia by improving the quality of tourism experiences.

##### Strategic Pillar 2: Quality and standards

Tourism Strategy 2030 points out that because tourism services are provided by SMEs, except for some international hotel chains, they lack the know-how and resources to meet quality-of-service standards in the CAREC region. However, it suggests that the key to increasing global competitiveness and attracting tourists from high spending markets is establishing and operating uniform service quality and environmental standards within the region. This requires Visit Silk Road branding advocated by the Strategy to build effective and harmonized minimum quality-of-service standards. The following four examples of regional projects and initiatives are proposed.

- Development of common minimal quality, hygiene, and environmental standards of tourism facilities, attraction sites, hotels, restaurants, transportation methods, airports, trains, and bus stations. (e.g., implementation of a rating system for accommodation, development of "silk road quality label" for tourism services),
- Development and implementation of a system for registration of tourism businesses and effective regionally harmonized inspection mechanisms for tourism service providers to ensure standards compliance,
- Development and implementation of a formal claim management system for tourists, providing incentives for businesses with high ratings and penalties for businesses with low ratings, and
- Support tourism businesses, particularly SMEs and women-owned enterprises, to increase their capacity to implement quality standards and access to efficient promotional tools.

##### Strategic Pillar 3: Skills development

Tourism Strategy 2030 notes that all CAREC member countries lack the skills to promote tourism. The public sector requires expert and up-to-date knowledge on effective tourism policy and strategy development, tourism site management, digital marketing standards, safety and health regulations, and environmental and socio-economic sustainable policies. In the private sector, knowledge improvement on the development, management, and marketing of tourism products, services, and experiences is required. Furthermore, regarding the human resource development system for the tourism sector, it is

necessary to produce sufficient human resources in terms of both quality and quantity to satisfy current and future demands. The Strategy says that online skills development in CAREC member countries has only begun, but it is a cost-effective tool to bridge the lack of skills in the tourism sector.

The Strategy said that developing integrated training through regional programs and maximizing digital technologies can help member countries compensate for their skills shortages. The Strategy also noted that the following initiatives, which are positioned under this pillar, need to be promoted under close coordination with the private sector to bridge the gap between the actual situation in the tourism sector and educational content.

- Develop a remote education system that can be used by students, teachers, private sector executives, and government officials and that awards certificates from internationally accredited institutions,
- Develop common curricula and qualifications that consider students who have received advanced education after vocational training. A related initiative is the mutual recognition of tourism-related degrees and qualifications among CAREC member countries,
- Improve the quality of tourism education and skills development by aligning with international standards and best practices,
- Develop a partnership program among tourism education and training institutions in the region and a platform to support knowledge sharing among CAREC member countries (tourism education and training institutions such as the Silk Road International Tourism University can be used as a venue to provide demand-driven capacity building activities where tourism professionals can learn best practices in tourism destination development and management),
- Promote intra-regional student mobility, including employment, internships, and faculty exchanges, and
- Improve tourism professionals' skills through specialized training programs accredited by reputable institutions and organizations. Examples are tour guides (World Federation of Tourist Guide Associations), ski instructors (International Ski Instructors Association), travel agencies (International Air Transport Association), and MICE.

#### Projects related to human resource development and tourism services

The Tourism Strategy 2030 lists projects and initiatives underpinned by five strategic pillars in the Regional Tourism Investment Framework (2021-2025). Table 8.1 tabulates the projects and initiatives related to the five countries covered by this study, which relate to the two areas of the "Strategic Pillar 2: Quality and standards" and the "Strategic Pillar 3: Skills and development".

**Table 8.1: Projects listed in CAREC Tourism Strategy 2030 related to human resource development and tourism services**

Strategic Pillar	Projects/activities	Overview	Cluster/country	Status	Implementation period
2	Establishment and operation of common minimum quality standards	Establishment and operation of a common health and safety protocol under the Almaty-Bishkek Economic Corridor	Kazakhstan, Kyrgyz Republic	Proposed	2020-2021
	Development of data on registered tourism operators	Establishment of a registration system for tourism operators (the register could be connected to CAREC's tourism web portal)	Pilot projects in at least two countries	Proposed	2023-2024
3	Unification of standards for tourism education and skills	Development of common curricula and qualifications at vocational training and higher education levels for mutual recognition of degrees and qualifications for tourism professionals among CAREC member countries	Azerbaijan, Turkmenistan, and Uzbekistan	Proposed	2022-2024
	Capacity building and regional knowledge sharing	Training and capacity-building programs for tourism professionals (public and private sector), teachers, and students on best tourism destination development and management practices.	All member countries	Proposed	2021-2022
		Development of partnership programs between tourism education and training institutions in the region	Azerbaijan, Uzbekistan	Proposed	2022-2023
		Strengthening capacity for the public and private sectors in the implementation and monitoring of health and safety measures and procedures	Kazakhstan, Kyrgyz Republic	Proposed	2020-2021
		Improving the skills of local tour guides to effectively meet the needs and expectations of tourists from neighboring countries and distant markets with preserving natural and cultural tourism resources	All member countries	Proposed	2022-2023
	Online training and skills development	Development of an online program for tourism skills development for CAREC member countries, including tailor-made courses for acquiring new skills and cooperation from the UNWTO Academy on technical assistance and awarding of certificates	Azerbaijan, Kyrgyz Republic, Uzbekistan	Proposed	2021-2023

Source: Compiled by the survey team based on CAREC Tourism Strategy 2030

### 8.1.2. Almaty-Bishkek Economic Corridor Tourism Master Plan

The Almaty-Bishkek Economic Corridor (ABEC) Tourism Master Plan shows a development plan that divides the 10 years from 2020 into three phases: the initial phase, the second phase, and the third phase. It also divides the priorities of targeted foreign markets into three levels: The first level, the second level, and the third level<sup>1</sup>. The targets for the first phase are applied to countries classified as the first level, the targets for the second phase to second level countries, and the targets for the third phase third level countries, respectively. Table 8.2 summarizes the overall policies of activities in each phase and policies related to human resource development and tourism services. From Table 8.2, it can be observed that

<sup>1</sup> These markets are ranked by four criteria: geographic and cultural vicinity, average outbound growth rates in the last decade, size of the outbound tourism market, and average tourist spending per trip.

the plan intends to build and strengthen quality standards in a step-by-step manner to build, maintain, and strengthen the ABEC brand.

**Table 8.2: Summary of the ABEC Tourism Master Plan**

Phase	Period	Target markets	Action plans	Policy for human resource development and tourism service
1	From 2020	First level China United Arab Emirates Korea Iran	- Develop the market of the first level while improving existing tourism products and mechanisms.	Establish and operate quality standards.
2	From 2024	Second level France Germany India Russia United Kingdom	- Develop the market of the second level. - Ensure the tourism products and ABEC brand.	Protect and enhance the ABEC brand through quality standards and appropriate training.
3	From 2029	Third level America Australia Hong Kong (China) Ireland Japan Moldova Pakistan Canada	- Secure the market that has already been developed. - Develop the third stage market. - Expand the capacity of tourism service.	To ensure the quality assurance system.

Source: compiled by the survey team based on the Almaty-Bishkek Economic Corridor Tourism Master Plan

### 8.1.3. Improving Education Skills, and Employment Tourism

Prior to the "Almaty-Bishkek Economic Corridor Tourism Master Plan," CAREC published "Improving Education Skills, and Employment Tourism Almaty-Bishkek Economic Corridor" in May 2019. The "Improving Education Skills, and Employment Tourism" analyzes (1) the demand and supply of human resources for tourism in the Almaty-Bishkek Economic Corridor, (2) the challenges of tourism human resource development, and (3) makes two proposals for the establishment and operation of a Center of Excellence (COE) for tourism human resource development.

The first proposal is the establishment of international COE by the private sector, and the models are Ecole Hotelierie Lausanne in Switzerland and Module University in Austria<sup>2</sup>. The second proposal is that the governments of Kazakhstan and the Kyrgyz Republic have several human resource development institutions for the tourism sector in their capitals, provincial capitals, and tourist destinations and the both governments form a network of such institutions and establish and manage a human resource development fund.

By combining these two types of human resource development institutions for tourism, it is proposed that the international COE will have a leading role in the development of human resources for tourism in the entire network while improving the quality of human resources for tourism in the entire region.

<sup>2</sup> A private university headquartered in Vienna with campuses in Dubai, China and Thailand

## 8.2. Uzbekistan

Table 8.3 shows the number of tour companies and customers served and sales value between 2016 and 2019. The number of tour companies increased from 433 to 517, an increase of only 84 (19%); however, the number of customers served almost doubled, and the value of tour packages sold increased 7.8 times.

**Table 8.3: Number of travel companies and breakdown of services**

Items	Unit	2016	2017	2018	2019
Number of tour operators and agents	Companies	433	449	502	517
Total persons served	Persons	465,403	669,982	713,167	941,990
Inbound tourism	Persons	152,616	167,394	224,796	348,731
CIS countries	Persons	16,638	20,471	52,247	91,202
Foreign countries	Persons	135,978	146,923	172,549	257,529
Outbound tourism	Persons	34,088	36,045	31,981	35,984
CIS countries	Persons	2,226	4,367	5,443	7,660
Foreign countries	Persons	31,862	31,678	26,538	28,324
Domestic tourism	Persons	244,408	422,935	441,547	532,544
Number of sold trips	Trips	103,093	65,726	102,866	289,820
Amount of sold packages	UZS million	100,906.1	151,309.0	252,969.2	787,385.6

Source: Uzbekistan Tourism 2019, State Committee of the Republic of Uzbekistan on Statistics, 2000

Table 8.4 shows the distribution of tour companies in the regions and an autonomous republic and the number of customers in 2019. 64% (332 companies) of all tour companies (517 companies) are concentrated in Tashkent, with Samarkand (68 companies) and Bukhara (37 companies) accounting for 13% and 7%, respectively. On the other hand, in terms of the number of clients served, Khorezm Region, which has only 11 companies for inbound and domestic tourism, served more clients than Tashkent City, but this is considered a possible statistical error. Excluding this factor, most tour companies that sold products to customers were in Tashkent City.

**Table 8.4: Distribution of travel agencies and number of customers served (2019)**

Region/autonomous republic	Number of tour agents and operators	Served persons			
		Total	Inbound tourism	Outbound tourism	Domestic tourism
Republic of Karakalpakstan	7	8,194	120	60	8,014
Andijan	6	684	-	2	676
Bukhara	37	12,356	3,746	25	7,108
Djizak	11	18,508	236	-	18,272
Kashkadarya	7	11,873	3,608	294	7,968
Navoi	7	16,340	3,696	20	12,624
Namangan.	6	2,495	163	25	1,426
Samarkand	68	56,229	31,365	596	23,821
Surkhandarya	3	3,960	-	-	3,960
Syrdarya	1	6,601	-	-	6,600
Tashkent.	14	16,107	86	-	16,020
Ferghana	7	1,557	-	1	1,062
Khorezm	11	448,397	177,295	51	271,051
Tashkent City	332	338,689	128,416	34,910	153,942
Total	517	941,990	348,731	35,984	532,544

Source: Uzbekistan Tourism 2019, State Committee of the Republic of Uzbekistan on Statistics, 2000

Concerning human resource development, in Uzbekistan, universities with tourism-related departments mainly train management-level human resources, and colleges train field-level human resources. In addition, the private sector is also promoting its human resource development and formulation and

operation of quality standards.

Table 8.5 and Table 8.6 show the number of facilities, enrolments, students, and graduates of universities and colleges with tourism departments. The number of facilities at both universities and colleges fluctuates significantly from year to year, and there were no students enrolled at the colleges in the 2018/19 academic year. This may be due to changes in the college system discussed below.

**Table 8.5: Number of institutions and students in universities with tourism departments**

Academic Year	2016/17	2017/18	2018/19	2019/20
Number of institutes	10	18	11	15
Number of entering students	512	597	865	1,507
Total number of students	1,731	1,932	1,628	2,799
Number of graduates	358	457	195	174

Source: Uzbekistan Tourism 2019, State Committee of the Republic of Uzbekistan on Statistics, 2000

As described in section 2.1.3, the Government of Uzbekistan wants to increase the number of accommodation rooms from 20,000 in 2018 to 64,000 in 2025. However, the number of university graduates who will be at the management level in hotels and college graduates who are expected to work in accommodation rooms is far below the planned increase in rooms. Drop-outs are also likely to have occurred, as the number of graduates at both universities and colleges has declined relative to the number of students enrolled.

**Table 8.6: Number of institutions and students in colleges with tourism departments**

Academic Year	2016/17	2017/18	2018/19	2019/20
Number of institutes	39	43	37	36
Number of entering students	1,478	951	-	830
Total number of students	3,839	3,472	2,117	1,688
Number of graduates	1,322	1,239	1,117	1,653

Source: Uzbekistan Tourism 2019, State Committee of the Republic of Uzbekistan on Statistics, 2000

Graduates of universities and colleges with tourism departments are employed in accommodation facilities and the hospitality industry in general, such as tour companies and restaurants, and it is necessary to develop human resources who can meet the labor demand in the whole hospitality industry. In addition, some students graduate from universities and colleges with tourism departments but go to work for companies in other industries or drop out as mentioned above. Considering these factors, it is necessary to analyze the supply and demand of human resources for tourism.

### 8.2.1. Universities

Universities with courses in tourism and foreign languages mainly produce a tourism workforce. In the study in Uzbekistan, the study team conducted interviews with the School of Tourism and Hospitality, Management Development Institute of Singapore (MDIS) in Tashkent, and Silk Road International Tourism University in Samarkand.

## MDIS

MDIS is a university with five faculties, School of Business and Management, School of Banking and Finance, School of Language and Communication, School of Fashion and Design, and School of Tourism and Hospitality. It was established in September 2007, triggered by an agreement with then-President Nathan when Karimov, the first president of Uzbekistan, visited Singapore in 2007. MDIS employs a curriculum from three universities in the United Kingdom, and lectures are given based on Bangor University curricula at the School of Tourism and Hospitality. In MDIS, bachelor's and master's levels of education are provided and certified by Uzbekistan's Ministry of Higher and Secondary Specialized Education. About 200 students are enrolled at the bachelor level in the School of Tourism and Hospitality, and the annual tuition fee is UZS28 million (about JPY0.3 million).

The campus has Hospitality Training Center with bars, restaurants, and training rooms that model real hotels and offers practical training in food and beverage service and housekeeping. In addition, internships at hotels and travel agencies are required to integrate theory and practice. In the fourth year, the final school year, the graduation thesis is written as the final project. Two startup companies have won governmental subsidies with Tourism Innovation and Co-learning Center in the university.

One of the characteristics of MDIS is that all lectures are given in English. Uzbekistan's national universities usually have entrance exams, but MDIS requires IELTS 5.5 or higher scores and a mathematics exam instead of an entrance exam. Ninety-eight percent of the graduates are employed in the tourism sector, such as hotels and travel agencies. Ninety percent find employment in Uzbekistan and the rest outside the country. High English proficiency appears to have worked in favor of employment, and some students who had internships in the US find employment where they interned. Another feature is that the students' knowledge is not biased in Uzbekistan's tourism industry because the school often incorporates examples from abroad in its lectures.

On the other hand, since the tourism sector has an image of unstable occupations in Uzbekistan, the school is less popular than other schools. About 10% of tourism and hospitality students change majors to other schools every year.

In addition, because the interviewee from MDIS was an alumna of the International Tourism Faculty of the Tashkent State University of Economics, the study team was able to hear the outline of the faculty at the same time. The faculty has a long history in Uzbekistan but is smaller than other faculties. Since tourism itself is an industry-developed after the independence of Uzbekistan, there are no professors with a tourism background. As most of their backgrounds are economics, tourism economics is the main subject of the curriculum. While MOTAS supports public universities, private universities like MDIS do not have a strong relationship with MOTAS. Although the Tashkent State University of Economics curriculum has been adopted at other national universities, unlike MDIS, it tends to be biased by the context of the tourism sector in the Russian-speaking world due to a language barrier. In addition,

although the tourism department of the national university had no practical training facilities before, the establishment of practical training facilities was obligated by the Presidential Decree.

From the interview above, one can see the composition of tourism education: traditional national universities emphasize theory, and emerging universities combine theory, practice, and foreign language education. At the same time, traditional schools seem to be gradually shifting to tourism education, incorporating a practical approach.

#### Silk Road International University of Tourism

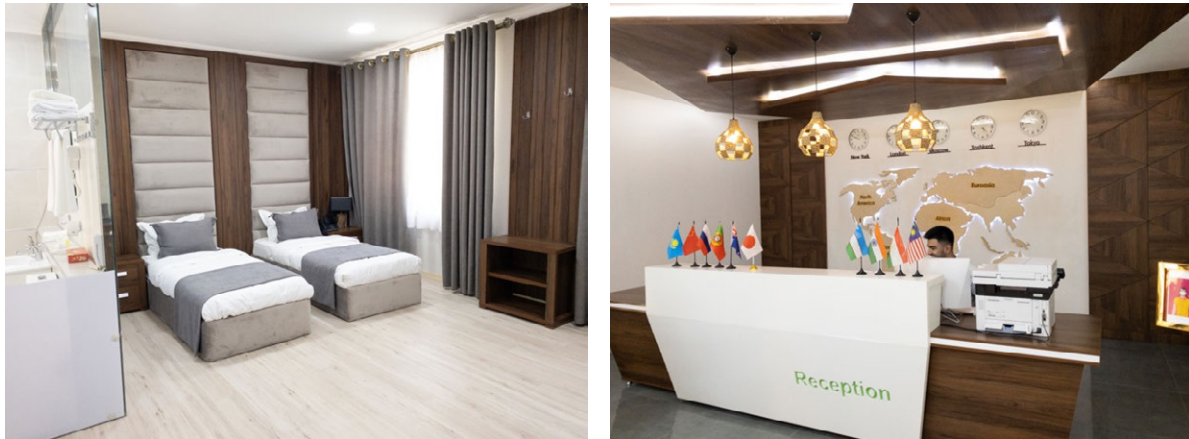
The university was founded in 2018 under the leadership of the President and had a total of approximately 1,200 students enrolled in undergraduate and graduate schools. Lectures are held in English, and 10 out of 67 professors are foreigners. There are three courses (specialized course, foreign language course, and general course), and there are nine specialized subjects, including tourism development, marketing, and hotel management. When the school opened in 2018, the school building was in a different location, but it moved to the current school building (Smart Campus) in 2021. In September 2021, all IT adoption and diffusion will be completed, and students will study through an application. Within the university, there are training rooms of restaurants and hotels, and students are trained so that they can get a job as an immediate workforce. External lecturers often teach practical courses, and an Italian chef also provides practical training.

It has cooperation agreements with 62 universities, one of which is Wakayama University in Japan. In addition, there is a double degree program with universities in Indonesia, Malaysia, and China, and another is scheduled to be concluded with Greenwich University in the United Kingdom in 2022. It also cooperates with UNWTO but is not currently engaged in any activity due to the impact of COVID-19.

At the study team's visit, the Vice President expressed his desire to invite Japanese university faculty members. Three years have passed since the opening of the school with the increased number of students, securing teachers has become an issue in the process of enhancing the curriculum. Two requests were made by the Silk Road International University of Tourism in the autumn of 2019 for JICA Overseas Cooperation Volunteers. One with practical experience in tourism promotion and tourism marketing and another with practical experience in hotel management and hotel services were requested respectively.

For university teachers dispatched from Japan, the Silk Road International University of Tourism can provide accommodation and transfer bus services and pay salaries to young postdocs in the lowest category of professors (salaries may be increased depending on performance). In addition to faculty members, the university also considers having people with many years of experience in tourism provide training for employees at hotels and restaurants.





Training Room of Silk Road International University of Tourism

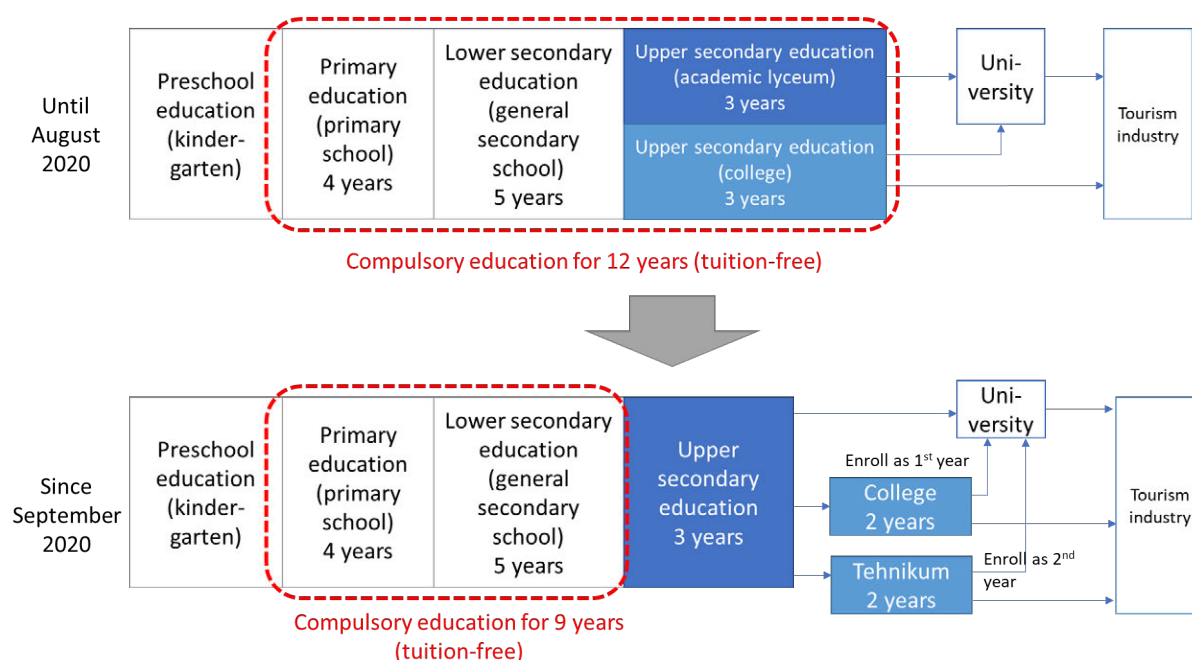
### 8.2.2. College

In Uzbekistan, about 10% of the population of the same age went to academic lyceums (liberal arts high schools), and the remaining 90% to vocational colleges (vocational high schools) in the latter half of the three years of secondary education, which corresponds to Japanese high schools. In the case of the academic lyceums, students mainly learned the expertise to go to universities. In contrast, in the vocational colleges, the various techniques directly connected to the occupation were learned<sup>3</sup>. In other words, education for the tourism workforce at the field level seemed to be mainly conducted at colleges. However, according to the final report of JICA's SDGs Business Supporting Surveys implemented by JTB Corporation<sup>4</sup>, the system mentioned above has been largely changed since September 2020 (refer to Figure 8.1).

Colleges were shifted from a free educational institution where students learn as compulsory education after graduating from junior high school to a paid educational institution where students learn after graduating from senior high school. In addition, it has been shortened from the three-year system to the two-year system. Students who have received two years of education at a college can then find employment, and if they pass an exam, they can also go on to the first year of university. On the other hand, as an educational institution parallel to colleges, a new category of *tehnikum* (vocational training schools) was established. Like colleges after the reform of the educational system, *tehnikum* is a two-year educational institution that advances to higher education after graduation, but the characteristic of *tehnikum* is that graduates can be incorporated as second-year students at a university. It is conceivable that *tehnikums* will become more popular than colleges as a step to go to a university in the future (JTB Corp. 2021, p. 15).

<sup>3</sup> "29 Education" by Asuka Kono (2018), "60 Chapters for Knowing Uzbekistan" by Chika Obiya, Akashi Shoten, pp. 194-200.

<sup>4</sup> JTB Corp. (2021) "Final Report on Republic of Uzbekistan SDGs Business Model Formulation Survey with the Private Sector for New Value Creation Service of Tourism Development."



Source: Prepared by the survey team from Kono (2018) and JTB Corporation (2021)

**Figure 8.1: The changing position of colleges in Uzbekistan**

During the interviews with MOTAS and MIFT in the study in Uzbekistan, it was indicated that there are 14 colleges with tourism departments across the country, while Table 8.6 indicates that there are 36 colleges with tourism departments in the academic year 2019/20. Table 8.7 summarizes the main colleges with tourism departments and their teaching areas.

**Table 8.7: Colleges with major tourism departments and their teaching areas**

Name of college	Specialties
Tashkent tourism professional college	- Manager of hotel and restaurant services - Kitchen staff - Organizer of tourism services
Sattepo (Samarkand) tourism and household services professional college	- Organizer of tourism services - Manager of hotel and restaurant services - Hairdressing and decorative make-up services - Kitchen staff - Photography
Bukhara tourism college	- Manager of hotel and restaurant services - Kitchen staff - Organizer of tourism services - Variety dresses atelier
Urgench tourism and hotel industry college	- Manager of hotel and restaurant services - Kitchen staff - Organizer of tourism services
Tashkent tourism and hotel industry college	N/A.
Bustanlik (Tashkent Province) tourism and service college	N/A.
Urgench tourism and entrepreneurship college	N/A.
Khiva tourism professional college	N/A.
Nukus tourism and service college	N/A.
Kokand tourism and service college	N/A.

Note: N/A indicates that the information does not exist

Source: Prepared by the survey team from the Colleges' websites

The study team did not have an opportunity to have interviews with colleges. Additional information to colleges and tehnikum is needed to confirm the issues specific to colleges and the changes caused by the above educational reforms.

### **8.2.3. Private sector**

Since the relaxation of visa requirements, the number of tourists increased sharply until 2019, exposing the lack of tourism personnel in terms of quality and quantity in Uzbekistan. In addition, tourism professionals pointed out that even graduates of universities and colleges are not industry-ready. To improve this situation, the private sector is also working to develop human resources and standards.

#### Hotel industry

In April 2019, private sector hotel industry officials launched the Hoteliers Association of Uzbekistan, which has three pillars of activities: training hotel employees, building hotel standards (e.g., the introduction of the rating system), and digital transformation.

In human resource development, the association established a training institution named the Academy of Hospitality to train hotel employees. It accepts people of all ages who want to work in the hotel industry as students and offers the following eight programs<sup>5</sup>.

- Marketing and management,
- Restaurant service,
- Front office,
- Engineering,
- Laundry and housekeeping,
- Safety and quality of services,
- Psychology in the field of hospitality, and
- Foreign languages.

School fees are collected from hotels to which students belong, but hotels are reluctant to invest in human resources. Many managers still regard human resources as costs and think they sell rooms and beds rather than services.

Standards are being developed based on the awareness that those established by the Government of Uzbekistan (Uzbekistan Standards Bureau: UZSTANDARD) are not in line with reality. Criteria such as hotel ratings were once given unilaterally by the state but can now be independently established by the private sector. The standard for hotels established by the government attaches importance to the hardware side, such as facilities and equipment, but the association wants to attach importance to the

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<sup>5</sup> Academy of Hospitality, "Our Programs," Browsed on August 8, [http://hotelacademy.uz/st#rec160804242\(2021\)](http://hotelacademy.uz/st#rec160804242(2021))

service level. For example, there is a national standard that four-star hotels must be equipped with rental bicycles. The same standard is applied to hotels in tourist areas where bicycle mobility is not common. Consequently, a hotel in a city with no roads that can run on bicycles was instructed by the government to set up a rental cycle, and the hotel manager approached the association to ask what to do. Each internationally branded hotel also has its standards but may not meet Uzbekistan's standards. The association is currently studying which country's rating should be used as a model for establishing standards.



Bicycles installed in the hotel

### Tour guide

Tourist Guide Association was established in 2019 by tour guides. It has about 80 members.

Since 2020, anyone in Uzbekistan has been able to create a tour guide training institution if the standards set by the national government are met. Currently, there are five private guide training institutions: one in Samarkand, two in Tashkent, one in Hiva, and one in Namangan, and people with a university degree are eligible for admission. The learning period is six months, and there are 540 hours of class. Since only license holders of the tour guide can serve as instructors, the association supports these training institutions in terms of educational program creation and dispatch of instructors. They provide practical programs, 90% of which is on-site guidance.

Currently, universities also have a program to train tour guides, but the association believes that there is a shortage of people who can teach practical guiding and that they should ask the association to send lecturers. The association also has the initiative to launch a school as a limited liability company (LLC) in which experienced guides educate novices. The reason is that there is a request from MOTAS to promote ecotourism and pilgrimage tourism, and in fact, the need for guidance on nature is growing, but there is a lack of guides with the necessary expertise.

### 8.3. Kyrgyz Republic

Table 8.8 shows tourism-related enterprises (including private enterprises) registered in the Kyrgyz Republic. The tourism and leisure facilities enterprises are increasing at the rate of 5% per year, and the restaurants and tour companies at the rate of 7% per year, respectively. Table 8.9 shows the distribution of the tourism and leisure facilities, restaurants, and tour companies in regions and cities in 2020. Around half (49%) of the tourism and leisure facilities are located in Issyk- Kul Region, 19% in Bishkek City, and 11% in Naryn Region. On the other hand, one-third of all restaurants and 63% of all tour companies are in Bishkek City.

**Table 8.8: Registered tourism-related enterprises**

Kind of tourism-related enterprises	2016	2017	2018	2019	2020
Tourism and leisure facilities	877	918	967	1,047	1,084
Restaurants	4,744	5,112	5,438	5,858	6,248
Travel agencies and tour operators	3,502	3,732	3,968	4,298	4,648

Source: Tourism in Kyrgyzstan 2015-2019, National Statistics Committee of the Kyrgyz Republic

**Table 8.9: Distribution of tourism-related firms in 2020**

Region/city	Tourism and leisure facilities	Restaurants	Travel agencies and tour operators
Batken oblast	26	686	77
Jalal-Abad oblast	64	671	226
Issyk-Kul oblast	536	638	357
Naryn oblast	124	170	93
Osh oblast	35	675	171
Talas oblast	16	226	23
Chui oblast	51	863	300
Bishkek City	207	2,078	2,912
Osh City	25	241	489
total	1,084	6,248	4,648

Source: Tourism in Kyrgyzstan 2015-2019, National Statistics Committee of the Kyrgyz Republic

Concerning human resource development related to tourism services in the Kyrgyz Republic, there are several universities with tourism-related departments and vocational schools specializing in tourism and hospitality business as in Uzbekistan. Table 8.10 shows the number of university students with a tourism specialization, and Table 8.11 shows the number of vocational school students with a tourism-related specialization in 2019. Tourism operators said that graduates from these universities and schools are not immediately effective. There were also signs that the private sector is working on its own to develop human resources and set standards in the Kyrgyz Republic and Uzbekistan.

**Table 8.10: Number of university students in the major of "Social and Cultural Services and Tourism"**

Unit: persons

Kind of students	2015/16	2016/17	2017/18	2018/19	2019/20
Number of entering students	500	325	382	552	677
Total number of students	2,025	1,433	1,490	1,922	2,277
Number of graduates	332	635	298	312	344

Source: Tourism in Kyrgyzstan 2015-2019, National Statistics Committee of the Kyrgyz Republic

**Table 8.11: Number of vocational school students in tourism (2019)**

Unit: persons

Kind of specialties	Number of entering students	Total number of students	Number of graduates
Chef	2,456	1,681	2,394
Chef-waiters	253	283	44
Chef-waiter, bartender	21	188	122
confectioner	126	37	150
Pastry chef, waiter	-	244	99
Confectioner, cook, baker	-	253	44
Waiter, bartender	37	-	7
Accompanying tourist routes	29	53	32
Hotel worker	-	18	216
Restaurant and hotel manager	-	-	-
total	2,922	2,757	3,108

Source: Tourism in Kyrgyzstan 2015-2019, National Statistics Committee of the Kyrgyz Republic

### 8.3.1. Post-secondary education institutions, including universities, colleges

In the Kyrgyz Republic, the following universities have departments of tourism.

- Academy of Tourism
- Bishkek State University
- Kyrgyz Economic University
- Kyrgyz National University named after Jusup Balasagyn
- Kyrgyz State University. I. Arabaev
- Kyrgyz-Turkish Manas University
- Issyk-Kul State University
- Naryn State University

Among them, the study team interviewed from Bishkek State University and received a reply to a questionnaire from the Academy of Tourism.

#### Bishkek State University

Bishkek State University is a medium-sized university with 7,500 students and 450 faculty members. It consists of nine faculties, and the Department of Geography, Tourism, and Natural Science is within the Faculty of Ecology and Management. Sixty courses per year, or 7,000 hours over four years, are the graduation requirements. Currently, there are no master's or doctoral courses in tourism, but the faculty members have a desire to create master's courses in the future. The number of students in the Faculty of Ecology and Management is 120 per academic year, of which 25 are in the Department of Geography, Tourism, and Natural Science.

On the other hand, there are 14 faculty members. The government determines the number of students, but as demand from the student side increases, the university intends to increase the admission quota in the future. The tuition is about KGS30,000 (about JPY39,000) per year. The school building also has a practical training room for restaurant and hotel reception, but it is very small and less equipped,

compared to that of the Silk Road International University of Tourism in Uzbekistan the study team visited.

In the Department of Geography, Tourism and Natural Science, an introductory internship with two-week fieldwork at museums and local historical and cultural heritage sites are assigned to second year students. There is a three-week production internship in the hotel or tourism sector in the third year. It is compulsory to conduct a three-week pre-qualification internship in private travel agencies, tour operators, or DOT in the fourth year before writing a graduate thesis. In addition, some students intern at hotels in Turkey during summer vacation. The curriculum of national universities is prepared by an educational professor institution within the Ministry of Education, Science, and Technology, and it is necessary to observe its standards. Therefore, there is no big difference in the curriculum between universities.

Approximately 30% to 35% of department graduates are employed in the tourism sector (travel agencies, hotels, tour guides, etc.), and about 40% in the private sector in other industries. Kyrgyzstan's labor market is highly fluid, and recent students often choose different jobs from their major based on prevalent trends.

The faculty members asked whether it was possible to have personnel exchanges, such as (1) inviting Japanese students to summer schools in Kyrgyzstan, (2) sending faculty members to Japanese universities to study teaching methods, and (3) sending students from the Japanese language department to Japanese universities. In addition, the Kyrgyz side expressed its request to receive financial support from the Japanese side because it is difficult for them to bear the cost of the implementation.

#### Academy of Tourism

The study team has received a completed questionnaire from the Academy of Tourism. According to it, the school was founded in 1996 and had 364 students and 10 faculty members. It has undergraduate and master's courses, and the annual tuition fee is HGS31,500 (approximately JPY41,000). The campus is equipped with a kitchen and a practical training room of a restaurant.

Hotels and travel agencies are the most common places for graduates to find employment, followed by restaurants. Few graduates become tour guides, and some find employment at the overseas travel agency, though they are comparatively few.

Representatives from the Kyrgyz Community Based Tourism Association (KCBTA) praised the graduates of the Academy of Tourism as the third-best in the field of tourism (the top is Kyrgyz-Turkish Manas University).

### **8.3.2. private sector**

In the Kyrgyz Republic, where mountain climbing and trekking are popular, there is a strong need for high-quality mountain guides, and the private sector is developing and rating mountain guides in response to these needs. Similarly, private associations have established an accreditation system for tour guides. In addition, KCBTA rates guest houses and Yurt camps by its standards.

#### Mountain guides

Kyrgyz Mountain Guide Association (KMGA), established in 2007, consists of individual mountain guides. Only mountain guides above a certain level are allowed to join, and the current number of members is 37. Three volunteers run the secretariat. KMGA is a member of the International Federation of Mountain Guides Associations (IFMGA), and Kyrgyzstan is one of the only three Asian members along with Japan and Nepal.

KMGA also operates a mountain guide school authorized by the Ministry of Education, which fosters the following four levels of guides:

- Mountain guides (KMGA's certificate and IFMGA's license)
- Mountaineering guides (KMGA's certificate)
- Off-piste guides (KMGA's certificate)
- Trekking guides (KMGA's certificate)

The representative of the KMGA also serves concurrently as the chairman of an NPO named Kyrgyz Mountain Rescue Services (KMRS) to improve the safety of mountain climbing and trekking. Mountain rescue is under the jurisdiction of the Ministry of Emergency Situations<sup>6</sup>, but since there are no teams to rescue individuals who climb mountains, private organizations, such as KMRS, are also asked to rescue them. KMGA incorporates mountain rescue training to foster mountain guides capable of rescue. The chairperson of KMGA considers it problematic that while the country promotes mountaineering and trekking, it does not take adequate measures to improve its safety.

#### Tour guides

Kyrgyz Association of Tour Operators (KATO) is an association established in 1999 by 42 tour operators in the Kyrgyz Republic. The current members are 43 companies that handle inbound tourists, Kyrgyz-Turkish Manas University, one transportation company, and KCBTA. Its purpose is to protect the interests of tour operators in the country and promote the tourism industry, and it works in cooperation with the government.

KATO organizes two-month tour guide training sessions from February to April before the peak season.

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<sup>6</sup> <http://en.mes.kg>



A certain number of guides leave the country each year after the end of the season, so it is necessary to cultivate new guides every year. A guide certificate is issued to participants who have completed the training and passed the final examination. Some large-scale tour operators train guides and issue certifications on their own. The certificate works in favor of getting a guide work.

In May 2021, KATO, which considered it necessary to introduce a new approach to tourism as a measure against COVID-19, obtained Safe Travels certification from the World Travel and Tourism Council (WTTC)<sup>7</sup> with the support of GIZ's Green Economy and Sustainable Development of the Private Sector. KATO is considering issuing similar labels to hotels and is now considering standards to be established.

#### CBT-related organization

Kyrgyz Community Based Tourism Association (KCBTA) is an association of 15 CBTs located in various parts of the country, established in January 2003 with the support of HELVETAS.

With the assistance of Swiss and Dutch experts, KCBTA has developed and operates its rating criteria, Edelweiss for guesthouses, Yurt camps, and tour guides. Companies are to receive accreditation every two years and are classified into three stages. The previous survey was conducted in 2018 but was not implemented in 2020 due to the impact of COVID-19. CBT's standards for tourism products in Kyrgyzstan serve as a reference for CBT providers in other Central Asian countries. Kazakhstan formulates and operates under "Tulip" and Tajikistan "Suzani," respectively. There is an initiative in Uzbekistan to introduce similar standards.

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<sup>7</sup> Guidelines developed by WTTC to address COVID-19. Only tourist destinations and tourism businesses that comply with the safety standards and infection control measures established by WTTC may acquire them.



## 9. Organizations involved in tourism

### 9.1. Uzbekistan

#### 9.1.1. Ministry of Tourism and Sports

On April 6, 2021, the State Committee for Tourism Development and Sports department of the Ministry of Physical Culture and Sports was merged into the Ministry of Tourism and Sports (MOTAS). At the same time, the Department of Cultural Heritage of the Ministry of Culture became the Agency for Cultural Heritage. The Tashkent office of MOTAS had 158 employees, while the Agency for Cultural Heritage had 40 employees. MOTAS had regional offices in each Region in June 2021. Regions where tourism is an important part, such as Samarkand, have about 24-30 employees, and in June 2021, a total of 206 employees were working in these offices nationwide.

MOTAS' new organization had not yet been finalized as of June 2021. However, it had established the departments shown in Table 9.1. MOTAS also has departments related to infrastructures, such as sanitation and transport.

**Table 9.1: Main departments of MOTAS**

Departments related to tourism	Departments related to sports
Marketing Department	Olympic and Paralympic Sports Development Department
Public-private partnership project implementation department	National and Non-Olympic Sports Development Department
Investment Department	Department of Coordination of Sports Federations
Department of Investment Promotion and Regional Program Implementation	Department of Mass Sports Development
Special Zones, Cluster Organization and Development Department	Department of Physical Education Standards
Department of Diversification of Services in the field of Tourism and Sports	
Department of Tourism and Sports Infrastructure Development	
Finance and economics department	
Finance and planning department	
Department of International Tourism and Transport Logistics Development	Department of Work with Sports Schools and Regional Specialization in Sports
Department of Pilgrimage Tourism Development	Monetization, bookmaking, and lottery department
Department of Organization of Sanitary-Hygienic Stations and Information Centers	
Digitization Management	
Certification and Standardization Department	
Department of Implementation of the Targeted Investment Program	
Department of International Relations and Grants	
Department of Cooperation with Non-governmental Organizations	

Source: Prepared by the study team from information provided by MOTAS

After independence, tourism in Uzbekistan was handled by the state enterprise Uzbek Tourism. Uzbek Tourism was responsible for the administration of tourism, including the approval of tourism service providers in Uzbekistan, and at the same time provided tourism services with its hotels and vehicles. However, under the current administration, Uzbek Tourism was reorganized into the State Committee on Tourism Development in 2016 after it was determined that an entity that conducts both administration and tourism business was hindering the development of the tourism industry.

MOTAS wants to have an initiative in tourism in Central Asia and is active in international organizations such as UNWTO. As a result, the Minister of Tourism and Sports, Mr. Abduhakimov, was appointed as the Vice-Chairman of the 24<sup>th</sup> General Assembly of UNWTO organized from November to December 2021<sup>1</sup>. Samarkand was selected as the host city of the 25<sup>th</sup> General Assembly<sup>2</sup>. In addition, Samarkand is scheduled to host the summit of the Shanghai Cooperation Organization in 2022 and is also active in organizing and attracting international conferences.

### **9.1.2. National PR Center**

The National PR Center<sup>3</sup> is an enterprise under MOTAS established by presidential decree in 2018. Since its affiliation was changed from the State Committee on Tourism Development to MOTAS, it is now involved in promoting sports in addition to tourism. The MOTAS's Marketing Department carries out marketing, and the National PR Center carries out the following promotional activities. 20% of the Uzbekistan Tourism Development Fund (financed by taxes collected from tourists) is used for the operational budget of the PR Center.

- Participate in travel expos in cooperation with travel agencies,
- Develop and manage the website "Uzbekistan Travel" to promote domestic tourism,
- Prepare brochures and magazines in each language (15 languages), along with novelty goods (T-shirts, hats, ballpoint pens, etc.) to be distributed through the embassies of Uzbekistan in each country,
- Invite journalists, bloggers, etc. to Uzbekistan to disseminate information about Uzbekistan to the world (implement FAM tours),
- Organize festivals, fairs, and other events, and
- Provide tourism promotion materials to travel agencies, etc., in various countries<sup>4</sup>.

In addition, there is a move to establish a website that compiles information on tourism in Central Asia, and the National PR Center is acting as a coordinator for this preparation. This project is being carried out at the initiative of the President, and Uzbekistan will bear the cost of developing the website. Tourism information will be collected from each country.

### **9.1.3. Ministry of Investment and Foreign Trade**

The Ministry of Investment and Foreign Trade (MIFT) is responsible for promoting and facilitating investment and foreign trade and attracting investment in tourism. MOTAS's tourism development

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<sup>1</sup> <https://www.unwto.org/event/general-assembly-twenty-fourth-session>

<sup>2</sup> <https://twitter.com/UNWTO/status/1466458213331652609>

<sup>3</sup> <https://uzbekistan.travel/>

<sup>4</sup> In the interviews with tour companies in Japan, it was pointed out that it is difficult to obtain photos and other materials to be used for tourism promotion. The National PR Center can provide materials other than those on the website.

strategy is complicated, so MIFT has developed focus areas on three areas in the tourism sector: (1) religious and pilgrimage tours, (2) eco-tours and adventure tours, and (3) medical tourism. MIFT targets large-scale investments, while MOTAS targets small and medium-scale investments.

One of MIFT's investment attraction policy pillars is the Special Economic Zone (SEZ) system. The "Charvak Free Economic Zone" around the Charvak Lake in Tashkent Region has been designated an SEZ for tourism development. MIFT aims to develop six to seven SEZs for tourism in the future.

#### **9.1.4. Association of Private Tourism Agencies of Uzbekistan**

The Association of Private Tourism Agencies of Uzbekistan (APTA) is a government-led association established in 1998. In 2019, more than 200 travel agencies, hotels, and guesthouses were registered as members, and seven staff members were working as full-time employees of the Secretariat.

The APTA is a strategic partner of MOTAS and the Ministry of Transportation. The association's offices are in the building owned by MOTAS, which also houses the MOTAS PR Center (1<sup>st</sup> floor) and Certification Center (2<sup>nd</sup> floor).

APTA's activities include (1) promotion of tourism in CIS countries, Europe, and Southeast Asia and analysis of the tourism market of those countries, (2) organization of training and seminars in cooperation with development partners, (3) diversification of tourism products such as agricultural tourism and hiking (in collaboration with development partners), (4) introduction of certification of environmental friendliness in hotels, and (5) training of hotel, travel agency and restaurant staff.

Another government-led tourism-related association like APTA is the Hunarmand Association, an association of craft makers<sup>5</sup>.

#### **9.1.5. Hoteliers' Association**

Hoteliers' association<sup>6</sup> was established in 2019 by mid-sized hotels in Uzbekistan and abroad, with about 50 member companies. The purpose of establishing the association was to address the problem of hotel shortages in 2018 and 2019. At the interview in June 2021, the association's membership consisted only of accommodation facilities in Tashkent, but the association was planning to recruit members from hotels outside Tashkent.

The pandemic left many hotels in the red, and the association negotiated with the government for assistance. As a result, the hotels could delay the payment of those fixed costs to 2021. The association is also lobbying the government to improve the legal system and provide training for hotel employees.

The activities of the association include training of hotel employees, and development of a Property

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<sup>5</sup> <https://handicraftman.uz>

<sup>6</sup> <https://www.hoteliers.uz/en>

Management System (PMS) that can be used in medium-sized hotels in Uzbekistan in cooperation with a Russian IT company. The company is also developing and introducing a hotel standards (rating) system that considers service levels<sup>7</sup>.

#### **9.1.6. Guide Association**

Guide Association was founded in 2019 by tourist guides and guide alumni. Most tour guides are freelance and work under contract with several tour operators, but their lives are precarious due to the lack of compliance with agreements between guides and operators and the lack of social security and pensions. This association was set up to protect the guides in a vulnerable position.

There are 80 members, and they come from all over Uzbekistan. The secretariat staff consists of nine current and former guides. It is run on a volunteer basis; it collected membership fees in 2019 but has not taken membership fees since the pandemic. They would like to establish a branch in Samarkand but are currently experiencing financial difficulties.

As for the training of tourist guides, private sector organizations can create guide training institutions from 2020 if they comply with the stipulated guideline. The association provides support in terms of creating educational programs and dispatching instructors. In addition, although the association cannot engage in commercial activities, it hopes to set up a school as a limited liability company (LLC) where veteran guides can train new guides.

### **9.2. Kyrgyz Republic**

#### **9.2.1. Department of Tourism, Ministry of Economy and Finance**

The Department of Tourism (DOT), formerly a department of the Ministry of Culture and Information, officially became a department of the Ministry of Economy and Finance on May 7, following a government reorganization on April 1, 2021. It consists of two sections: Strategic Planning and Development (five members) and Organizational, Personnel, and Legal Work (four members).

The activities of the DOT include preparation and implementation of tourism development strategies, development and operation of websites<sup>8</sup>, and direct and indirect participation in overseas travel expositions. Since there are only nine staff members in the entire department, no staff member is dedicated to tourism marketing. The department does not have access to tourism statistics and tourists' behavior after arriving.

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<sup>7</sup> In Uzbekistan, there used to be a license system and a certification system for hotels and travel agencies, but from April 2021, hotel certification is no longer mandatory. On the other hand, for travel agencies, certification is mandatory and registration is voluntary.

<sup>8</sup> <https://tourism.gov.kg/>

### **9.2.2. Kyrgyz Association of Tour Operators (KATO)**

KATO is an association of 42 tour operators in Kyrgyzstan, established in 1998. The current number of members is 43, and universities with tourism departments, one transport company, and KCBTA are also members of KATO. The primary purpose of KATO is to protect Kyrgyz tour operators' interests and promote the tourism industry.

KATO participates in the ITB Berlin, Almaty, and Russian Travel Fairs as KATO. In addition, with the support of GIZ's "Green Economy and Sustainable Development of the Private Sector," KATO intends to issue a label to hotels, which obtained Safe Travels Certification from the World Travel and Tourism Council (WTTC).

### **9.2.3. Silk Road Tourism Association**

The Silk Road Tourism Association was established in 1999 to conduct research and studies on tourism in Kyrgyzstan. At its establishment, the association aimed to develop the tourism sector in Kyrgyzstan, but after about ten years, similar associations have been established, so the association specializes in research and studies. There are 15 members and organizations, including individual businesses, professionals, and associations, and there is no membership fee. There are three volunteer staff members.

An annual activity report summarizing the issues and tourism potential of the Kyrgyz tourism sector is published and distributed free of charge to the Office of the President, relevant ministries and agencies, local governments, travel agencies, and tour operators. In return, the association sometimes asks our development partners and members to support the printing costs. The association has recently completed an analysis of the evolution of tourism policy in Kyrgyzstan since independence.

### **9.2.4. Kyrgyz Community Based Tourism Association (KCBTA)**

The official name of this organization in the Kyrgyz language is "Kyrgyz CBT Association Cooperative Association"; in English it is KCBTA (Kyrgyz Community Based Tourism Association), and in Russian, written as "KATOC.

The association is in a unique position to bring together 15 CBT Associations across the country, and three more CBT Associations are expected to become new members shortly. However, it is not in a position to supervise the CBT Associations. Each CBT Association is an independent legal entity and operates under its articles of the associations and pays taxes in its jurisdiction.

The CBT Associations of Naryn, Sary-Chelek, and Karakol were established in 2002 with the support of HELVETAS of Switzerland. Since there was a need for an association to unite these CBT associations, the KCBTA was established in January 2003 with the support of HELVETAS. At the time of establishment, offices and vehicles were purchased with the support of HELVETAS, and HELVETAS

financially supported the association for the first five years of its existence. Then, the support from HELVETAS was reduced, and the association became financially independent in 2011. Today, the KCBTA works with institutions such as HELVETAS, ACTED, and GIZ as partners in implementing training and small-scale projects.

The KCBTA has eight to nine full-time employees working in the office, and due to the increased scope of our activities, the association has recently set up another office about 200 meters away from the original office. Membership fees are low, and the KCBTA cannot operate on them alone, so it set up a travel agency with the members and used the income from the travel agency to cover its operating costs.

The KCBTA is supporting CBT associations in marketing, coordinating tours, team building, promoting overseas tourism fairs, setting standards (Quality Control), and advising. When a complaint from a tourist comes to the KCBTA, the association advises the relevant CBT Association on how to resolve the problem, for example. The KCBTA accepts reservations for CBT products in various regions to meet the needs of tourists visiting the KCBTA office.

In the past, several JICA volunteers were assigned to the KCBTA to develop and market tourism products, translate brochures into Japanese, and provide support during events.

### **9.2.5. Kyrgyz Mountain Guide Association**

The Kyrgyz Mountain Guide Association<sup>9</sup> is an association of mountain guides founded in 2000. There are no corporate members, only individual members. The KMGA is a member of the International Federation of Mountain Guides Associations (IFMGA).

Guides are classified into four categories. The association also provides training for guides.

- Mountain guides (KMGA diploma, IFMGA license)
- Mountaineering guides (KMGA diploma)
- Off-piste guides (KMGA diploma)
- Trekking guides (KMGA diploma)

## **9.3. Kazakhstan**

### **9.3.1. Ministry of Culture and Sports**

The Ministry of Culture and Sports<sup>10</sup> is the central executive body of the Government of Kazakhstan. It provides leadership in culture, internal stability, inter-ethnic harmony, language development, national symbols, national social order, archiving and documentation, religious activities, physical culture and sports, gambling, and inter-sectoral coordination and regulation of the state.

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<sup>9</sup> <https://kac.centralasia.kg>

<sup>10</sup> <https://www.gov.kz/memleket/entities/mcs?lang=en>



The Committee of Tourism Industry<sup>11</sup> is one of the committees under the Ministry of Culture and Sports. It is in charge of tourism administration (providing information to inbound and outbound tourists, contact point for investment in the tourism sector, management of gambling business) and tourism development. The committee has set up a website, "kazakhstan.travel,<sup>12</sup>" to provide information on inbound tourists.

### **9.3.2. Tourist Information Center of Almaty Region**

Tourist Information Center of Almaty Region is the tourism promotion agency of Almaty Region. The center has 18 staff members who work in the following departments: formation of tourism products, organization of marketing events, tourism promotion, and communication with the tourism industry. The center prepares tourism development plans at the Almaty governorate level, registers guides, and conducts surveys of tourists. The center has established a Facebook site to provide tourist information<sup>13</sup>.

### **9.3.3. Eurasian Tourism Association**

The Eurasian Tourism Association<sup>14</sup> was established in 2017 to set up a place for cooperation between representatives of the tourism industry in Kazakhstan; it has 44 travel agencies as members and has its Secretariat in Nur-Sultan (five staff members work full-time in the Secretariat). It considers China and the Russian Federation its strategic partners and has an office in Hong Kong. It is supported by the Greek Heraklion Development Agency SA (Anaptixiaki Irakleiou AAE OTA).

The association's activities include bringing the voice of the tourism industry to the government, exchange of information among members to government agencies, advice by legal and management experts, and participation in events by the association at a discount.

### **9.3.4. Kazakhstan Tourist Association**

The Kazakhstan Tourist Association (KTA)<sup>15</sup> was established in 1999. The association's members include 230 travel agencies, guides, hotels, and other accommodation providers, including the Kazakhstan Association of Hotels and Restaurants<sup>16</sup> (KAGiR), insurance companies, airlines, human resource development organizations for the tourism sector tourism media. Its headquarters are in Almaty, with Nur-Sultan, Aktobe, and Taraz branches. The main activities of the KTA are to:

- Promote tourism products in the world market,
- Create a positive image of Kazakhstan,

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<sup>11</sup> <https://www.gov.kz/memleket/entities/tourism?lang=en>

<sup>12</sup> <https://kazakhstan.travel/>

<sup>13</sup> <https://www.facebook.com/Tourist-Information-Centre-of-Almaty-433448726701645/>

<sup>14</sup> <https://eurasian-tourism.com/en/>

<sup>15</sup> <https://kaztour-association.com/>; <https://www.facebook.com/almatyinfo/>

<sup>16</sup> [http://kagir.kz/kg\\_0101\\_e.html](http://kagir.kz/kg_0101_e.html)

- Create a modern system of tourism-related enterprises and develop human resources for tourism,
- Cooperate among association members for information exchange and interaction,
- Participate in tourism development programs, and
- Promote ecotourism, which aims to become a major tourism product in the future.

### **9.3.5. Association of Guides**

The Association of Guides<sup>17</sup> was founded in 1994 by mountaineering enthusiasts. It has headquarters in Almaty and has 86 individuals and companies members. Currently, the Association of Guides promotes mountaineering and trekking in Almaty Region and its surrounding area and tourism and ski tours in the Region. The languages spoken by the guides are Kazakh, Russian, English, German, French, Italian, Turkish, Chinese, Korean, Japanese, Arabic, and they also provide transportation services.

## **9.4. Turkmenistan**

### **9.4.1. Department of Tourism, The Union of Industrialists and Entrepreneurs**

The Union of Industrialists and Entrepreneurs<sup>18</sup> is a non-profit association established under the Law of Turkmenistan on the Union of Industrialists and Entrepreneurs of Turkmenistan to build cooperation among its members (individuals or legal entities) and implement the economic and industrial policies of the government for the economic development of Turkmenistan. A department in charge of tourism was created in October 2019 and is responsible for supporting small and medium-sized businesses involved in tourism, promoting inbound tourism, and promoting domestic tourism.

## **9.5. Tajikistan**

### **9.5.1. Committee of Tourism Development**

The Committee of Tourism Development<sup>19</sup> was established under the decree "Resolution about the Committee of Tourism Development under the Government of the Republic of Tajikistan." It consists of one chairman, two deputy chairpersons, and four members and is financed by the state budget. It has 32 staff members at its headquarters in Dushanbe and 40 staff members in District, City, and other local governments.

The committee's main activities include preparing and implementing a tourism development plan, developing cooperative relationships with tourism-related organizations, implementing promotional activities for inbound tourism, and promoting domestic tourism.

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<sup>17</sup> <https://www.guides.kz/en/>; [www.facebook.com/groups/guides.kz](https://www.facebook.com/groups/guides.kz)

<sup>18</sup> <https://www.tstb.gov.tm/>

<sup>19</sup> [https://ctd.tj/en/home\\_en/](https://ctd.tj/en/home_en/)

### **9.5.2. Tourism Development Center**

Tourism Development Center<sup>20</sup> was the first non-profit organization established in Tajikistan in 2009 and will have four full-time employees in 2021.

The center has been involved in tourism development in Tajikistan. In recent years it has implemented projects such as the development and implementation of CBT tailored to Tajikistan's socio-economy, environmentally friendly and energy-efficient tourism (using UNDP funds), the publication of books on tourism in multiple languages, and the operation of an American cultural center (using US Embassy funds). The US Embassy funds also support the development and operation of the website.

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<sup>20</sup> <https://tourism.tj/index.php/en/>; <https://www.facebook.com/TourismDevelopmentCenter/>



## 10. International cooperation organizations related to tourism

This chapter summarizes the international organizations involved in the tourism sector in the five Central Asian countries. Since the primary sources of information collected are the websites of each organization and interviews in Uzbekistan and the Kyrgyz Republic, the following information is focused on Uzbekistan and the Kyrgyz Republic.

### 10.1. UNWTO

Uzbekistan became a member of UNWTO in 1993. Uzbekistan has a country office in Tashkent in MOTAS, and the other one is the Silk Road office in Samarkand, established in 2004.

MOTAS is actively working within UNWTO to ensure that Uzbekistan can play an important role in the tourism sector in Central Asia. The 24<sup>th</sup> Session of the General Assembly was held from 30 November to 3 December 2021. At the session, Uzbekistan was responsible for the Vice-Chairs elected from each region (Americas, Europe, and the Middle East), and the Minister of MOTAS, Mr. Abduhakimov, served in this position<sup>1</sup>. In addition, the Government of Uzbekistan has succeeded in bringing the 25<sup>th</sup> Session of the General Assembly to Samarkand, which will be held in 2023<sup>2</sup>. MOTAS is also working to attract conferences organized by UNWTO, such as Global Investment Forum and Global Youth Tourism Summit.

The Silk Road International Tourism University in Samarkand has signed an MOU with UNWTO. Although they do not have joint activities due to the pandemic, the university would like to organize events with UNWTO in the future, using the resources of the event management program on campus.

Meanwhile, UNWTO uses its educational institution (UNWTO Academy) to provide Uzbekistan with an online training program of four public and private sector experts. This training program is in four sectors: business recovery, packaging, marketing, and safety and health, with training taking place in September 2021<sup>3</sup>.

The Kyrgyz Republic does not have strong links with the UNWTO observed in Uzbekistan.

### 10.2. UNESCO

MOTAS is planning to upgrade the department on UNESCO, which was previously part of the Department of International Affairs, to an independent organization. This department will also include the department relating to architectural conservation, formerly part of the Ministry of Culture, and will be responsible for the following activities.

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<sup>1</sup> <https://www.unwto.org/event/general-assembly-twenty-fourth-session>

<sup>2</sup> <https://twitter.com/UNWTO/status/1466458213331652609>

<sup>3</sup> <https://www.unwto.org/uzbekistan-2021-open-call-for-experts>

- Monitoring and reporting on the progress of Uzbekistan's country-level action plan between the UNESCO's General Assemblies,
- Coordination between MOTAS and the Ministry of Culture on the protection of historical and cultural heritage,
- Study and implementation of a system for the conservation and utilization of architectural heritage, and
- Activities for awareness-raising to preserve archaeological sites.

Regarding historical buildings, during the time of the Ministry of Culture, the department focused only on preservation, but after the department was transferred to MOTAS, the emphasis will be on how to utilize the historical buildings for tourism. The department also believes that it is important to change the mindset of citizens and private companies so that they do not destroy the historical buildings.

In the Kyrgyz Republic, the National Commission of UNESCO is the point of contact with UNESCO. According to the interview with the National Commission, in Kyrgyzstan, UNESCO and the EU jointly implemented the project "Silk Road Heritage Corridors" to protect tangible and intangible cultural heritage. The project for the protection of tangible cultural heritage was to improve the site and install signs at the Krasnaya Rechka site, Ak-Besim site, and Burana Tower and Balasagun site in the World Heritage site "Silk Roads: the Routes Network of Chang'an-Tianshan Corridor." According to an interviewee from the National Commission, UNESCO had also organized seminars on tourism development of archaeological sites in the Kyrgyz Republic and other Central Asian countries.



Site Protection Facility at Kratinaya Rechka installed by UNESCO/EU



Explanation board of Ak-Besim site set up by UNESCO/EU

### 10.3. Central Asian Regional Economic Cooperation (CAREC)

As mentioned in sections 1.1 and 1.2, the Central Asian Regional Economic Cooperation (CAREC) has prepared plans such as the CAREC Tourism Strategy 2030, the Almaty-Bishkek Economic Corridor Tourism Master Plan.

CAREC is a regional cooperative development initiative with 11 member countries (Afghanistan, Azerbaijan, China, Georgia, Kazakhstan, Kyrgyzstan, Mongolia, Pakistan, Tajikistan, Turkmenistan,

and Uzbekistan) and six partners (ADB, IBRD, IMF, EBRD, IsDB, and UNDP). The six economic corridors and the energy sector are the main areas of cooperation, and The ADB has served as the secretariat since 2001.

MOTAS and DOT were not directly involved in the preparation of the above-mentioned tourism development strategies because the ministries directly related to CAREC are the Investment Department of MIFT and MEF, respectively, according to the interviews with both organizations.

In Uzbekistan, MIFT is expected to have a major role in implementing the projects and programs described in the CAREC Tourism Strategy 2030. On the other hand, DOTs are improving tourist safety and promoting a rating system for hotels based on the Almaty-Bishkek Economic Corridor Master Plan. Different organizations in charge of tourism seem to have different stances on implementing the tourism development strategy prepared by CAREC.

#### **10.4. USAID**

In the past, USAID's assistance to Central Asia has been provided at the regional level to five Central Asian countries based in Almaty, Kazakhstan, but in recent years, missions have been established in countries other than Turkmenistan, and USAID is moving toward country-level assistance<sup>4</sup>.

In recent years, USAID has provided the following assistance, including tourism, in Central Asia.

- Future Growth Initiative (FGI)
- Competitiveness, Trade and Jobs (CTJ)
- Business Growth Initiative (BGI)

The Future Growth Initiative (FGI) and Competitiveness, Trade, and Jobs (CTJ) are programs targeting five countries in Central Asia. The Business Growth Initiative is a program targeting the Kyrgyz Republic. Both FGI and CTJ select and implement assistance according to the needs of each country.

##### Future Growth Initiative (FGI)

The FGI<sup>5</sup> program is launched in October 2019 for five Central Asian countries, with key target sectors being tourism, ICT (building e-commerce platforms), and textiles. The program is scheduled to end in September 2024.

FGI is focusing on the tourism sector in Uzbekistan. The promotion of CBT is a theme in the tourism sector, and the program has begun to support CBT organizations in the regions of Samarkand, Bukhara, and Jizzakh. The program is also planning to expand the number of recipients of the supports in the future. The FGI program is also working with the Tourism and Hospitality Industry Committee of the

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<sup>4</sup> Although the supports are targeted at the five Central Asian countries, it has not actually been able to provide assistances to Turkmenistan.

<sup>5</sup> <https://www.usaid.gov/central-asia-regional/fact-sheets/usaid-central-asia-future-growth-initiative>

American Chamber of Commerce (AmCham) in Uzbekistan to invest in the industry and increase CBT tourism sales. The FGI program plans to support the tourism development in Muynak, Karakalpakstan Autonomous Republic, by promoting Muynak as a tourist destination and supporting the digitalization of tourism.

FGI is also providing tourism-related support to the carpet weaving center in the Bukhara Region to develop a system for e-commerce and export to Italy. The program also dispatches experts for quality improvement.

### Competitiveness, Trade and Jobs (CTJ)

The CTJ<sup>6</sup> program was launched in 2016 for five Central Asian countries<sup>7</sup> and is scheduled to end in November 2021. The target areas were initially (1) trade, (2) transport and logistics, and (3) horticulture, but (4) tourism was added in 2018. Support is also being provided to Uzbekistan to access the World Trade Organization (WTO).

In Uzbekistan, CTJ's tourism support was targeted at the government and large companies involved in tourism. Activities included lobbying for the launch of a charter flight from Tashkent to Issyk-Kul Lake, which has not happened due to the pandemic).

Since the global outbreak of the COVID-19, CTJ has supported regional-level marketing and promotional activities in Central Asia, aiming to revive the tourism industry in the five Central Asian countries and improve their connectivity to the global adventure tourism network. In 2021, CTJ supported a six-month social media marketing campaign<sup>8</sup>. CTJ is also working to develop soft and hard infrastructure and improve the capacity of tour operators and guesthouses to develop new tour products and enhance service delivery.

USAID is considering implementing a successor program to CTJ in Uzbekistan. Three of the five sectors will be selected for the successor program, with ICT, tourism, and SMEs most likely to be chosen.

### Business Growth Initiative (BGI)

The BGI<sup>9</sup> was a program that targeted only the Kyrgyz Republic and was implemented from August 2014 to June 2018. The areas of assistance were apparel, tourism, and construction materials. In apparel, the program provided support to sewing factories for export to Russia and Europe, and in construction materials, the program provided support to stone associations.

In the tourism sector, the following support was provided.

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<sup>6</sup> <https://www.usaid.gov/central-asia-regional/fact-sheets/usaid-competitiveness-trade-and-jobs-activity>

<sup>7</sup> As with the FGI, the CTJ has not been able to provide assistance to Turkmenistan. In addition, the CTJ was more focused on implementation in the Kyrgyz Republic and Tajikistan, as Uzbekistan and Kazakhstan have more developed economies.

<sup>8</sup> <https://usaiddcentralasia.exposure.co/building-a-stronger-central-asian-travel-brand>

<sup>9</sup> <https://www.usaid.gov/kyrgyz-republic/fact-sheets/business-growth-initiative>



- Support to DMOs in the southern shores of Issyk-Kul Lake, Karakol, Jyrgalang, and Osh: website development, office set-up and technical support by consultants,
- Installation of 200 signs,
- Development of 51 trekking routes,
- Installation of solar panels,
- Invited bloggers to take FAM trips,
- Working with the Adventure Travel and Trade Association (ATTA) to develop adventure travel operators and support their participation in international travel expos, and
- Support for developing nomadic cultural experience products at tourist sites such as falconry, local cuisine, felt making, etc.

USAID's assistance to the economic sector, including the tourism sector, attempts to provide the support that connects directly with the private sector through private-sector-led associations and the local US Chamber of Commerce. On the other hand, the nature of USAID's support is likely to be less visible to government agencies in each country.

## 10.5. HELVETAS

HELVETAS<sup>10</sup>, a Swiss international cooperation organization, has been active in the Kyrgyz Republic since 1994. Since 2002, it has contributed greatly to the development of CBT in the country by supporting the establishment of CBT associations at CBT tourist sites and the Kyrgyz Community Based Tourism Association (KCBTA).

At present, HELVETAS is implementing the following two projects.

- BaiAlai: Small Business and Income Creation Program,
- Winter Tourism Kyrgyzstan (WTK): Sustainable Winter Tourism Development Project, and
- GREEN TOUR: Sustainable Tourism in Kyrgyzstan.

The first phase of BaiAlai<sup>11</sup> took place from April 2014 to May 2018, and the second phase started in June of the same year. The second phase is expected to be completed in May 2022. The project is funded by the Swiss Agency for Development and Cooperation (SDC) and focuses on animal husbandry, beekeeping, handicrafts, and tourism.

In the tourism sector, the project supports small and medium-sized tourism operators in the two southern districts (Alay and Chon-Alay) of the Osh Region. It is also working with CBT associations in Osh and Alay and with local tour companies to support, for example, apitherapy, horse riding, and trekking

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<sup>10</sup> Positioned as an association under Swiss national law, the website is <https://www.helvetas.org/en/switzerland>

<sup>11</sup> BaiAlai is written as Bay Aray in the Kyrgyz Republic. <https://www.helvetas.org/en/kyrgyzstan/what-we-do/how-we-work/our-projects/Asia/Kyrgyzstan/kyrgyzstan-small-business>; <https://www.facebook.com/byalaybrand/>

businesses, and organizations that produce and sell handicrafts.

The WTK<sup>12</sup> has the pilot phase from April 2019 to March 2021 and will have the first phase from April 2021 to April 2025. The Swiss Government will finance the project (State Secretariat for Economic Affairs). The overall project is intended to be implemented until March 2029. The project aims to develop the value chain of tourism in the Kyrgyz Republic during the winter season. The project partners are the DOT, the Ministry of Emergency Situations, the Kyrgyz Mountain Guides Association (KMGA), the Kyrgyz CBT Association (KCBTA), the HoReCa Club (an association of hotels, restaurants, and cafes), and CSR Central Asia (the consultancy arm of the University of Central Asia).

The WTK pilot project activities were conducted in the southern suburbs of Bishkek, and the winter tourism potential areas around Karakol, where the potential for ski trekking, winter horse riding, and other tourism activities was identified. The project also includes training programs for small and medium scale tourism operators.

The GREEN TOUR<sup>13</sup> project is funded by the EU's Switch-Asia<sup>14</sup> and is planned to run from 2020 to 2024. HELVETAS is working to (1) integrate environmentally friendly services and products<sup>15</sup> into the tourism supply chain, (2) develop standards for waste management practices in hotels, restaurants, and tourist sites, especially for reducing food waste and plastics, and (3) promote the creation of new financial schemes and facilitate access to finance for SMEs together with the European Centre for Ecological and Agricultural Tourism (ECEAT) of the Netherlands, KATO, and KCBTA.

The project also focuses on promoting awareness of the Kyrgyz Republic as a green destination among international tourists and international tour companies.

HELVETAS has been supporting the tourism sector in Kyrgyzstan for more than 25 years, especially in the development of CBT. Although HELVETAS' cooperation in Kyrgyzstan has been long-term, its exit from cooperative projects has been well-timed, contributing to the fact that the organizations created by the projects have been able to operate sustainably using their resources.

## 10.6. EU and ACTED

The EU's support for the tourism sector in the five Central Asian countries is twofold.

- Silk-Road CBT initiative: Connecting Central Asian Community-Based Tourism and the European Market, and
- Switch Asia.

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<sup>12</sup> [https://www.helvetas.org/en/kyrgyzstan/what-we-do/how-we-work/our-projects/Asia/Kyrgyzstan/kyrgyzstan\\_wtk](https://www.helvetas.org/en/kyrgyzstan/what-we-do/how-we-work/our-projects/Asia/Kyrgyzstan/kyrgyzstan_wtk)

<sup>13</sup> <https://www.helvetas.org/en/kyrgyzstan/what-we-do/how-we-work/our-projects/Asia/Kyrgyzstan/kyrgyzstan-green-tour>;  
<https://www.switch-asia.eu/project/green-tour/>

<sup>14</sup> Switch-Asia is discussed in the next section.

<sup>15</sup> It means less energy consumption and also less carbon dioxide emissions.

The following sections describe these two programs.

The Silk-Road CBT initiative<sup>16</sup> is a program that will be implemented in Uzbekistan (lead country), Tajikistan, and the Kyrgyz Republic from January 2020 to January 2023, with the participation of stakeholders in Turkmenistan. The program's objective is to promote investment and private sector development and diversify economic activities by strengthening the CBT sector, which is identified as having the highest potential to stimulate inclusive economic growth. In order to achieve this objective, the program intends to enhance the competitiveness of CBTs by strengthening the ability of the associations to function as effective Business Intermediary Organizations (BIOs)

The EU is funding the program, and it is being implemented by ACTED, a French charity<sup>17</sup> with headquarters in Paris and 3,800 staff in 38 countries. American University, GIZ, and EBRD are also partners in the program.

Switch Asia is an initiative launched in 2007 and implemented in 24 countries in Southeast Asia, South Asia, and Central Asia, which aims to introduce sustainable consumption and production (SCP) in economic activities. The following three programs are relevant to the tourism sector in five Central Asian countries.

- Promoting energy efficiency and renewable energy production in the community-based tourism sector in Central Asia (SET),
- PERETO, and
- GREEN TOUR.

ACTED also implements the SET and will have a three-year implementation period from January 2020 to January 2023. The project aims to reduce carbon dioxide emissions in the CBT of the Kyrgyz Republic, Tajikistan, and Uzbekistan through the use of energy efficiency and renewable energy. The project's direct beneficiaries are more than 120 SMEs in the renewable energy sector, more than 315 CBT service providers, government agencies, local authorities, and government-sponsored organizations. The program will support SMEs in the renewable energy, energy efficiency, and CBT sectors to undertake sustainable consumption practices (SCP) and facilitate access to finance.

PERETO<sup>18</sup> is a program implemented only in the Kyrgyz Republic and is run by American University. The target is hotels, restaurants, and cafes (HoReCa), and the program aims to improve energy efficiency and reduce plastic waste.

As mentioned in the previous section, the GREEN TOUR is working on energy efficiency in the tourism supply chain, reducing food and plastic waste, and marketing and promoting the Kyrgyz Republic as a

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<sup>16</sup> <https://eu-cai.org/about-the-eu-central-asia-invest-programme/cai-grantees/currently-ongoing-projects/silk-road-cbt-initiative-connecting-central-asian-community-based-tourism-and-european-markets/>; <https://www.acted.org/en/projects/silk-road-cbt-initiative-connecting-central-asian-community-based-tourism-and-european-markets-2/>

<sup>17</sup> Organization registered according to the Association Française Loi 1901. <https://www.acted.org/en/about-us/governance/>

<sup>18</sup> <https://www.switch-asia.eu/project/pereto/>

green destination. HELVETAS implements the program.

## 10.7. Germany

GIZ's recent support to the tourism sector in five Central Asian countries includes the following projects.

- Uzbekistan: Strengthening sustainable economic development 2021-2023
- Tajikistan: Support of Tourism Sector/Handicraft Development 2007-2015
- Tajikistan: Promotion of Local Economy of Tajikistan 2016-2020
- Kyrgyzstan: Promoting Sustainable Economic Development 2014-2019
- Kyrgyzstan: Promoting green economy in Kyrgyzstan 2020-2023
- Kyrgyzstan: Rural development in Southern Kyrgyzstan 2018-2022
- Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, Uzbekistan: Establishing better framework conditions for climate-sensitive land use in Central Asia 2021-2024

According to the expert who was dispatched from the Center for International Migration and Development<sup>19</sup> (CIM) to MOTAS in June 2021, GIZ has closed its offices in the five Central Asian countries except for Uzbekistan, contrary to USAID's move. The expert was initially sent to the PR Centre to create German language content for the website and then to MOTAS to work on tourism product diversification. This expert completed his term in July 2021.

According to the expert, sequa gGmbH<sup>20</sup>, of which German business associations and GIZ are members and which supports the private sector, will send long-term experts to MOTAS, and the Import Promotion Desk<sup>21</sup>, which sequa gGmbH manages, will provide a matching service between Uzbek tour companies and tour companies in Germany and EU countries in the future.

## 10.8. Turkey

The Turkish Cooperation and Coordination Agency (TİKA), a Turkish aid agency, has actively supported Uzbekistan's tourism sector. TİKA previously assisted The State Tourism Committee (MOTAS's predecessor organization) in developing and managing its tourism promotion website and sent experts to MOTAS's Department of Marketing until June 2021. In addition, it organized training for tourism human resource education experts and restaurant and accommodation experts in April and October 2021<sup>22</sup>.

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<sup>19</sup> The Center for International Migration and Development is a joint initiative of GIZ and the German Federal Employment Agency, sending experts from within the EU around the world.

<sup>20</sup> <https://www.giz.de/en/aboutgiz/549.html>

<sup>21</sup> <https://www.importpromotiondesk.com/en/>

<sup>22</sup> [https://www.tika.gov.tr/en/news/turkey\\_shares\\_their\\_experience\\_in\\_tourism\\_with\\_uzbekistan-61801](https://www.tika.gov.tr/en/news/turkey_shares_their_experience_in_tourism_with_uzbekistan-61801); [https://www.tika.gov.tr/en/news/tika\\_helps\\_give\\_training\\_to\\_uzbekistani\\_tourism\\_experts-65964](https://www.tika.gov.tr/en/news/tika_helps_give_training_to_uzbekistani_tourism_experts-65964)

The Cooperation Council of Turkic-Speaking Countries<sup>23</sup> (Turkic Council), a consultative body of Turkic-speaking countries, was established in 2009, with Turkey, Uzbekistan, the Kyrgyz Republic, Kazakhstan, and Azerbaijan. Turkey, Uzbekistan, Kyrgyz Republic, Kazakhstan, and Azerbaijan participate in the council (Hungary is an observer). In June 2021, the 6th Tourism Ministers' Meeting was held in Kokand, Uzbekistan, where the Turkish Minister of Tourism expressed his continued support for constructing the Modern Silk Road<sup>24</sup>. In this context, Uzbekistan, the Kyrgyz Republic, and Kazakhstan are expected to receive support from Turkey.

### 10.9. KOICA

The Kyrgyz Republic DOT received a tourism marketing expert sent by KOICA for four months from late 2019 to early 2020. This expert had worked in Japan and South Korea and used his experience to advise the Kyrgyz Republic on tourism policy and was involved in activities to launch direct flights to South Korea and Japan. The expert also provided training for tour operators and conducted training in cooperation with a Korean company (Kyrgyz Friends<sup>25</sup>) involved in cultural tourism along the Silk Road.

### 10.10. JICA

JICA's support to the five Central Asian countries in the tourism sector can be summarized in Table 10.1. This section describes the OVOP project and the 3D Kyrgyzstan project in the Kyrgyz Republic.

**Table 10.1: JICA's support to the tourism sector in the Central Asian countries**

Subjects	Uzbekistan	Kyrgyzstan	Tajikistan	Kazakhstan	Turkmenistan
Tourism Policy	Dispatch of an expert "Adviser on tourism sector"	Support by the "adviser on tourism sector" in Uzbekistan			
Support for activities of tourism department (Information management, Public Relations)	JOCV (Samarkand, Bukhara, Khiva)	Follow-up of the training program "Tourism promotion through appropriate management of World Heritage sites" (support to the 3D Map development)	-	-	-
Local industry, local products	-	Technical cooperation project "One Village, One Product"	-	-	-
Urban and rural infrastructure and regional development for tourism development	-	Development study "Community development and tourism promotion project using the World Heritage sites in Chui Region"	-	-	-
Conservation and restoration of historical and cultural heritage	Training program "Tourism promotion through appropriate management of World Heritage sites"	Training program "Tourism promotion through appropriate management of World Heritage sites"			

<sup>23</sup> <https://www.turkkon.org/en>

<sup>24</sup> [https://www.turkkon.org/en/haberler/the-6th-meeting-of-the-ministers-in-charge-of-tourism-of-the-turkic-council-convened-in-uzbekistan\\_2272](https://www.turkkon.org/en/haberler/the-6th-meeting-of-the-ministers-in-charge-of-tourism-of-the-turkic-council-convened-in-uzbekistan_2272)

<sup>25</sup> <http://kyrgyzfriends.com/>

Subjects	Uzbekistan	Kyrgyzstan	Tajikistan	Kazakhstan	Turkmenistan
	Cultural grant project "Digital archiving cultural heritage"				
Ecotourism utilizing a natural resource	Training program "Sustainable and wise use of wetland resources that contribute to regional development including ecotourism"		Training program "Sustainable and wise use of wetland resources that contribute to regional development including ecotourism"		
Improvement of tour services and capacity development of a human resource for tourism	Study for the creation of new value-added services in tourism development (JTB)	Follow-up on "Human Resource Development for Hospitality and Tourism" (Seminar on hospitality and COVID-19 response)			

Source: Compiled by Mr. Naoki Nihei

Phase 1 of the OVOP project started in 2006 and is now in Phase 3. While phases 1 and 2 of the project focused on Issyk-Kul Region, Phase 3 covers the entire Kyrgyz Republic. In 2014, OVOP + 1 (OVOP plus one), responsible for product development, sales, quality improvement, and business matching, was established as a public union of the Kyrgyz Republic, and OVOP Association is responsible for the division of labor for production activities. The products include felt products, fruit juices, retort foods, soaps, etc. The project emphasizes using local materials from each producer so that the same product can be slightly different from one another.



Production activity of an OVOP association in Issyk-Kul Region



Felt products

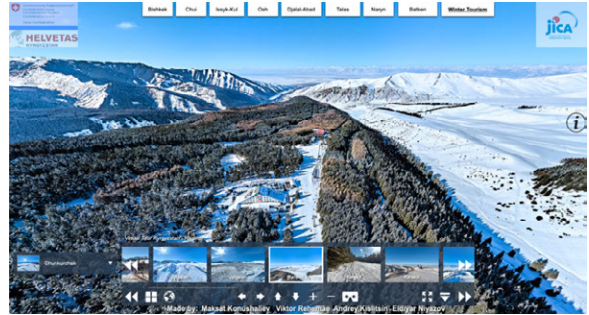
The OVOP project believes that it is very effective to have customers visit and experience the products to learn the background and value of the products before picking them up. For this reason, the project emphasizes cooperation with tourism.

The "3D Kyrgyzstan" project<sup>26</sup> is implemented by DOT, with the cooperation of JICA and GIZ, and sponsored by Kyrgyz private companies. This project links 3D views of major tourist sites in each region of the Kyrgyz Republic, and similar contents are being created in Kazakhstan and Tajikistan.

<sup>26</sup> <http://map.tourism.gov.kg/index.html>; <https://www.youtube.com/playlist?list=PLaqVCo2kHYYXBLwcbFNCM7qZpKXpdkWe5>



3D view from Brana Tower



3D view of Karakol ski resort in winter





## 11. Impacts of COVID-19 and countermeasures

### 11.1. UNWTO's analysis

According to UNWTO's World Tourism Barometer Volume 19, Issue 5, July 2021, the number of international tourists (overnight tourists) from January to July 2020 will be about 40% lower than the same period in 2019 and 80% lower than the same period in 2019 before the pandemic. Table 11.1 shows that the number of international tourism visitors worldwide declines from 1.46 billion in 2019 to 402 million in 2020, while the "Central/Eastern Europe" region, which includes the five Central Asian countries, declines from 153 million in 2019 to 47.2 million in 2020. In 2021, compared to the same period in 2019, the Central/Eastern Europe region experienced a smaller drop in international tourism in the first quarter of the year than the rest of the world and the whole of Europe, but since April, the reduction in international tourism has been larger than the rest of the world and the whole Europe. It means that the recovery of international tourism numbers has been slow in Central Asia.

**Table 11.1: Number of International tourists in the world**

Region	International tourist arrivals (million)		Percentage change 2021 over 2019 (%)*						
	2019	2020*	YTD**	Q1	Q2	April	May	June	July
World	1,466	402	-80.5	-87.5	-81.5	-85.9	-81.8	-77.3	-66.7
Europe	746.3	235.9	-76.9	-86.7	-80.5	-87.2	-81.6	-74.7	-57.6
Central/ Eastern Europe	153.2	47.2	-80.3	-83.9	-81.8	-83.8	-83.0	-78.9	-71.0

Note: \* Provisional data; \*\*Year to date (from January to July 2021)  
Source: World Tourism Barometer (Volume 19, Issue 5, July 2021), UNWTO

In addition, when UNWTO asked the experts of the UNWTO panel for their opinion on when the level of international tourism will return to the pre-pandemic level of 2019, not many respondents in the region, except for the Middle East, answered 2022. The responses were close to 2023 or 2024 or later (refer to Table 11.2). It is thought that the recovery of international tourism may also be slow.

**Table 11.2: Opinions on when international tourism will return to pre-pandemic levels**

Region	Unit: percent		
	2022	2023	2024 and over
world	11	43	45
Africa	seven	50	43
Americas	16	40	44
Asia/Pacific	eight	34	58
Europe	eight	49	43
Middle East	45	45	nine

Source: <https://www.unwto.org/news/vaccines-and-reopen-borders-driving-tourism-s-recovery>

### 11.2. Analysis of the WTTC Economic Impact Report

The WTTC's Economic Impact Report 2021 report referred to in section 3.1 compares pre-pandemic 2019 and 2020 figures for three indicators: revenue from international tourists, the tourism sector's contribution to GDP, and the tourism sector's contribution to employment. Table 11.3 summarises these figures for 2020 and the percentage decrease from 2019. Table 11.3 summarizes the statistics for 2020

and the percentage decrease from 2019.

**Table 11.3: International tourist receipts, tourism's contribution to GDP, employment and change from 2019 in 2020**

Country	International Tourism Receipt		GDP from the tourism sector		employment	
	2020 (USD million)	Percentage change over 2019 (%)	2020 (USD million)	Percentage change over 2019 (%)	2020 (000 persons)	Percentage change over 2019 (%)
Uzbekistan	308	-80	1,004	-64	495	-27
Kyrgyz Republic	199	-66	340	-57	169	-28
Kazakhstan	565	-80	3,906	-56	339	-23
Tajikistan	56	-68	275	-48	134	-23

Source: Economic Impact Report 2021, WTTC, 2021

Revenue from international tourists fell from the high 60s to 80 percent, value-added (GDP) created from the tourism sector fell from 48 percent to 64 percent, and employment fell from 23 percent to 26 percent. Although revenues from international tourists have dropped significantly, the impact on GDP and employment in the tourism sector is likely to have been mitigated as domestic tourism has provided some support.

### 11.3. Analysis and proposal of CAREC

According to "Impact of Covid-19 in CAREC Aviation and Tourism" (February 2021), prepared in cooperation with ADB, the tourism impact of the 10 CAREC countries is estimated as shown in Table 11.4. Although this analysis is based on the 10 CAREC countries, the statistics on airport users, which are broken down, suggest that the five Central Asian countries are also strongly affected by the COVID-19.

**Table 11.4: Impact of Covid-19 on the tourism industry of 10 CAREC countries**

Items	Impacts	Remarks
Number of passengers using the airport (total of international and domestic flights)	46 million fewer passengers	It is estimated that 74 million passengers used the airports in 2019; a 44% decrease in Kazakhstan, a 70% decrease in the Kyrgyz Republic, a 75% decrease in Uzbekistan, an 81% decrease in Tajikistan, and a 60% decrease in Turkmenistan.
Tourism and travel industry workers at risk of layoffs	One million people	Based on IATA's global-level estimates.
Tourism revenue from international tourists	11 billion dollars-decrease (8 countries)	In 2019, eight countries, excluding Afghanistan and Turkmenistan, recorded USD11.8 billion.
Contribution of the tourism and travel industry to GDP	Down \$27 billion	In 2019, eight countries, excluding Afghanistan and Turkmenistan, recorded USD38.2 billion
Number of international visitors	33 million fewer visitors	40 million visitors in 2019.

Source: Impact of Covid-19 in CAREC Aviation and Tourism, ADB

In light of this impact of COVID-19, the report makes the following recommendations.

- CAREC should promote domestic travel to facilitate the recovery of the aviation and travel sectors when international traffic has declined significantly.
- CAREC member states should consider opening a green lane<sup>1</sup> to promote travel and tourism

<sup>1</sup> The green lane means a mechanism that facilitates travel between countries in the CAREC region that have kept the spread of COVID-19 to a relatively low level. This is the so-called travel bubble.

within the CAREC region.

- CAREC Member States should consider implementing a visa-free policy to promote travel and tourism within CAREC.
- CAREC should improve air connections between countries during and after the pandemic.
- CAREC should consider offering incentives to support the opening of new routes linking major cities with tourist destinations in other CAREC countries.
- CAREC should take advantage of its strategic position between Asia and Europe to invest in increasing its air cargo handling capacity.
- CAREC should now liberalize the air cargo market to facilitate air cargo movement during the pandemic and air cargo growth in the coming years.
- CAREC should promote contactless ticketing and invest in technology to support digital procedures at airports.
- CAREC should adopt uniform standards and regulations for air travel under COVID-19.
- CAREC should consider providing financial support to airlines through loans and loan guarantees.
- CAREC should consider a unified support package for the airport and tourism industry through measures such as wage subsidies, tax breaks, and fee waivers.
- CAREC should consider alternative funding sources to offset the impact of reduced overflight revenues (revenues from airlines for transiting airspace).

#### **11.4. Uzbekistan**

In Uzbekistan, the promotion of domestic tourism was initiated by Presidential Decision No. 3514, "On measures for the accelerated development of domestic tourism," in 2018, before the COVID-19 outbreak, and the promotion of domestic tourism is one of the pillars of the Tourism Development Strategy for the period 2019-25. Domestic tourism by youth, women, businesses, and other groups was encouraged, and public holidays were set to make it easier to take consecutive holidays together with weekends; the goal was to increase domestic tourism generation from about 15.5 million in 2018 to 25 million in 2025.

In order to compensate for the decrease in international tourists due to the COVID-19, the Government of Uzbekistan further promoted domestic tourism by reducing taxes for companies that conducted company trips and promoting domestic tourism through the National PR Center. Tour companies that used to deal with international tourists shifted their focus to domestic tourists, and hotel discounts for domestic group tourists were also implemented, resulting in an increase in travel by young people, families, and groups of government employees.

As a result, large tour companies with affiliated companies such as accommodation facilities and transportation companies were able to compensate for the decrease in international tourists to some extent by attracting domestic tourists. However, some small and medium-sized tour companies, which

respond to the niche demand of international tourists, gave up the continuation of their business.

The Hoteliers' Association, founded by a group of medium-sized hotels, negotiated with the government to get financial support for hotels in a situation where they were losing money and succeeded in getting the hotels to delay the payment of their fixed costs to 2021. As this example shows, associations related to tourism are also taking steps to ensure the continuity of their members' businesses.

### **11.5. Kyrgyz Republic**

As a result of the spread of COVID-19, the border between the northern part of the Kyrgyz Republic and the Almaty Region of Kazakhstan was closed, preventing overland travel. This has led to a significant decrease in the number of international tourists traveling to and from Kazakhstan.

In the Kyrgyz Republic, although policy measures to promote domestic tourism were not taken as in Uzbekistan, the Department of Tourism felt the need to promote domestic tourism, and tour companies actively worked to expand the domestic tourism market. For example, tourism products with a price of 500 Kyrgyzstan soms (670 Japanese yen) per person, in which people from the Kyrgyz Republic can join, are now offered, and a weekend tour from Bishkek to Sary-Chelek Lake in Jalal-Abad Region is offered for 4,400 Kyrgyzstan soms (5,900 Japanese yen). As a result of these activities to promote domestic tourism by the public and private sectors, many domestic tourists were seen around Issyk-Kul Lake during the study team's visit to the Kyrgyz Republic in July 2021. Most of them were family tourists.

As seen in Uzbekistan, tour companies that have diversified into accommodation and transportation services have been able to compensate to some extent for the decline in international tourists with domestic tourists by expanding the domestic tourism market. However, small and medium-sized tour companies that have not diversified their operations have fallen on hard times.

## 12. Cooperation among local governments, universities, and private companies

The study team interviewed Japanese local governments, universities, and private companies to understand their collaboration in Central Asia. This chapter summarizes the information collected through the interviews and the possibilities for strengthening the cooperation in the future.

### 12.1. Cooperation among local governments

Table 12.1 shows the local governments in the five Central Asian countries and Japan engaged in inter-city cooperation and exchange, as well as those that became the host towns for the Tokyo Olympics and Paralympics.

**Table 12.1: Local governments engaged in cooperation and exchange and host towns for the Tokyo Olympics and Paralympics**

Country	The local government engaged in cooperation and exchange	Host town
Kazakhstan	-	Kashihara City and Nara Prefecture, Fukuoka Prefecture and Kurume City, Yuki City
Kyrgyz Republic	Yamanashi City, Hamura City	Kochi Prefecture, Hamura City, Yamanashi City
Uzbekistan	Nagoya City - Tashkent City Nara City - Samarkand City Nara Prefecture - Samarqand Region Maizuru City - Rishon of Fergana Region	Nagoya City, Takasaki City, Hidaka Town, Maizuru City, Suginami Ward
Tajikistan	-	Aomori City
Turkmenistan	-	Tendo City and Yamagata Prefecture

Source: Compiled by the study team from "About host towns" and "Light up host town project" on the Cabinet Office website.

The study team conducted interviews with local governments engaged in inter-city cooperation and exchange, focusing on their exchange history and activities, as well as prospects and challenges.

#### 12.1.1. Nagoya City and Tashkent City

The study team interviewed the International Exchange Division of the Tourism and Cultural Exchange Department of Nagoya City, which has a partner city agreement with Tashkent City. The results of the interview are summarized below.

##### Background

Since Uzbekistan's independence, Nagoya University has provided support for developing a legal system in line with a market economy for 30 years, and there have been exchanges between students and alumni who studied at Nagoya University from Uzbekistan and the citizens of Nagoya. Uzbekistan offered the City of Nagoya an exchange program. With the cooperation of the Ministry of Foreign Affairs of the Government of Uzbekistan, the City of Nagoya decided to start an exchange program with Tashkent. With the aim of "letting the citizens of Nagoya know about Uzbekistan," Nagoya City and Tashkent City signed a Partner City Cooperation Agreement on December 18, 2019, in terms of tourism

and cultural exchange.

### Activities

For COVID-19, exchange with Uzbekistan residents and students in Japan has been continued through the Friendship Association of Nagoya and Uzbekistan<sup>1</sup>. In FY2020, Nagoya City applied for a Cabinet Office project as part of the Paralympic host town project<sup>2</sup>.

Before the pandemic, there were charter flights from Chubu International Airport to Uzbekistan three times a year. The long-term goal is to establish regular flights between Chubu International Airport and Uzbekistan.



An event in 2019, "Tashkent meets Nagoya" (Nagoya City website <https://www.city.nagoya.jp/kankobunkakoryu/page/0000116542.html>)

### Prospects for future collaboration

Nagoya City is planning a human resource exchange program for high school students, which the Board of Education is considering. In addition, the city is seeking to expand into private sector collaboration and has informed the Embassy of the Republic of Uzbekistan in Japan that it will have a booth at the Nagoya Cross-Industrial Exchange Exhibition (Messe Nagoya) to be held in 2021. At the same time, the city is considering exchanges through the Zoo and Botanical Garden and Uzbek restaurants in Nagoya.

### Issues for future collaboration

Building relationships with private companies in Uzbekistan is an issue. Nagoya City has received a request from the Embassy of the Republic of Uzbekistan in Japan to stimulate business exchange and expects to understand the needs of private companies in Uzbekistan and build relationships with them.

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<sup>1</sup> The Friendship Association of Nagoya and Uzbekistan aims to deepen the friendship between Japan and Uzbekistan. <http://fanuz.jp/>

<sup>2</sup> <https://www.city.nagoya.jp/kankobunkakoryu/page/0000120091.html>;  
<https://www.city.nagoya.jp/kankobunkakoryu/page/0000120390.html>

Through the exchange program, the city could establish contacts with the Embassy of the Republic of Uzbekistan and government officials. Still, it could not establish relationships with private companies in Uzbekistan yet.

An interviewee from Nagoya City also mentioned the decrease in opportunities for exchange due to the pandemic as an issue. Before the COVID-19 outbreak, Global Silkroad Inc., which serves as the secretariat of the Friendship Association of Nagoya and Uzbekistan, had the opportunity to lead applicants from the Nagoya Junior Chamber of Commerce and Industry on a trip to Uzbekistan, but the Chamber's member companies were not interested in the economic aspects of Uzbekistan because it is a double-landlocked country.

Securing a budget for the exchange is also an issue for the future. In FY2020, the first anniversary of the signing of the Partner City Agreement, the International Exchange Division was able to set aside a special budget, but in the future, Nagoya City does not plan to set aside a budget for holding exchange events. For this reason, the International Exchange Division is looking into utilizing the JICA Grassroots Project. Although there are potential domestic partner companies to apply for this project, we have not yet been able to find a local partner company in Uzbekistan.

#### Needs from Tashkent City

The study team interviewed the Deputy Mayor of Tashkent City, the Deputy Director of the Tourism Department, and the Director of the International Relations Department at the city office on June 30, 2021. Tashkent City explained that based on an agreement with Nagoya City, they are playing videos and distributing printed materials to introduce Nagoya's culture on buses and train stations in Tashkent and that they are planning to hold a festival called "Nagoya Days" in Tashkent in 2021. In addition, Tashkent City hopes to expand the partnership agreement with Nagoya City to include not only tourism and cultural exchange but also economic fields.

It was suggested that the following initiatives could be taken as part of future exchanges with Nagoya City.

- Introduction of ICT equipment in museums to improve exhibitions, obtain visitor data, and avoid congestion of visitors.
- Improve the operation and maintenance of public facilities such as museums and parks. For example, how to outsource a part of the operations to the private sector.
- Support in the field of archaeological research and conservation of archaeological sites and restoration of architectural structures.
- Discuss the roles of the city government in inviting hotel investments and improving hotel services.

The Deputy Mayor also explained Tashkent's tourism activities, including the restoration of the 12 gates

of the city walls that existed in the past (one of them has already been restored), and the city's aim to invite international conferences and events.

### **12.1.2. Nara City and Samarkand City**

Nara City has concluded a memorandum of understanding (MOU) on inter-city exchange with Samarkand City in 2019. The following is the result of an interview with the Tourism Strategy Division of the Tourism and Economy Department of Nara City, which serves as the contact point for the exchange.

#### Background

When the Ambassador of Uzbekistan to Japan visited Nara City, the Mayor of Nara City was invited to the Oriental Music Festival of Uzbekistan. In August 2019, the Mayor of Nara City visited Samarkand City and signed a memorandum of understanding with the Mayor of Samarkand City to promote mutual exchange in education, culture, and tourism.

#### Activities

Due to the spread of COVID-19, the direct exchange has been difficult. In August 2021, a panel exhibition was organized to commemorate the second anniversary of the signing of the MoU, introducing famous places in Samarkand and the food culture of Uzbekistan<sup>3</sup>.

#### Prospects for future exchanges

Nara City focuses on cooperation in the field of education and plans to conduct exchanges between high schools in Samarkand and Nara City. When the mayor of Nara City visited Samarkand in 2019, he interacted with local high school students. As a result, he grasped that there is interest in science and Japanese technology.

In 2019, students from the school attached to Samarkand University participated in the Nara Sakura Science Camp<sup>4</sup> and attended a science and technology workshop at Nara Women's University through this program.

#### Issues for future exchanges

In order to deepen exchanges with Samarkand City in the future, Nara City recognizes that it needs a key person or contact person who has a wide range of connections in Samarkand City. However, Nara

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<sup>3</sup> <https://www.city.nara.lg.jp/site/kankou/120467.html>

<sup>4</sup> A science camp for Asian high school students to develop logical thinking skills and the ability to discuss and express themselves through science and technology workshops; until 2018, the Academy School affiliated with Tashkent University of Technology was participating from Uzbekistan.



City does not have the right person or means of communication, and this is a challenge for it.

The UNESCO Asian Cultural Center is located in Nara City. In the past, a training course on archaeology and cultural property conservation techniques was held here for Uzbekistan's cultural property staff, and cultural property staff from Nara Prefecture and Nara City participated as lecturers. In addition, Tezukayama University in Nara City is conducting archaeological research in Samarkand, so there are connections related to cultural properties, but Nara City is looking for ways to connect them to tourism.

On the other hand, the study team suggested that the fact that Nara is advertised as the "eastern terminus of the Silk Road" in Japan is hardly recognized abroad. It would be possible to send such a message to the people of Uzbekistan by promoting exchanges with Samarkand City. The interviewee from Nara City agreed with the idea.

### **12.1.3. Maizuru City and Rishton of Fergana Region**

Maizuru City began exchanges with Uzbekistan when it accepted internees from Uzbekistan at the port of Maizuru, which was a repatriation port after World War II, and served as the host town for the Uzbek wrestling and judo representatives at the Tokyo Olympics. The following is an interview with the Port Promotion and International Exchange Division of Maizuru City regarding the exchange with Uzbekistan.

#### Background

In January 2016, Mr. Sultanov Jalil, Director of the Japanese Internee Museum, visited the Maizuru Repatriation Memorial Museum, and this visit marked the beginning of exchanges with Uzbekistan. In June of the same year, Maizuru City was selected as the host town of Uzbekistan for the Tokyo 2020 Olympic Games. From the second half of 2016 to the first half of 2019, exchanges between Uzbekistan and Maizuru City were conducted at the citizen level and in connection with host town activities.

A Memorandum of Understanding (MOU) was exchanged in November 2019 between the Rishton of Fergana and Maizuru City on human resource development in the fields of (1) care and welfare, (2) industrial technology, and (3) tea cultivation.

Due to the spread of COVID-19, Maizuru City and Rishton will continue to interact online after 2020.

#### Activities

The civic exchange activities between 2016 and 2019 are shown in Table 12.2. The Tokyo Olympic Games host town hosted a preliminary training camp for a delegation of judo athletes from Uzbekistan from mid-July 2021. With the aim of creating a welcoming atmosphere in the city, Maizuru City held

the "Uzbekistan Exhibition in Host Town Maizuru" from the end of June to the end of August 2021, which could be viewed at various locations in the city and on the web<sup>5</sup>.

**Table 12.2: History of exchanges between Maizuru City and Uzbekistan.**

Year	Activities as a host town	Exchange of citizens
2016	Registration of the host town for Tokyo Olympic 2020	<ul style="list-style-type: none"> <li>- Visit by Mr. Sultanov Jalil, Director of the Japanese Internee Museum</li> <li>- Providing Uzbekistan's local cuisine (plov) at Maizuru city's high school cultural festival</li> <li>- Providing Uzbek food for school lunches at all elementary schools in Maizuru City</li> </ul>
2017	Observation of the Uzbekistan national wrestling and judo training camp teams	<ul style="list-style-type: none"> <li>- Appointment of Coordinator for International Relations (CIR) from Uzbekistan</li> <li>- Exhibition about Uzbekistan at Maizuru Red Brick Park</li> <li>- Visit Uzbekistan by a delegation led by the Mayor of Maizuru City</li> </ul>
2018	<ul style="list-style-type: none"> <li>- Host town action: Support for recycling Judo clothes</li> <li>- Visit and training camp for junior wrestling and judo teams of the National Olympic Committee of Uzbekistan</li> </ul>	Visit by Mr. Sultanov Jalil, Director of the Japanese Internee Museum
2019	Visit and training camp of the Uzbekistan Wrestling and Judo Athletic Teams	<ul style="list-style-type: none"> <li>- Visit by Nazirov-Ganichel, Head of Noriko Japanese School<sup>6</sup></li> <li>- Russian language course by Uzbekistan CIR</li> <li>- Visit Uzbekistan by delegations of Maizuru City and citizens</li> <li>- Visit and performance by the Uzbekistan Culture and Art Troupe</li> <li>- Visit of delegations from Rishton and Deputy Governor of Fergana Region, MOU exchange on human resource development</li> <li>- Visit of Rishton Regional Director s, Exchanges MOA on human resource development</li> </ul>

Source: Prepared by the study team based on the Maizuru City website, "Progress of Host Town Exchange with Uzbekistan," (<https://www.city.maizuru.kyoto.jp/kyouiku/0000005060.html>) and interviews conducted in May 2021.

Based on the Memorandum of Understanding (MOU) on human resource development exchanged in November 2019, efforts are currently underway in three areas. The objectives of the two sides in each area and the efforts to date are described below.

#### Development of human resources for care and welfare

There is a shortage of human resources for nursing care and welfare in Maizuru City, and Maizuru City hopes to solve the shortage of human resources by using the framework of the Foreign Technical Intern Training System and the Specified Skills System. On the other hand, the Uzbekistan side seems to consider working in Japan to be an attractive condition because of the good wages and treatment. Uzbekistan's demographic composition is predominantly young, and as of 2021, there will not be many needs for nursing care and welfare in Uzbekistan.

According to the interviews from the Maizuru City office, they visited Uzbekistan in February 2020 and held a briefing session for students and faculty of a nursing school. During the briefing, local students

<sup>5</sup> <https://www.city.maizuru.kyoto.jp/kyouiku/0000008686.html>

<sup>6</sup> In Rishton of Fergana Region, there is a private Japanese language school called Noriko Gakkyu, and one of the teachers at the school used to be from Maizuru City. (<https://globe.asahi.com/article/12150830>; <https://www.facebook.com/norikouzb/>)

seemed to be intrigued when they heard that the monthly salary is about 200,000 yen, but the interviewee recognized that it is necessary to provide sufficient explanation and information about the nature of nursing care work in advance. In addition, Maizuru City has established a system to support the development of human resources for nursing care and welfare by providing travel expenses to come to Japan and a job placement subsidy (150,000 yen).

#### Development of human resources for industrial technology

When Mr. Nazirov Ganicher, the principal of the Noriko Japanese Language School, visited Maizuru City, he visited the Kinki Polytechnic College Kyoto and was interested in its ability to provide detailed education in small groups. Maizuru City has started accepting graduates of the Noriko class in order to provide them with a career choice. Maizuru City hopes that the students will be able to revitalize the city by finding jobs in Maizuru after graduating from the Polytechnic College and that they will be able to contribute to the development of Uzbekistan's industries after returning to their home countries.

In 2020, four students from Noriko Japanese Language School took the entrance exam, and three of them passed. The original plan was for the students to come to Japan and enroll in April 2021, but they have not been able to travel due to the pandemic. Maizuru City will provide 150,000 yen to cover the travel expenses for the students to come to Japan and to prepare for their enrollment<sup>7</sup> and 15,000 yen per month for living expenses for two years<sup>8</sup>.

#### Cooperation in tea cultivation in Uzbekistan

In Uzbekistan, as in Japan, there is a custom of drinking tea, and Maizuru City is also working to cooperate in the cultivation of tea in Uzbekistan. Although the cultivation of tea is not expected to be easy in Uzbekistan due to the climate and soil, the city is collecting information, including examples of native and cultivated tea in Japan and other countries.

Both Kyoto Prefecture and Maizuru City have received high praise for their tea in national competitions. At the time the project was conceived, it was hoped that Maizuru tea would be used, but since it is more suited to the climate of Uzbekistan, a variety bred in Saitama Prefecture with high cold tolerance has been used.

The Maizuru City Office had planned to visit tea processing plants and private companies in Uzbekistan, but due to the Corona disaster, this has not happened. Tea saplings were sent to Uzbekistan in March 2021, and test cultivation began there. The long-term goal is to establish a tea cultivation method that is suitable for the environment of Uzbekistan and to achieve commercial production.

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<sup>7</sup>Apply for the Maizuru City Monozukuri Takaramono Nurturing Support Scholarship.  
(<https://www.city.maizuru.kyoto.jp/kyouiku/0000005282.html>).

<sup>8</sup>Maizuru City is collecting donations through hometown taxation to secure financial resources for its exchange program with Uzbekistan  
(<https://www.city.maizuru.kyoto.jp/kankou/0000000800.html>).

### Challenges on exchanges

One of the challenges of exchange with Uzbekistan is that the Uzbek side is not able to raise the necessary funds for exchange, which sometimes makes it difficult to deal with. In addition, it is important to provide sufficient explanations to the recipients in advance when accepting them for the development of human resources for nursing care and welfare and industrial technology so that they do not return to their home countries due to inconsistencies in their image after coming to Japan.

#### **12.1.4. Yamanashi City and the Kyrgyz Republic**

With regard to the exchange between Yamanashi City and the Kyrgyz Republic, the study team conducted an interview with the Kyrgyz Republic Human Resources Development Center (KRJC), which was commissioned by Yamanashi City to serve as an advisor. The following is a summary of the interview.

#### Background

Yamanashi City became the Paralympic host town of the Kyrgyz Republic, with the 18<sup>th</sup> host town registration on February 28, 2020. Prior to the registration as the host town, the Mayor of Yamanashi City traveled to the Kyrgyz Republic in January 2020 and signed a Memorandum of Understanding (MOU) on the host town with the relevant organizations.

Ambassador Mirlan ARSTANBAEV pointed out the need to equalize the scale of local governments for future exchanges, and the Kyrgyzstan side will need to select local governments for the exchange in the future.

#### Activities

The main activity is an online exchange through the host town project. In Yamanashi City, elementary school students in the city created a message of support for the Kyrgyz Republic Paralympic powerlifting team and published it on a video website<sup>9</sup>.

According to KRJC, Yamanashi City envisions a cultural exchange (student exchange), while the Kyrgyz Republic's position is that it would be better if the exchange is not burdensome, and some economic benefit can be expected. KRJC has made some proposals to Yamanashi City regarding the possibility of private sector collaboration<sup>10</sup> but has not been able to formulate any projects so far.

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<sup>9</sup> <https://www.city.yamanashi.yamanashi.jp/citizen/docs/10189137.html>

<sup>10</sup> KRJC is proposing technical exchanges in fruit tree cultivation and training in wine production between the two countries, taking advantage of Yamanashi City's wine production.

### Prospects for future exchanges

Yamanashi City is waiting for the Kyrgyz Republic side to select a sister city. The city office hopes to conclude a friendship city agreement in the fall as of May 2021.

### Issues for future exchanges

The issues facing Yamanashi City are human resources and funds. Up to now, young officials have been taking on the exchange activities concurrently with their regular duties, but if the activities become more active in the future, the workload is expected to increase.

### **12.1.5. Hamura City and the Kyrgyz Republic**

The study team conducted an interview with the Tokyo Olympic and Paralympic Preparation Office of the Hamura City Planning and General Affairs Department regarding the exchange with the Kyrgyz Republic. The following are the results of the interview.

### Background

Hamura City established the Tokyo Olympic and Paralympic Preparation Office in April 2016 and began preparations to accept training camps for the Tokyo Olympics and Paralympics. Hamura City attempted to conduct promotional activities and contacted the presidents of Judo federations in Central Asia (the Kyrgyz Republic, Turkmenistan, Tajikistan) in 2018. After receiving a reply from the Kyrgyz Republic, Hamura City proposed to support the implementation of pre-camps (Judo Grand Slam Osaka 2018, 2019 World Judo Championships) and the Tokyo Olympics from 2018 to 2020.

In July 2019, the Mayor of Hamura City visited the Kyrgyz Republic and signed an agreement with the Judo Federation of the Kyrgyz Republic to conduct a pre-camp for the Kyrgyz Republic's men's national judo team at the 2019 World Judo Championships and the Tokyo 2020 Olympic Games.

In addition, Mr. Ryo Mita<sup>11</sup>, a singer, supported the establishment of relations with the Kyrgyz Republic. Through Mr. Mita, the Kyrgyz Embassy in Japan and the Kyrgyz people in Japan expanded their network.

### Activities

Hamura City, as a host town, believes that it has the advantage of learning about culture and diversity by conducting human resource exchange through the acceptance of athletes. Hamura City office has

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<sup>11</sup> Mr. Ryo Mita is the honorary advisor to the Kyrgyz Republic-Japan Business Council and a member of the Board of Directors of the Japanese Institute of the Alabayev Kyrgyz National University. Hamura City has commissioned Mr. Mita to serve as a volunteer ambassador for friendship between Hamura City and the Kyrgyz Republic.

been involved in activities to introduce the culture of the Kyrgyz Republic<sup>12</sup> and to support the judo team<sup>13</sup>. Although there are some restrictions due to the COVID-19 infection, the city office hopes to continue online exchanges and other activities in the future.

Hamura City has also approached the Hamura Chamber of Commerce and Industry regarding private sector collaboration, but no actual activities have taken place. Hamura City is home to the Hamura Plant of Hino Motors, and there are many companies related to this plant; and the city has been accepting trainees from China and South America. Hamura City is also looking into the possibility of expanding exchanges with the Kyrgyz Republic by utilizing its manufacturing industry.



"Kyrgyzstan Men's Judo National Team Kyrgyzstan National Anthem Hospitality Project" (Hamura City website <https://www.city.hamura.tokyo.jp/0000014169.html>)

### Prospects for future exchanges

Through the past exchanges, the citizens of Hamura City and the Kyrgyz Republic have had the opportunity to get to know each other. In the future, Hamura City would like to increase the momentum of exchange among citizens of both sides and promote citizen participation. Hamura City office has confirmed that a small number of citizens are willing to accept homestay programs.

### Issues for future exchanges

After the Tokyo Olympic and Paralympic Games, the team in charge of promoting exchanges will be disbanded, and there are plans for another department to take over the exchange work. It was also pointed out that the mayoral election may affect the direction of exchanges.

## **12.2. Cooperation among universities**

Table 12.1 shows the major Japanese universities that have exchanges and collaborations with

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<sup>12</sup> Hamura City organized events such as a friendship concert, a special exhibition to introduce the Kyrgyz Republic, and a cultural introduction lecture. <https://www.city.hamura.tokyo.jp/0000013527.html>

<sup>13</sup> Although the pre-camp for the Kyrgyz Republic men's national judo team was cancelled, we made a cheering video for the athletes competing in the Tokyo Olympics and Paralympics. In addition, a cheering message book and a cheering message poster have been created. <https://www.city.hamura.tokyo.jp/0000014169.html>

universities in Central Asia. The study team conducted interviews with the University of Tsukuba, Nagoya University, and Wakayama University.

**Table 12.3: Japanese universities that have exchange and cooperation**

Name of University	Partners and local offices
University of Tsukuba	The University of Tsukuba established the Tashkent Office in the Tashkent State University of Oriental Studies in 2007 and the Almaty Office in the Kazakh National University in 2014. Through these offices, the university has established agreements with six universities in Kazakhstan, four in Uzbekistan, two in Kyrgyzstan, one in Tajikistan, and one in Turkmenistan.
Nagoya University	In 2005, Nagoya University established the Education and Research Center for Japanese Law within the Tashkent State Law University, and in 2010, it established the Uzbekistan Office to support not only Nagoya University but also other Japanese universities in their activities related to international students in Uzbekistan. Through the activities of this office, exchange agreements have been established with five universities in Uzbekistan and two in Kazakhstan. In addition, the Asian Satellite Campus Institute (ASCI) has been established to offer doctoral courses in education, law, and medicine.
Wakayama University	Wakayama University has exchanges with universities in Uzbekistan and Kazakhstan and has cooperated with Kazakh University of International Relations and Foreign Languages, Bukhara State University of Uzbekistan, National University of World Languages, Tashkent State University of Economics, Tashkent University of Architecture and Civil Engineering, University of World Economy and Diplomacy, Silk Road International Tourism University, and Institute of Management and Development Institute of Singapore.
Takasaki University of Economics	The Takasaki University of Economics has a cooperative relationship with Tashkent State University of Economics. The university has the Department of Tourism Policy, Faculty of Regional Policy, while Tashkent State University of Economics has the Master's Program (Tourism Specialty) and the International Tourism Faculty, so there is a possibility of exchange in the field of tourism. There is a possibility of exchange in the field of tourism.

Source: Compiled by the research team from each university's website

### 12.2.1. University of Tsukuba

The University of Tsukuba has partner universities in all five countries in Central Asia. In addition, local offices have been established in Tashkent, Uzbekistan, and Almaty, Kazakhstan, where faculty members work as part-time coordinators for the University of Tsukuba.

The study team interviewed the Nippon Foundation's Project for the Development of Japanese Human Resources in Central Asia<sup>14</sup> (NipCA) regarding the university's partner universities and projects in the region. The following is a summary of the interviews.

#### Background

Since 2000, in order to differentiate itself from other universities in the field of Russian language research, and because of the fact that the University of Tsukuba had been conducting area studies, it has developed exchange activities with the aim of "studying the former Soviet Union region. Therefore, the Russian language education at the university is "Russian language for studying the former Soviet bloc. In addition, the university envisioned an education and research strategy based on the two pillars of "Area Studies of the Former Soviet Union" and "Japanese Language and Japanese Studies" and has since established a network of inter-university exchange agreements throughout the former Soviet bloc, including Central Asia.

<sup>14</sup> For more information, refer to the NipCA project website <https://centralasia.jinsha.tsukuba.ac.jp/>

### Local Office

The University of Tsukuba has established local offices in Uzbekistan and Kazakhstan. The Tashkent Office is the university's first regional office in Central Asia. It was established in 2007 at the Tashkent State University of Oriental Studies. Tashkent was chosen because of its direct flights from Japan, the popularity of the Japanese language in Uzbekistan, and the fact that it was the academic Center of Central Asia during the Soviet era. In establishing the office, the university has received supports from Nagoya University and the Japanese Embassy in Uzbekistan.

The Almaty office was established in 2014 in the Kazakh National University. Almaty was chosen because it is the center of economic development in Central Asia. As a result of recent reforms in the educational system of the country's higher education institutions, the number of Western-style universities with high standards of education and research has been rapidly increasing. The city is expected to achieve academic development in the future.

### Activities

Starting in the FY 2019, the University of Tsukuba is implementing a global human resources development project targeting five Central Asian countries and Azerbaijan with a grant from the Nippon Foundation. The project collaborates between the Nippon Foundation, the Japan-Central Asia Friendship Association, and the University of Tsukuba to develop human resources who can contribute to achieving the SDGs and solving social issues in the region. The core of the project is a scholarship program for NipCA fellows<sup>15</sup> in the Master's program studying International Public Policy and Public Health, which covers all entrance fees, tuition, and living expenses. The maximum number of applicants is ten each year, and in FY2019, the project's inaugural year, a total of 125 applicants were received. Currently, eight fellows have been allocated to the International Public Policy degree program and two to the Public Health degree program. Fellows come from various backgrounds, including private companies and central government agencies.

Japanese students use their semester breaks to participate in language training abroad in Russian (including local languages). In addition, three to four students are sent to partner universities in Kazakhstan, Uzbekistan, and Kyrgyzstan every year as exchange students. In order to reduce the financial burden on the students, this project partially subsidizes the travel expenses for overseas training.

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<sup>15</sup> NipCA Fellow recipients will take a graduate school entrance examination, and after passing the examination, will be admitted to the International Public Policy Degree Program of the Graduate School of Humanities and Sociology or the Public Health Degree Program of the Graduate School of Comprehensive Human Sciences at the University of Tsukuba. The former takes one and a half years, and the latter takes two years to obtain a master's degree.



Kazakhstan, Uzbekistan, and Kyrgyzstan every year as exchange students. In order to reduce the financial burden on the students, this project partially subsidizes the travel expenses for overseas training. The predecessor of the NipCA project was a project of the Ministry of Education, Culture, Sports, Science, and Technology (MEXT), which was implemented from FY2014 to FY2018. The purpose of this project was for universities to build, strengthen, and develop the foundation of overseas networks in education. The University of Tsukuba implemented the "Global Education Program for Developing Multilingual Human Resources in Japan, NIS and Baltic Countries" (Ge-NIS). The main content of the program was to acquire language skills, practical skills, and global literacy through study abroad, training programs, and classes.

#### Collaboration with other universities and institutions

The University of Tsukuba, Hokkaido University, and Niigata University were commissioned by the MEXT as implementing agencies for the Japan Overseas Study Center Collaboration Promotion Project (Russia and CIS) in FY2018 and are mainly promoting recruitment projects for international students from the CIS to Japan. In particular, the University of Tsukuba is conducting recruitment activities in Uzbekistan in cooperation with Nagoya University. In Kazakhstan and the Kyrgyz Republic, recruitment activities are being conducted in cooperation with the local Japan Centers for Human Resource Development and diplomatic missions abroad.

#### **12.2.2. Nagoya University**

Nagoya University has academic exchange agreements with five universities in Uzbekistan and interdepartmental agreements with two universities in Kazakhstan. In addition to the Uzbekistan office, there are two related organizations in Uzbekistan (Education and Research Center for Japanese Law and Asian Satellite Campus Institute). The study team interviewed the International Relations Division of the Education Promotion Department at Nagoya University about the university's exchange activities. The following are the results.

#### Background

In 2000, the Graduate School of Law of Nagoya University concluded an exchange agreement with three universities in Uzbekistan (Tashkent State Law University, The University of World Economy and Diplomacy, and Samarkand State University). In the same year, Nagoya University began accepting students in law under JICA's Human Resource Development Scholarship Program to support the development of law in the former Soviet Union. This was because Nagoya University had a course that studied the laws of the former Soviet Union and had faculty members who specialized in Russian law (especially administrative law) and who could communicate in Russian. Many of the faculty members

who began their work in Uzbekistan had also studied Russian administrative law.

In 2005, the Education and Research Center for Japanese Law was established in the Tashkent State Law University. Graduates of the Center were accepted to the Graduate School of Law at Nagoya University. The establishment of the Center was a turning point in the exchange with universities in Uzbekistan.

A summit declaration during the former Prime Minister Abe's visit to Central Asia in 2015 prompted the university to promote exchanges in the field of engineering and law.

A summit declaration during former Prime Minister Abe's visit to the Central Asian region in 2015 prompted the university to promote exchanges in the field of engineering and law. To this end, a faculty member of the Graduate School of Engineering has been dispatched to the Tashkent State Technical University as Vice President. In 2019, President Shavkat Mirziyoyev of Uzbekistan visited Nagoya University and was awarded an honorary doctorate<sup>16</sup>.

#### Local centers and office

Nagoya University has a local office in Uzbekistan. The office was established under the financial support of the MEXT's Global 30 project for the development of internationalization centers and is currently operated by Nagoya University's budget. This office serves not only as a contact point for Nagoya University but also as a link between Japanese universities and universities in Uzbekistan, providing the Uzbek side with information on Japan in general, including study in Japan.

The Education and Research Center for Japanese Law<sup>17</sup> was established by the Nagoya University Graduate School of Law to conduct education and research on the law and politics of Asian countries. It has been fostering human resources to train practitioners and educators who will nurture the next generation of legal professionals. The Center is located in seven Asian countries (Uzbekistan, Mongolia, Vietnam, Cambodia, Myanmar, Indonesia, and Lao PDR), and Uzbekistan has the longest history of any of them. To date, 63 students have completed the program (as of October 2020), 29 of whom have gone on to study in the Master's program at Nagoya University Graduate School of Law. The program graduates are widely active in Uzbekistan's state institutions, research organizations, and private companies. Two Nagoya University faculty members are stationed in Uzbekistan, one to teach law and one to teach the Japanese language to study Japanese law.

The Nagoya University Asian Satellite Campus Institute<sup>18</sup> (ASCI) offers doctoral programs to career bureaucrats from Asian countries who wish to pursue a doctoral degree. As of 2021, satellite campuses

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<sup>16</sup> At that time, the goal of exchange between Nagoya University and Uzbekistan universities was set at 15 faculty members and 50 students each year.

<sup>17</sup> <https://cjl.law.nagoya-u.ac.jp/>

<sup>18</sup> <http://asci.nagoya-u.ac.jp/japan/>

have been established in six countries in Asia, with Uzbekistan's target educational fields being education, law, and medicine. The lectures are mainly given remotely, and the curriculum is to visit Nagoya University once a year to take the lectures. However, due to the spread of COVID-19, visiting Japan to attend lectures has been suspended.

### Activities

Nagoya University places a high priority on "academic exchange" and emphasizes free exchange between scholars of the two countries. The Uzbekistan office serves as a contact point for Japanese universities in Uzbekistan and also assists in building networks between Japanese universities and universities in Uzbekistan. Nagoya University also supported the agreement between Wakayama University and the University of World Economy and Diplomacy of Uzbekistan. Nagoya University also serves as the secretary of the Japan-Uzbekistan Presidents' Meeting and supports the Japanese speech contest for the entire Central Asian region.

Although it is rare for Nagoya University students to study abroad for a long period of time for the purpose of earning credits at partner universities in Uzbekistan, the university promotes exchange through short-term study abroad programs and training.

### Collaboration with other universities and institutions

Nagoya University is providing practical support for a project to accept international students in Uzbekistan, which is commissioned from the MEXT to the University of Tsukuba.

### **12.2.3. Wakayama University**

As shown in Table 12.3, Wakayama University has exchange agreements with seven universities in Uzbekistan and one university in Kazakhstan. The study team interviewed the International Exchange Division of Wakayama University, and the following is the result of the interview.

### Background

Wakayama University's exchange with Central Asia began in 2016-2017 when a development consulting firm proposed a partnership with Uzbekistan. Since then, the university has deepened its ties with Central Asia, especially Uzbekistan, through exchanges with Aziz Abduhakimov, the Deputy Prime Minister (in charge of tourism, sports, culture, and mass media) and Minister of Tourism and Sports, and participation in the Japan-Uzbekistan Rectors' Conference held in Tashkent.

### Activities

One of the features of Wakayama University's exchange with Uzbekistan is that student exchange and

joint research activities are being conducted in "Japanese Studies" and "Tourism Studies." As part of our efforts under the pandemic, the university has started ICT-based student exchanges with our partner universities in Uzbekistan. In cooperation with the partner university, preparations are underway to implement a COIL-type program<sup>19</sup> in which students from both countries can earn credits.

In 2020, an international symposium on Japanese language education will be held, with faculty members from Uzbekistan's partner universities taking the stage and actively interacting with researchers. The fact that Deputy Prime Minister Abduhakimov gave the opening remarks at the symposium and that nearly 200 viewers from 17 countries attended the symposium suggests that the symposium is attracting attention in Uzbekistan and worldwide.

In addition, the "Japanese Speech Contest by International Students," which Wakayama University organizes every year, was held online in 2020, with one student studying Japanese from each of its partner universities, the University of World Economy and Diplomacy of Uzbekistan and the State University of World Languages of Uzbekistan, taking the stage. The audience participation was about 100 people from 7 countries. Wakayama University plans to promote further exchange and short-term study programs between students based on the Japanese language and culture by making full use of ICT.

Wakayama University is also contributing to the tourism sector in Uzbekistan by collaborating with the National Tourism Development Committee (now MOTAS) to conduct an online lecture course entitled "Uzbekistan from Japan's Perspective, Japan from Uzbekistan's Perspective" (10 lectures in total) for Japanese language guides and other tourism industry professionals in October 2020.

### Local Office

Wakayama University does not have a local office but has established the "Wakayama University-Bukhara National University Tourism Education and Research Center" in Bukhara National University, one of the partner universities in Uzbekistan.

### Cooperation with other universities and institutions

Information is shared with Nagoya University as needed. Wakayama University participates in the annual Japan Education Fairs held by the Asian Satellite Campus Institute of Nagoya University in Tashkent. Outside of the university, there are networking opportunities through events held by the Embassy of Uzbekistan in Japan.

## **12.3. Private sector collaboration**

Among the companies conducting private sector partnership projects in Central Asia, the study team

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<sup>19</sup> A COIL (Collaborative Online International Learning) type program is an online international interactive educational program.

interviewed the companies listed in Table 12.4. The following summarizes the information collected during the interviews, focusing on the connections with the Central Asian region, the background to the start of the project, and the challenges of implementing the project.

**Table 12.4: Private companies interviewed.**

Area of cooperation	Target countries	Name of companies
Disaster prevention and disaster management	Kyrgyzstan and Tajikistan	Tokyo Rope Mfg. Co., Ltd
Agriculture	Kyrgyzstan	Wakabayashi-shokai
Vocational training and industrial development	Uzbekistan	JTB Corporation
Environment and energy	Mongolia*	Excelsior Inc.

Note: \* Although the target country was not in Central Asia when the research team conducted interviews with domestic travel agencies, it was pointed out that one of the issues in the region is toilets when traveling by car. Excelsior has been working on eco-friendly toilets in Mongolia and Bolivia, so the study team added the company to the list of interviewees.

Source: Study Team

### 12.3.1. Tokyo Rope Mfg. Co., Ltd

Tokyo Rope provides wire rope products and related material, process, and engineering technologies. The company has affiliates in Kazakhstan (Tokyo Rope Almaty LLP) and the Kyrgyz Republic (Tokyo Rope Construction and Mining Company LLC) in Central Asia. The two projects in Central Asia were selected as part of JICA's private-sector partnership program for FY2019. As of May 2021, when the study team conducted an interview, these projects were in the process of contracting. Tokyo Rope also has experience in implementing the "Road Disaster Prevention Promotion Project (Countermeasures against Falling Rocks)" in Georgia<sup>20</sup>.

The Kyrgyz Republic is the target country for the "Road Slope Disaster Mitigation Promotion, Demonstration and Business Development Project," and the Tokyo Rope is participating as a supporting member of SANGO HOKKAIDO Co., Ltd. This project aims to produce and sell metal nets for preventing falling rocks in Kyrgyzstan. The other one is the "Case study of facilities to prevent slope disasters on roads" in Tajikistan. The study aims to demonstrate the effectiveness of the company's two products in road disaster prevention and lead to business development.

#### Connections with Central Asia

In addition to Kazakhstan and Kyrgyzstan, Tokyo Rope has two business bases in Russia. The first connection with Russia and the CIS countries came about when a JICA expert stationed in Kazakhstan asked for advice on measures to deal with falling rocks in the Central Asia region. The company then hired Central Asian personnel as employees, and business expanded as they became involved in road disaster prevention in connection with the Sochi Olympics held in 2014.

The company established a local corporation rather than a local office because (1) the government wanted to promote local production for local consumption, and (2) it could be established relatively quickly without requiring a large initial investment.

<sup>20</sup> [https://www2.jica.go.jp/ja/priv\\_sme\\_partner/document/530/1502082\\_summary.pdf](https://www2.jica.go.jp/ja/priv_sme_partner/document/530/1502082_summary.pdf)

### Background of the proposal for the private sector partnership project

Kyrgyzstan's "Dissemination, Demonstration, and Business Development Project for Road Slope Disaster Prevention" received a request to participate in the private sector partnership project via a party involved in the improvement project of Bishkek-Osh Road and avalanche countermeasures. The use of wire mesh is a major countermeasure against falling rocks in Japan, and the Tokyo Rope would like to popularize it in Central Asia as well. The five countries in Central Asia are all mountainous regions, and they all have issues with road disaster prevention. The Tokyo Rope is also considering the possibility of using wire mesh for grazing, if possible, since the market for rockfall prevention alone is small.

Since Tokyo Rope products are already being used in other technical cooperation projects in Tajikistan, the company would like to use this survey as an opportunity to promote our products and develop them into a business regarding the private sector partnership project in the country.

### Potential of road disaster prevention in Kyrgyzstan

The study team interviewed Tokyo Rope Construction and Mining Company LLC (TRC), a subsidiary of Tokyo Rope in the Kyrgyz Republic, on July 14, 2021. TRC was established in 2018, and its purpose is to train professionals to install wire mesh for road slope disaster prevention. TRC was established in 2018, and the purpose of the company was to train professionals to install wire mesh for road slope disaster prevention. TRC employs three people in the Kyrgyz Republic and provides them with three months of training in Japanese language and business manners at the Japan Center in Bishkek, followed by another three months of on-site training in Japan. They are also dispatched to the Philippines, Kazakhstan, and Sri Lanka to acquire skills through on-the-job training.



Source: TRC's presentation material

**Figure 12.1: Location of wire mesh for road slope disaster prevention**

In Bishkek-Osh Road, TRC plans to install wire mesh at one point. Outside the private-sector partnership project framework, TRC is planning to install wire mesh at more points through yen loan projects.

In addition to the Bishkek-Osh Road, the other areas in Kyrgyzstan with high needs for road slope disaster prevention are around the Bohm Valley from Bishkek to Issyk-Kul Lake and the Ala Archa National Natural Park in the southern suburbs of Bishkek.

### Challenges in conducting business in Central Asia

As both projects were in the process of contracting at the time of the interviews, the study team asked the interviewees from the Tokyo Rope what they felt were the issues after the extensive experience in Central Asia. The interviewees raised the following points.

- In the Kyrgyz Republic, the management of local companies is weak. In many cases, the company's financial status is not disclosed at the time of the transaction, leaving uncertainty in terms of license contracts, etc. As a result, there are concerns about collecting payments for private sector projects, excluding ODA projects. In addition, it is generally difficult to collect payments for even public works projects in the Kyrgyz Republic, and local companies are not willing to pay for them due to low profits.
- In Tajikistan, the country's president has been in office continuously since the country's independence, and it is necessary to consider the local ties and personal connections when conducting business.
- The preferential treatment (visa exemption/simplification, taxation, special economic zones, etc.) that Japanese companies want to receive for doing business in the region is difficult for the Central Asian governments to understand the ultimate effect (increase in the number of companies entering the region, etc.). For local people, they feel why Japanese investment is not progressing even though the business environment is being developed. On the other hand, microfinance and fintech are gaining momentum globally in the region.

### **12.3.2. Wakabayashi-shokai**

Wakabayashi Shokai is a trading company specializing in selling food additives, including seasonings, mainly in western Japan. It deals in licorice and stevia, which are raw materials for sweeteners. Tsukumo Corporation, which participated in the "Basic Study on the Commercialization of Esparcette Honey," also participated in the interviews conducted by the research team. Tsukumo Corporation is selling Esparcette honey online<sup>21</sup>.

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<sup>21</sup> <https://tsukumo-za.co.jp/product-esparcettehoney/>

### Connection to the Kyrgyz Republic

Wakabayashi-shokai used to import licorice from Xinjiang Uygur Autonomous Region in China. However, as the licorice resources in the region were being depleted, the company considered Kazakhstan, the Kyrgyz Republic, and Tajikistan in Central Asia as new importing countries and visited the Kyrgyz Republic, which had the highest business potential. The Japanese interpreter at that time was the reason for the company's connection with the Kyrgyz Republic. The relationship with this interpreter has continued to this day, and the person is now the company's contact person in the Kyrgyz Republic.

### Background of the proposal for the private sector partnership project

After receiving an inquiry about honey from a business partner in Japan, Wakabayashi-shokai conducted a survey in the Kyrgyz Republic. In Kyrgyzstan, there is Esparcette grass growing wild in Issyk-Kul Region, and people in the region produce Esparcette honey. When the Wakabayashi-shokai consulted with JICA about the project in the Kyrgyz Republic and the export of honey, JICA introduced the company about the private sector partnership project, which led the company to propose the project to the private sector partnership scheme.

Through the research in the Kyrgyz Republic, the company recognized that food hygiene and quality control needed to be improved, and the company used JICA's private sector partnership scheme to solve these issues. The company worked independently on sales methods and marketing.

### Challenges on developing the business

In Kyrgyzstan, there is a tendency to focus on quantity rather than quality. It was necessary to explain the importance of quality and quality control to producers of Esparcette honey and others. It was necessary to explain the importance of value addition, saying that high-quality products can also be bought by buyers (Japanese consumers in the case of this project) for high money.

In comparison to Japanese businesses, there was a strong lack of awareness of keeping promises. There were differences in business practices, such as selling products to visitors before the promised date even when doing business with them<sup>22</sup>. In addition, the Central Asian region had a dry climate and little knowledge about molds. On the other hand, Japan, the shipment's destination, has high humidity, so it was necessary to share knowledge about mold.

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<sup>22</sup> In Central Asia, business practices are bazaar-like and the way of thinking about inventory and product management is different from Japan. In Japan, inventory may be kept even at a loss for the sake of business partners and customers, but in Central Asia, the company sells what it owns and does not carry inventory.





Tsukumo-za website (<https://tsukumo-za.co.jp/product-esparcettehoney/>)

#### おすすめオーガニックはちみつ

##### -best 1、TUKUMOZA エスパルセットハニー(ESPARCETTE HONEY)

中央アジアにあるキルギス共和国のはちみつです。

キルギス共和国は標高1500m以上、4割が標高3000m以上に位置する山岳国で、その土地の恵を活かした養蜂が行われています。

中でも、有名なのがエスパルセットを標榜とするはちみつです。

エスパルセットは、和名はイゴマメ、ヨーロッパと称ばれるマメ科の高山植物で、天山山脈の麓の高標地帯に完全無農薬で育ちます。しかも、エスパルセットは瓶の右に空気の量を認めることができ、季節がわり替わってもそのまま長期という有機肥料になります。

「TUKUMOZAエスパルセットハニー」の標榜地であるキルギスの天山州は標高が高く、昼夜の温度差が大きく乾燥しているため、害虫がいないため農薬など無縁の地です。



Introduction of Esparcette homey (<https://tsukumo-za.co.jp/category/article/column/>)

### 12.3.3. JTB Corporation

JTB Corporation is Japan's largest and one of the world's leading companies in the travel industry. In recent years, JTB has been engaged in regional revitalization, hometown taxation, corporate solutions, social business, global business, etc. Based on its travel industry expertise, it has been actively engaged in M&A and business investment beyond the boundaries of the industry. The company is shifting its overall business domain from the traditional general travel business to the cultural exchange business.

JTB implemented a JICA's private sector partnership project, titled "Case Study for Establishing New Value Creation Services in Tourism Development," in Uzbekistan from August 2019 to June 2021. This project aimed to establish a tourism business that would lead to the revitalization of the local community and create employment and increase the residents' income by conducting the study, consulting services, and tourism education to the government officials and tourism industry workers in Uzbekistan.

Initially, JTB planned to establish a DMO in Bukhara and create tours that would benefit the local community. However, in the course of the project, JTB recognized the need to develop human resources for tourism before establishing a DMO. JTB proposed the possibility of education and human resource exchange targeting the Ministry of Tourism, business operators, and students by utilizing JTB's experience in training in Japan, school facilities<sup>23</sup>, and human resources.

#### Background of the proposal for the private sector partnership project

JTB has conducted surveys and projects in the tourism sector in Palestine and Tunisia and decided to apply for the private sector partnership project scheme because the company could use its experiences.

#### Challenges on developing the business

The biggest challenge is to obtain a budget to continue the project in Uzbekistan, as it is difficult to secure a budget for the development of human resources for tourism through MOTAS, and JTB is

<sup>23</sup> JTB operates the JTB Travel & Hotel College. <https://www.jtb-college.ac.jp/>

considering using funds from universities, other countries, and international organizations. In addition, it is necessary to develop a business model for how JTB can earn profits from the project.

Uzbekistan has many tourism resources with potential. It is necessary to prepare opportunities for Uzbek people to become aware of the tourism resources of their own country. Since the JTB's project is related to tourism development, the study team also interviewed JTB about the issues in the tourism sector. The results are summarized in Table 12.5.

**Table 12.5: Challenges in the tourism sector in Central Asia**

Challenges	Contents of the challenges
Access	<ul style="list-style-type: none"> <li>- There are few direct flights between Japan and Uzbekistan.</li> <li>- The number of domestic flights in Uzbekistan is small, so it takes time to travel within the country.</li> <li>- It is inconvenient to transfer between international and domestic flights in Tashkent.</li> <li>- During the winter season, there are many flight cancellations and delays due to bad weather.</li> </ul>
Tourism Infrastructure	<ul style="list-style-type: none"> <li>- Toilet facilities need to be improved in rural areas.</li> <li>- Wi-Fi connection in hotel facilities is unstable.</li> </ul>
Tour products	<ul style="list-style-type: none"> <li>- Tashkent, the capital city, is a beautiful and well-maintained city, but it has fewer attractions than Bukhara and Samarkand.</li> <li>- It is not possible to switch on and off during the tourist season. Effective use of the off-season is desired.</li> <li>- The local food is mainly meat dishes with a lot of oil, which is difficult for Japanese tourists to accept.</li> </ul>
Human Resource Development	<ul style="list-style-type: none"> <li>- There is room for improvement in the hospitality of tourism industry workers.</li> </ul>
Competing countries	<ul style="list-style-type: none"> <li>- Turkey is a competitor as a tourist destination. Turkey is a competitor as a tourism destination, and it has many PR elements to promote to other countries, such as exotic image and gastronomy.</li> </ul>
Business practice	<ul style="list-style-type: none"> <li>- The speed of business decision-making and communication in Uzbekistan is very fast, and Japanese companies, which need time to make decisions, need to be in tune with the customs of Uzbekistan.</li> </ul>
PR to the Japanese market	<ul style="list-style-type: none"> <li>- The five Central Asian countries are unfamiliar to Japanese people, and it is necessary to appeal to them through TV and other media.</li> <li>- It is necessary to provide information on each country, not only at travel expos but also at events to introduce culture and food.</li> </ul>

Source: Study team

#### 12.3.4. Excelsior Inc.

Excelsior Inc. has established technology for sanitizing and deodorizing toilets using only a processing agent, utilizing its dioxin decomposition technology. The company develops and sells portable toilets, toilet disposers, and other living environment products such as medical, nursing, and daily products. In FY2015, Excelsior was selected by JICA for a private sector partnership project, "Basic Survey on the Project to Improve Sanitation Environment by Introducing Eco Toilets in Mongolia," and conducted the study.

Although Excelsior has not developed business in Central Asia, the study team interviewed the company about the outline of its eco-toilet products, the experience of basic study in Mongolia, and issues the company has faced through its experiences in other countries.

Excelsior's main products are the portable toilet, "Ho! Toilet," and the temporary toilet, "Mt. Fuji Toilet." The Hot! Toilet is a portable toilet with a poncho, so even women can use it without hesitation.

While other companies' portable toilets sprinkle chemicals on the excrement after use, Excelsior's product has tablet chemicals in the container beforehand, making it easy to dispose of after excretion.

The Mt. Fuji Toilet is a simple toilet that uses chemicals to solidify excrement and prevent bad odors from occurring. There is no smell, and the solidified waste is simply thrown away. In a demonstration experiment in Mongolia in FY2015, more than 700 people used the toilet at the Naadam, a summer event in Mongolia, but no bad odor was generated. The system can also be used during nighttime events in the winter, demonstrating that it is resistant to temperature changes.



Products of Excelsior Inc.: Ho! Toilet (left) Mt. Fuji Toilet (right)  
Excelsior website <https://www.excelsior-inc.com/products/>

The main feature of the company's product is that it can sanitize and treat excrement with just a processing agent, and the soil after treatment can be used for agriculture and planting. Ho! Toilet and Mt. Fuji Toilet both do not require electricity or water, making them suitable for use in mountainous areas and island countries.

As examples of introducing this technology in tourist areas, Mount Norikura, the fifth station of Mount Fuji, and Mount Myoko can be mentioned in Japan. The strength of Excelsior's technology is that existing toilet facilities can be used as they are in mountain lodges. An example from overseas is the Salt Lake Uyuni in Bolivia. At Salt Lake Uyuni, the company is experimenting with a new business model. The company has partnered with a local tour company to include portable toilets in the price of the tour. The bus is equipped with a tent and a toilet seat, which is assembled and used during breaks. Of the 2,000 Japanese yen spent on a single toilet, 1,000 Japanese yen is donated to the local government to be used by quinoa farmers in the surrounding area for soil preparation. Excelsior's experience in building relationships with tour companies and farmers in the surrounding area can be used as a reference for other tourism development projects.

Excelsior is also focusing on collaboration with medical care and is conducting joint research with Chiba University Hospital to prevent infection and nosocomial infections. The company is improving existing

products under the supervision of experts in bacteriology and virology.

#### Challenges on the eco-toilet business

When exporting to Central Asia, high transportation costs may lead to price hikes of portable toilets and medicines, but costs may be reduced by devising transportation methods, such as transporting the products by consolidated flights. As for the cost issue, if the products are used for tourism, pay toilets could be considered.

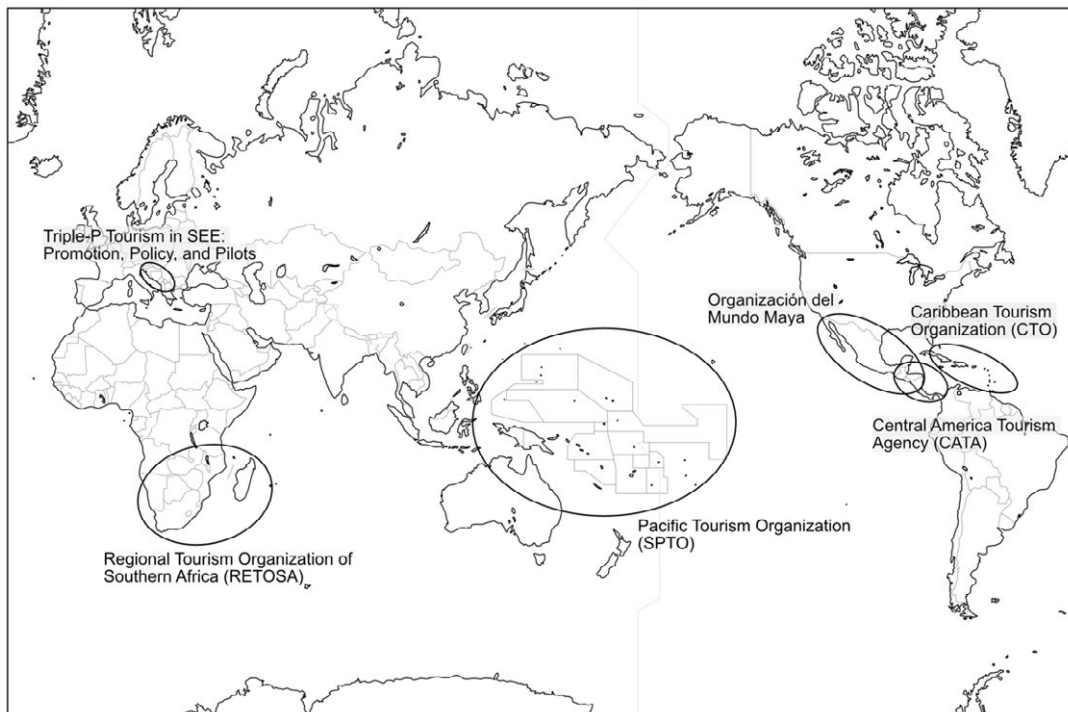
Toilet maintenance is another issue. In Norikura Kogen, the tourist association is responsible for maintaining the toilets. The tourism association pays a small fee to the maintenance workers, but the company feels that the community's strength keeps the work going. Excelsior believes that it may be necessary to add financial incentives to maintenance, especially in developing countries.

## 13. Analysis of tourism development and promotion through regional cooperation

This chapter analyzes the case studies of cross-country tourism development and promotion and the organization, activities, and budgets of DMOs in Japan. It draws lessons that can be applied to regional tourism development and promotion in the five Central Asian countries to be examined in Part 2, Chapter 2.

### 13.1. Tourism development and promotion across-countries

This section deals with six regional tourism development and promotion projects and organizations worldwide. The location of each project or organization is shown in Figure 13.1.



Source: Compiled by the study team from the websites of each project and organization

**Figure 13.1: Location of the six tourism development and promotion projects and organizations**

#### 13.1.1. Triple-P Tourism in SEE: Promotion, Policy, and Pilots

Thirteen countries in the Balkans and the surrounding region, and the countries, regions, and international organizations that support them, form the Regional Cooperation Council (RCC). This organization aims to promote regional cooperation among the 13 countries and, in the future, to strengthen ties with the EU.

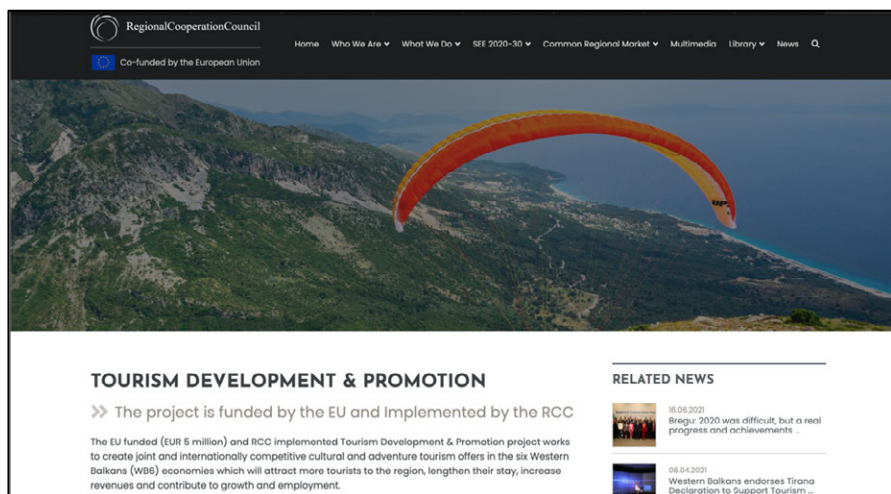
One of the RCC's major projects is a regional-level tourism project for six countries<sup>1</sup> in the Western

<sup>1</sup> Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia, Serbia

Balkans, Triple-P Tourism in SEE: Promotion, Policy, and Pilots, implemented on a three-year schedule starting in December 2018. The project is funded by the EU's Instrument for Pre-Accession Assistance (IPA), which assists countries seeking future accession<sup>2</sup>.

The project aims to develop sustainable tourism and increase employment in the Western Balkan region by (1) analyzing and reporting on the local tourism value chain, (2) creating cross-country cultural and adventure tourism routes and marketing them to international tourists, (3) identifying obstacles for local-level tourism development and examining solutions, (4) examining ways to promote local-level tourism development through the implementation of pilot projects, and (5) promoting local tourism products and brands.

Even before implementing this project, the RCC has been emphasizing the tourism sector in its support to the industry and has organized a Technical Working Group (SSE TEG) with representatives from the governments of the member countries, the private sector, and supporting organizations. They may have been involved in the implementation of this project. The SSE TEG does not seem to be a full-time organization but rather formed on an as-needed basis.



RCC's Triple-P Tourism in SEE: Promotion, Policy, and Pilots website

The tourism development projects in the six Western Balkan countries are similar to the draft regional tourism development strategy described in Part 2 of this report. The formation of a project-based organization (SSE TEG), rather than establishing a permanent organization or department for the implementation of the regional tourism development strategy, is helpful in considering the organization of regional tourism development in Central Asia. On the other hand, it also suggests that in order to implement such a project, financial support from a strong development partner such as the EU will be necessary.

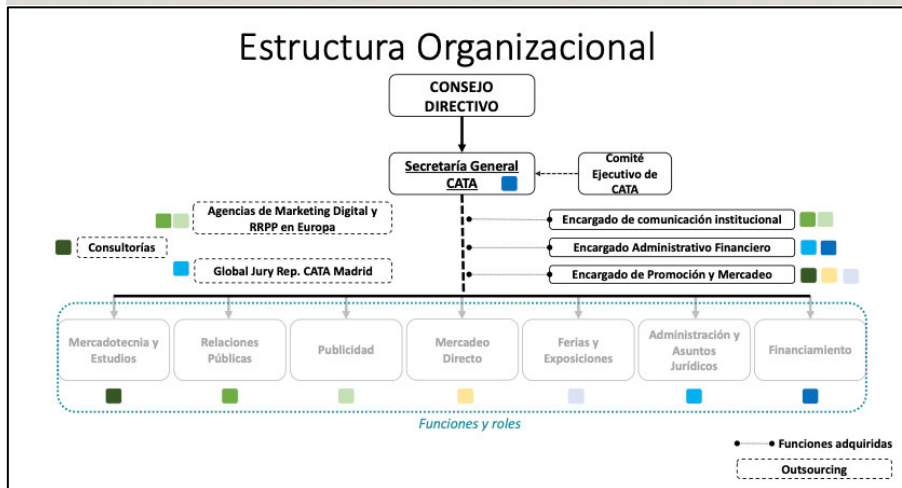
<sup>2</sup> <https://www.rcc.int/tourism>

### 13.1.2. Central America Tourism Agency

The Central America Tourism Agency<sup>3</sup> (CATA) is a regional tourism organization with eight countries<sup>4</sup> in Central America. These eight countries form the Sistema de la Integración Centroamericana (SICA), which aims to promote regional socio-economic integration, and CATA is a joint public-private organization to attract overseas tourists to Central America.



CATA Web site



Organization of CATA

CATA does not develop tourism products but promotes private-sector-driven tourism products in international markets and the Central American region. CATA's promotion of multi-destination tourism to overseas markets complements the strategy of CATA member countries to promote their tourism destinations.

The highest decision-making body of CATA is the Board of Directors, which consists of the ministers of tourism and the heads of tourism industry associations of the eight countries. Under the Board of Directors is the Executive Committee, which consists of the marketing managers of the government tourism offices and the secretaries-general of the tourism industry associations. CATA has a four-

<sup>3</sup> <https://www.visitcentroamerica.com/en/>

<sup>4</sup> Belize, Costa Rica, Guatemala, Honduras, Nicaragua, Panama, Dominican Republic, El Salvador

member secretariat staff and outsources some of its secretariat work to a digital marketing agency and a law firm in Madrid, Spain. The law firm also serves as CATA's headquarters in Europe.

In the early years of its existence, CATA was based in Madrid, as tourism promotion in Central America was primarily aimed at the European market. However, due to high operational costs, CATA moved its headquarters to El Salvador in 2015. CATA is funded by contributions from its member countries, but due to the economic crisis caused by COVID-19, the contributions have been reduced, leaving the Secretariat with a minimal structure for regional tourism promotion.

CATA was established with the unique perspective of promoting tourism in Spain and the European region, which share a common history and culture with Central America. However, it has also shown the difficulty of relying solely on contributions from member countries to maintain its promotional activities and organization.

### 13.1.3. Caribbean Tourism Organization

The Caribbean Tourism Organization (CTO) is a regional tourism organization established in 1989 with 26 countries and territories in the Caribbean region. Its members include governments and the private sector (corporations and individuals) that provide tourism services and products to the region.



CTO Website (<https://www.onecaribbean.org>)

The CTO aims to develop sustainable tourism for the economic and social benefit of the Caribbean people. It provides its members with services to support their tourism activities and tourism information. The Caribbean region has many small countries, and no single country can adequately develop tourism products, conduct tourism marketing and promotion, research, and train human resources. The CTO aims to work together to carry out such activities.

The member countries of the CTO pay affiliation fees based on a formula for the number of tourist arrivals to ensure fairness in the financial burden among countries. The affiliation fee covers the



operating costs of the CTO, including staff salaries. In addition, the development partners (Caribbean Development Bank, IDB's Compete Caribbean Partnership Facility<sup>5</sup>) provide support by covering the costs of projects and services.

The highest decision-making body of the CTO is the Council of Ministers of Tourism, which consists of the Ministers of Tourism and the Secretaries of Tourism Agency. The Board of Directors under the Council is responsible for determining the overall direction of the organization's activities and programs based on the policies set by the Council, and the Board consists of the Director Generals of Tourism, who represents the government members and the members from the private sector. The Executive Subcommittee of the Board is the management committee of the Board and makes decisions on all aspects of the CTO's work between the Board meetings. The Secretariat carries out the day-to-day operations of the CTO. The secretariat consists of the Office of the Executive Director, the Office of the Executive Director, the Department of Financial Resource Management, the Department of Human Resource Development, and the Department of Research and Information Technology, under the supervision of the Executive Director and two other Directors. The Secretariat has 19 full-time staff members.

Many of the member countries of the CTO are small, and each country does not have sufficient human and financial resources to develop and promote tourism. For this reason, a system in which each country cooperates and brings its resources is reasonable. It also considers the development status of the tourism sector in each country by requiring each country to bear the financial burden according to the number of tourists coming into the country. These circumstances and efforts have enabled the organization to operate sustainably for more than 30 years and contribute as a regional tourism organization.

#### **13.1.4. Organización del Mundo Maya**

The Organización del Mundo Maya<sup>6</sup> was established in 1992. It has five member countries<sup>7</sup> with Mayan civilization sites. This organization has been acting for the following four purposes. (1) to create various routes to and from major destinations in southern Mexico and other countries in the region, (2) to strengthen and improve land transportation in order to enhance tourism routes across countries, (3) to develop a maritime transportation network starting from Cancun and extending from the Caribbean coast through Quintana Roo and Belize to Guatemala and Honduras; and (4) to promote commercial agreements with transportation companies, inbound agents, and destination management companies in order to create new tourist and circular routes in the region.

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<sup>5</sup> Private sector development programs by IDB, UK government, CDB, and Canadian government

<sup>6</sup> <https://gomundomaya.com>

<sup>7</sup> Belize, El Salvador, Guatemala, Honduras, and Mexico.



Organización del Mundo Maya website

Introduction of historical and cultural resources through photographs

The organization includes the Regional Commission, Board of Directors, Executive Direction, Advisory Committee, and Permanent Technical Secretariats. Each member country and its partners (private companies, prospective member countries, and international organizations) receive funds, which the national tourism management agency manages (e.g., Ministry of Tourism), where the Executive Direction (which rotates every two years) is located. The host country of the Executive Direction is responsible for covering its operational costs and the salaries and per diem of its staff.

The Organización del Mundo Maya creates cross-border tourism routes between Mayan civilization sites and tourist destinations in Central America. It focuses on tourism development and resource management rather than tourism promotion. It is a unique organization in that the member countries take turns in managing the funds. The five Central Asian countries also have a common tourism resource, the Silk Road sites, and the organization and activities of Organización del Mundo Maya can be used as a reference when considering the utilization and conservation of Silk Road sites.

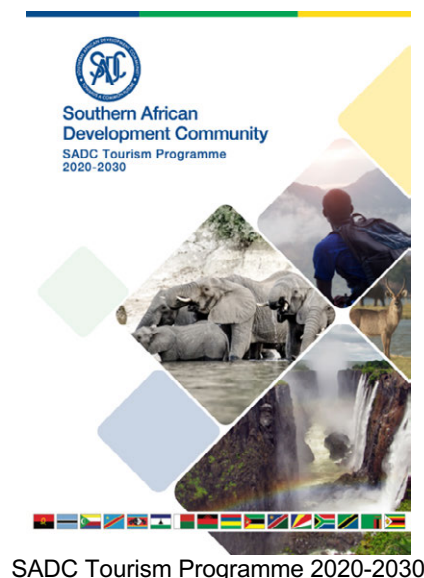
### 13.1.5. Southern Africa: SADC and RETOSA

The Regional Tourism Organization for Southern Africa (RETOSA) was established in 2009 as a regional tourism organization responsible for the tourism sector of the Southern African Development Community (SADC), a framework for regional cooperation in Southern Africa. Its headquarters is located in Johannesburg, South Africa, and 15 countries<sup>8</sup> are members.

RETOSA's objectives were to (1) promote tourism in the Southern African region as "one destination, and many aspects"; (2) attract tourists from within and outside the region; (3) promote sustainable tourism as a driver of economic vitality for local communities; (4) collect and provide tourism-related statistics for the region; and (5) improve the quality of tourism-related services in the region. However, due to the inability to receive sufficient contributions from member countries, financial problems arose in 2016, and liquidation proceedings are underway<sup>9</sup>.

After the liquidation of RETOSA, SADC plans to establish a Tourism Coordinating Unit (TCU) within the Food, Agriculture and Natural Resources (FANR) Directorate to promote tourism development at the regional level in Southern Africa. The SADC Tourism Programme 2020-2030, compiled in 2019, includes only the liquidation process of RETOSA as a project-based activity. The future regional cooperation in the tourism sector in Southern Africa will be limited to the analysis of the tourism sector in each country and the development of a common tourism policy for each country.

RETOSA, like CATA, had been focusing on attracting tourists from outside the region, but its activities came to a standstill when it failed to receive contributions from member countries.

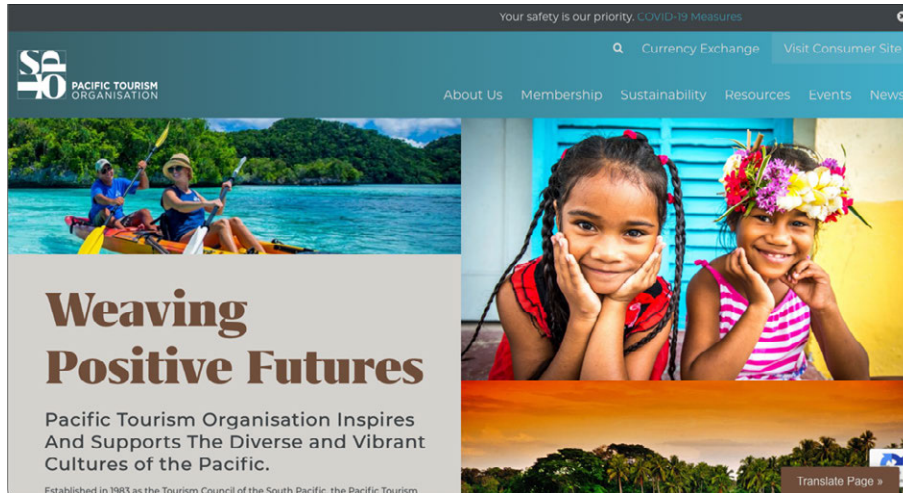


<sup>8</sup> The 15 countries are Angola, Botswana, Congo, Tanzania, Zambia, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Seychelles, South Africa, Swaziland, and Zimbabwe, and the SADC members are 16 countries consisting of these countries and Comoros.

<sup>9</sup> [https://www.sadc.int/files/9715/8818/8701/SADC\\_Tousim\\_Programme\\_English.pdf](https://www.sadc.int/files/9715/8818/8701/SADC_Tousim_Programme_English.pdf)

### 13.1.6. Pacific Tourism Organization

The Pacific Tourism Organization (SPTO)<sup>10</sup> has headquarters in Suva, Fiji. Twenty-one governments<sup>11</sup> and 200 private organizations and individuals are members as of November 2020.



SPTO Web site (<https://southpacificislands.travel>)

The main activities of the SPTO are (1) to compile information, especially statistics, on the tourism sector in each country, (2) to serve as a conduit for information exchange among members, (3) to serve as a conduit for assistance from development partners to Pacific Islands countries, and (4) to promote tourism marketing and promotion in the Pacific region, especially those of cruise tourism.

The SPTO is organized into three levels: the Council of Ministers of Tourism, the Board of Directors, and the Management. The Council of Ministers of Tourism is composed of ministers or authorized representatives from SPTO member countries and meets annually. The primary responsibility of the Council is to monitor the SPTO's policies and plans and budget execution and to provide necessary recommendations and guidance. It is also tasked with securing donor funding for SPTO's activities. The board comprises one representative from each member government and three representatives from the private sector and meets at least twice a year. The primary responsibilities of the Board are to (1) approve the annual budget, (2) approve operational policies and strategies, (3) oversee the work program, (4) review and monitor operational rules, procedures, and regulations related to finance and operations, and (5) advise management on matters of need.

The Chief Executive Officer (CEO), appointed by the Board of Directors, carries out the day-to-day management of SPTO and is supported by professional staff, administrative staff, and technical advisors. The SPTO management organization consists of four departments: Marketing, Research & Planning,

<sup>10</sup> The Pacific Tourism Organization was known as the South Pacific Tourism Organization until 2019. As such, the abbreviation is still SPTO.

<sup>11</sup> American Samoa, Cook Islands, FSM, Fiji, French Polynesia, Kiribati, Nauru, Marshall Islands, New Caledonia, PNG, Samoa, Solomon Islands, East Timor, Tokelau, Tonga, Tuvalu, Vanuatu, Wallis and Futuna, Rapa Nui (Easter Island), People's Republic of China

Sustainable Tourism Development, and Finance & Corporate Services, and in July 2020, the management organization had 15 staff members.

The SPTO was established in 1994 with the support of the EU. Its activities were funded by project funds from the EU and contributions from member countries and private members. However, in 2004, the termination of the EU project resulted in a shortage of funds for its activities, and the SPTO decided to invite China as a new member to receive financial support.

The SPTO is a regional tourism organization covering Micronesia, Polynesia, and Melanesia in the Pacific Ocean, but it seems to be a little too broad to have a sense of unity as a region. The Polynesian Island states have a strong bilateral relationship with New Zealand, and that Palau, a major tourist destination in Micronesia, is not an official member of the SPTO may also weaken its presence as a regional tourism organization. The presence of the private sector also does not appear to be as large as the CTOs discussed in section 13.1.3.

### **13.1.7. Lessons for the five Central Asian countries in terms of cooperation**

From analyzing the organizational structure, activities, and budgets of the six regional tourism organizations, the following are the lessons that can be learned in terms of cooperation in tourism development in the Central Asian region.

#### Importance of regional cohesion

For tourism development cooperation at the regional level to be sustainable, the region needs to be cohesive. In the case of the five Central Asian countries, based on the historical and cultural background and the people's awareness, as shown in section 1.1 of Part 2, the region seems to have more cohesion than in many of the cases mentioned in this chapter. In section 13.1.4, the study team discussed cooperation using the ruins of the Mayan civilization. In contrast, in the case of the five Central Asian countries, the Silk Road ruins are considered equivalent.

#### Problems with a system that relies on contributions from member countries

Several examples of regional tourism organizations are mainly financed by contributions from member countries but whose activities gradually narrowed down because the member countries did not pay their contributions as planned, which made the member countries reluctant to pay their contributions. There are also cases where a large amount of budget was used for the administration of a regional tourism organization, but when the financial resources became scarce, the functions of the Secretariat were reduced, and the planned projects could not be carried out. Such examples can be observed not only in regional tourism organizations but also in the operation of DMOs around the world, and it is helpful to follow up on the research and discussions on the management of DMOs. Concerning DMOs, there is

also an argument that DMOs themselves need to have the ability to generate some income.

### Engaging the private sector

Related to the discussion above, the regional tourism organizations, which are composed solely of organizations in charge of tourism in each government, tend to be bureaucratic in their organizational structure and their approach to financial resources for operation. The private sector should be invited to the regional tourism organizations as members and as a board of directors or as a secretariat. So the organizations can diversify their activities and provide services that meet the needs of the private sector by utilizing the ideas of the private sector, collecting membership fees from the private sector members, and securing new financial resources.

### Effectiveness of organizations such as task forces

Instead of creating a regional tourism organization from the beginning, it would be effective to develop a task force-like organization depending on the project or create a system in which the public and private sectors of the member countries become members, such as the Triple-P Tourism project. In the five Central Asian countries, except for Uzbekistan and Kazakhstan, the human and financial resources of government tourism organizations seem to be quite limited. It is necessary to watch how the Triple-P Tourism project in the six Western Balkan countries progresses in the future.

## **13.2. Analysis of DMOs across local governments in Japan**

### **13.2.1. Analysis of regional DMOs**

In this section, the study team will compile information on the "inter-prefectural DMOs," which conducts marketing and management of an inter-prefectural area as a single tourism destination in Japan, focusing on the following three points: (1) organizational structure, (2) activities, and (3) budget. In Japan, in addition to inter-prefecture DMOs, regional DMOs and local DMOs<sup>12</sup> are defined in the "Guidelines for the registration system of tourism and regional development organization."

As of November 2021, the number of inter-prefectural DMOs registered as "Registered tourism and regional development organization (Registered DMOs)" by the Japan Tourism Agency is 10 organizations as tabulated in Table 13.1.

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<sup>12</sup> A regional DMO is an organization that creates a tourism area by marketing and managing an area that spans multiple city and/or town governments as a unified tourism area. A local DMO is, in principle, an organization that develops a tourism area by marketing and managing the area of a single city or town as a tourism area.

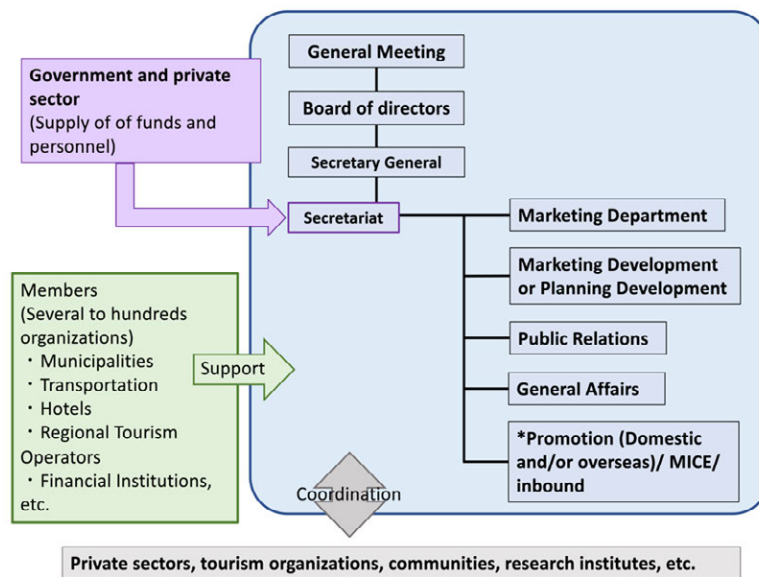
**Table 13.1: List of inter-prefectural DMOs**

Name of DMO	Target area for marketing and management (prefecture governments)
Hokkaido Tourism Promotion Organization <sup>13</sup>	Hokkaido
Tohoku Tourism Promotion Organization	Aomori Prefecture, Iwate Prefecture, Akita Prefecture, Miyagi Prefecture, Yamagata Prefecture, Fukushima Prefecture, Niigata Prefecture
Council of cooperation and promotion of tourism in Kanto	Fukushima, Ibaraki, Tochigi, Gunma, Saitama, Chiba, Tokyo, Kanagawa, Niigata, Yamanashi, Nagano
Central Japan Tourism Organization	Toyama, Ishikawa, Fukui, Nagano, Gifu, Shizuoka, Aichi, Mie, Shiga
Kansai Tourism Organization	Fukui, Mie, Shiga, Kyoto, Osaka, Hyogo, Nara, Wakayama, Tottori, Tokushima
Setouchi Tourism Promotion Organization	Hyogo, Okayama, Hiroshima, Yamaguchi, Tokushima, Kagawa, and Ehime Prefectures
San'in Tourism Organization	Tottori, Shimane
Shikoku Tourism Creation Organization	Tokushima, Kagawa, Ehime, Kochi
Kyushu Tourism Promotion Organization	Fukuoka, Saga, Nagasaki, Kumamoto, Oita, Miyazaki, Kagoshima
Okinawa Tourism & Convention Bureau	Okinawa

Source: Compiled by the study team from the website of the Japan Tourism Agency

### Organizational structure

DMO organizations take the form of general incorporated associations, generally incorporated foundations, or public incorporated associations. Many of them have a few dozen staff members, and local governments and private organizations (chamber of commerce and tourism associations, transportation organizations, travel agencies, accommodation providers, and regional businesses) collaborate to hire staff or second them from their respective organizations.



Note: The departments indicated by \* are those established by each organization's policy.  
 Source: Study team

**Figure 13.2 General organizational structure of an inter-prefectural DMO**

Most inter-prefectural DMOs offer some kind of return program to their corporate and individual

<sup>13</sup> According to the documents on the Japan Tourism Agency's website, Hokkaido Tourism Promotion Organization and Okinawa Tourism & Convention Bureau are not DMOs at the inter-prefectural level. However, the Hokkaido DMO has been registered as an inter-prefectural DMO because it is difficult to promote tourism in Hokkaido due to its large area, and in Okinawa Prefecture due to its location on islands. [https://www.mlit.go.jp/kankochu/page04\\_000078.html](https://www.mlit.go.jp/kankochu/page04_000078.html)

members, such as providing information, advertising, business matching, and granting business bidding qualifications.

Each DMO has a general meeting, a board of directors, and a secretariat that serves as the main management body. The Secretariat consists of a marketing department, a market development, a planning department, a public relations department, and a general affairs department, etc. According to the organization's tourism attraction policy, some DMOs have also established departments such as an overseas inbound promotion department and a MICE promotion department (refer to Figure 13.2).

The number of members differs according to each organization. Hokkaido Tourism Promotion Organization and Okinawa Convention Bureau have the most significant number of members, with Hokkaido having 587 members and Okinawa having 626 members. Both Hokkaido and Okinawa prefectures are major tourist destinations in Japan, and the importance of tourism to the local economy can be seen from a large number of members.

### Activities

Typical activities of inter-prefecture DMOs can be summarized into the following seven items. Table 13.2 indicates activities of the inter-prefectural DMO.

- Implementation of tourism strategies: implement tourism strategies set by prefectural governments and recommend activities to implement tourism strategies.
- Coordination: smoothly collaborate and coordinate with the national government, local governments, private companies, and related industries and organizations.
- Marketing: conduct surveys for domestic and international tourist movement, FAM tours which invite foreign journalists/writers and influencers to attract inbound visitors, and brand building.
- Promotion: public relation works through various media. Participation and invitations to domestic and international travel expos and product exhibitions.
- Regional support: provide supports for tourism infrastructure development, multilingual service, preparation of maps, and guide education.
- Surveys and research: conduct tourism statistical surveys in collaboration with universities and research institutions.
- Product development: develop tours and souvenirs.

**Table 13.2: List of activities of DMO for wide-area cooperation**

Name of DMO	Promotion of strategy	Coordination	Marketing	Promotion	Community support	research and study	Product development
Hokkaido Tourism Promotion Organization	A	A	A	A	A		support
Tohoku Tourism Promotion Organization	A	A		A			
Council of cooperation and promotion of tourism in Kanto	A	A		A	A	A	



Name of DMO	Promotion of strategy	Coordination	Marketing	Promotion	Community support	research and study	Product development
Central Japan Tourism Organization		A	A	A	A		
Kansai Tourism Organization		A	A	A	A		
Setouchi Tourism Promotion Organization		A	A	A	A		A
San'in Tourism Organization		A	A	A	A		A
Shikoku Tourism Creation Organization		A	A	A	A		
Kyushu Tourism Promotion Organization	A	A	A	A	A	A	A
Okinawa Tourism & Convention Bureau		A		A	A		

Note: A means applicable.

Source: Prepared by the research team based on materials published on each organization's website.

## Budget

Among the inter-prefectural DMOs, the study team reviewed the seven organizations' income and expenditure budget status. The income of the seven organizations consisted of subsidies, membership fees, contributions, business income, donations and sponsorships, miscellaneous income, and non-operational income. Although the proportions of expenses vary from one organization to another, the revenues noted in the 2020 statement or the 2021 budget can be summarized in Table 13.3.

**Table 13.3: List of revenue items of DMO**

Name of DMO	Subsidy from the national government	Subsidy from the prefectural government	Contributions	Membership fee	Business income	Donations and sponsorship	Miscellaneous income	Non-operating income	Percentage of subsidies
Hokkaido Tourism Promotion Organization	B	A	B	B	B				96%
Central Japan Tourism Organization			B	A	B		B		Unknown
Kansai Tourism Organization	A		B	B	B	B	B		37%
Setouchi Tourism Promotion Organization	B	A	B				B		31%
San'in Tourism Organization	B	A	B				B		62%
Kyushu Tourism Promotion Organization		A	B	B			B		67%
Okinawa Tourism & Convention Bureau		B		B	A	B		B	2.8%

Note: A refers to the first income, B refers to the second and subsequent income.

Source: Prepared by the study team from each DMO's FY2020 financial statements or FY2021 budget.

Except for the Central Japan Tourism Organization, six DMOs have received subsidies from the national

or prefectural governments. Subsidies accounted for more than 60% of the total for three organizations. 90% of the subsidies were provided by the Hokkaido Tourism Promotion Organization, partly because the organization's purpose is to promote public service. The DMOs whose subsidies are unknown or less than 10% are Central Japan Tourism Organization and Okinawa Convention Bureau. Membership fees were the largest source of income for the Central Japan Tourism Organization, while business income was the largest source of income for the Okinawa Tourism & Convention Bureau. The Okinawa Tourism & Convention Bureau's business income was mainly from the operation and facility management of the Underwater Observatory Tower at the Busena Marine Park and the former Japan Navy Underground Headquarters.

### 13.2.2. Examples of DMOs with distinctive Initiatives

The following summarizes three of Japan's DMOs that have shown distinctive approaches to their activities. The location of each organization is shown in Figure 13.3.



Source: Study Team

**Figure 13.3: Location of the three DMOs**

#### San'in Tourism Organization


The San'in Tourism Organization<sup>14</sup> has developed "Visit San'in Tourist Pass" and "Discover Another Japan Pass," smartphone applications with coupons and payment functions. Those can be used at transportation (secondary transportation such as local trains and local buses), tourist facilities, local restaurants, and souvenir stores, to attract foreign individual tourists.

The Visit San'in Tourist Pass is for Shimane and Tottori prefectures. At the same time, the Discover Another Japan Pass is a service for a broader range of prefectures, including Okayama, Hiroshima, Shimane, Tottori, and Yamaguchi. Discover Another Japan Pass aims to encourage foreign individual

<sup>14</sup> <https://www.sanin-tourism.com/en/>

tourists who visit Hiroshima and the Kansai area to visit the Chugoku Region, positioned as "Another Japan."

**Table 13.4: Visit San'in Tourist Pass and Discover Another Japan Pass**

logo		
Service Name	Visit San'in Tourist Pass	Discover Another Japan Pass
Target Area	Shimane and Tottori Prefectures	Okayama Prefecture, Hiroshima Prefecture, Shimane Prefecture, Tottori Prefecture, Yamaguchi Prefecture
Concept	<ul style="list-style-type: none"> <li>- San'in Tourism MaaS</li> <li>- Connecting major tourist facilities in the San'in region and commercializing them</li> <li>- Collecting data on individual travelers</li> </ul>	<ul style="list-style-type: none"> <li>- Chugoku Region Tourism MaaS</li> <li>- Connecting and commercializing high value-added content</li> <li>- Collecting data on individual travelers</li> </ul>
target demographic	<ul style="list-style-type: none"> <li>- Foreigners using Sanin Airport and surrounding airports</li> <li>- Foreigners staying in Kansai and Hiroshima area</li> </ul>	<ul style="list-style-type: none"> <li>- Chinese foreigners using Kansai, Hiroshima, and Okayama airports</li> <li>- English-speaking foreigners staying in the Kansai and Hiroshima areas</li> </ul>

Source: Apple Store, Google Play, San-in Tourism Organization website

Various DMOs are working on services that can collect data on tourists while making it more convenient to use tourist facilities and secondary transportation. For example, the Tottori Chubu Tourism Promotion Organization has developed "Tottori Chubu Navitto," covering central Tottori Prefecture and northern Okayama Prefecture. At the prefectural level, Kumamoto Prefecture (Visit Kumamoto Tourist Pass), Nagasaki Prefecture (Visit Nagasaki Tourist Pass), Nagano Prefecture (NAGANO PASS), and in the private sector, Setouchi (Setouchi Tourism Navi setowa), and Okinawa (Re: sort@OKINAWA), etc.

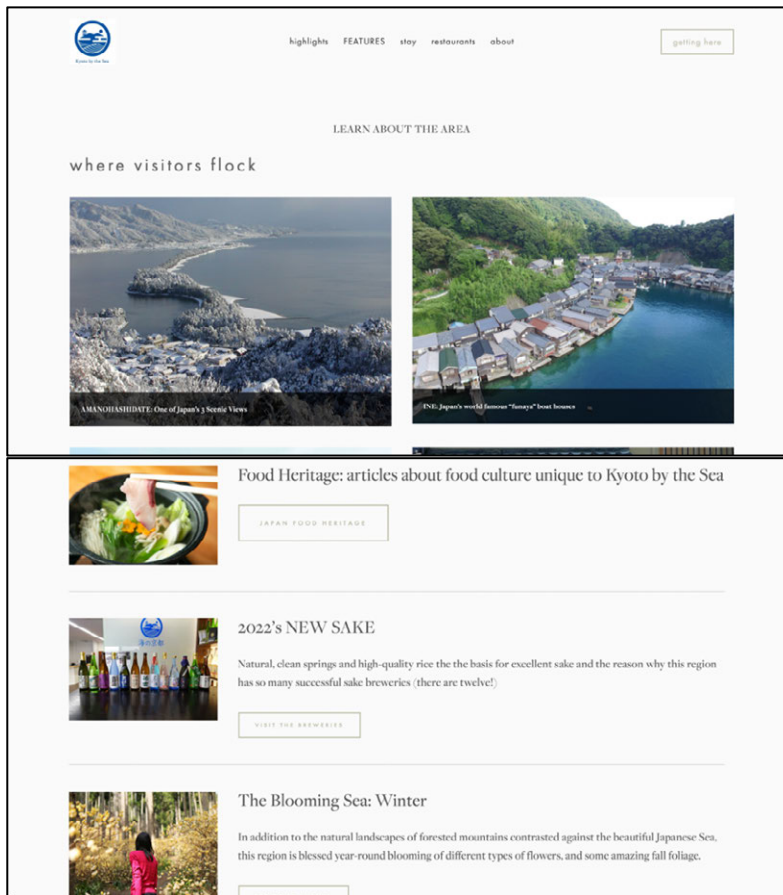
#### Kyoto by the Sea DMO<sup>15</sup>

Kyoto by the Sea DMO is a regional DMO formed by seven cities and towns in the northern Kyoto Prefecture: Fukuchiyama City, Maizuru City, Ayabe City, Miyazu City, Kyotango City, Ine Town, and Yosano Town. Many people in Kyoto think of the "Historic Monuments of Ancient Kyoto (Kyoto, Uji, and Otsu Cities)," which is registered as a World Heritage site, but cultural assets of the ancient capital of Kyoto are in the southern part of Kyoto Prefecture, including Kyoto City and Uji City. The Kyoto Prefectural Government has been implementing the "Kyoto by the Sea" project as "Another Kyoto" concept. Kyoto Prefecture government believes that the opening of the Kyoto Jyukan Expressway in 2015 and the completion of the multipurpose international terminal (Mizunagi Pier) at the Port of Maizuru in 2010 will improve access to the northern region of the prefecture.

The Kyoto by the Sea DMO has 17 projects. In addition to the implementation of tourism strategies, marketing, promotion, regional support, and product development, it also shares and disseminates

<sup>15</sup> <https://www.kyotobythesea.com>

regional information that leads to migration and settlement and builds a system to attract and receive mid- to long-term residents.



Kyoto by the Sea website  
(<https://www.kyotobythesea.com/>)

Feature of the activities and foods in northern Kyoto in winter

In terms of product development, the DMO aims to develop and promote stay-and-experience travel products, which are differentiated from those in the southern part of Kyoto Prefecture.

### Tanabe City Kumano Tourism Bureau

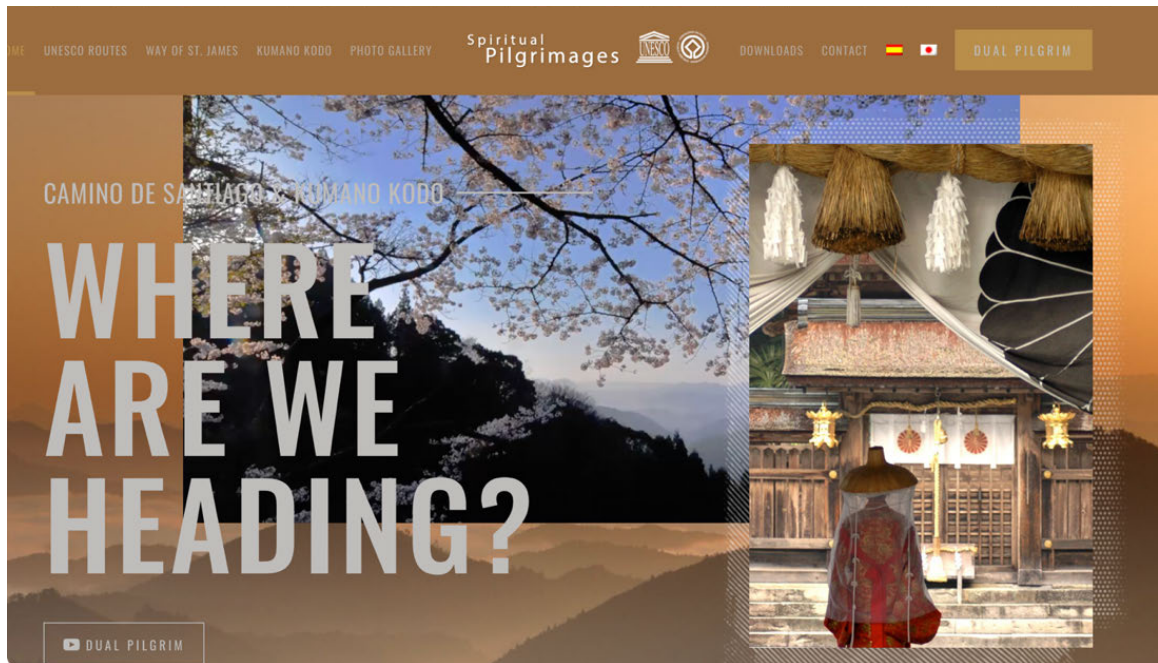
The Tanabe City Kumano Tourism Bureau<sup>16</sup> is a joint public-private tourism promotion organization established in April 2006 with the merger of Tanabe City in 2005, consisting of the former tourism associations in Tanabe City (Tanabe, Ryujin, Oto, Nakaheji, and Kumano Hongu). It has received various awards since around 2010, including the Chief Secretary of Japan Tourism Agency Award in 2018, the Chief Secretary of Japan Tourism Agency award & DMO Promotion Special Award in 2019, and the Prime Minister's Award in 2020 at the Furusato Development Awards 2020.

With the theme of the Kumano Kodo, which is registered as a World Heritage Site, the organization is working to disseminate information and receive tourists both domestically and internationally. The Tourism Bureau's website provides information on the Kumano Kodo, hands-on activities,

<sup>16</sup> <https://www.tb-kumano.jp/en/>

accommodations, transportation, meals, and the ability to make reservations for these services<sup>17</sup>.

A DMO's unique initiative is making a partnership with Santiago de Compostela City in Spain, agreeing on the joint promotion of their pilgrimage sites in 2010. Pilgrims who have completed both the Kumano Kodo and Santiago de Compostela pilgrimage (double pilgrimage) are registered as "pilgrims of the two paths" and introduced on the website<sup>18</sup>.



Double Pilgrimage website (<https://www.spiritual-pilgrimages.com/en/>)

The Kumano Kodo pilgrimage and Santiago de Compostela pilgrimage made a cooperation agreement signed in 1998 between Wakayama Prefecture and the Autonomous Community of Galicia, in which Santiago de Compostela is included. Tanabe City also signed a tourism exchange agreement with Santiago de Compostela City in 2015. Furthermore, Mie Prefecture, which together with Wakayama Prefecture constitutes part of the Kumano Kodo, signed a "Memorandum of Understanding on Cooperation and Collaboration Making Use of the World Heritage Pilgrimage Routes" with the Basque Country in Spain in November 2019. Bask Country also constitutes part of the Santiago de Compostela pilgrimage route.

Tanabe City Kumano Tourism Bureau is a small DMO, but its activities are spreading worldwide, and it has become a level that influences the surrounding local governments.

<sup>17</sup> Users can go to the website of Kumano Travel (<https://www.kumano-travel.com/ja>), a community-based travel agency established by the Tanabe City Kumano Tourism Bureau, to make reservations.

<sup>18</sup> <https://dual-pilgrim.spiritual-pilgrimages.com/>

### 13.2.3. Potential for adaptation to regional cooperation in Central Asia

Based on the analysis of the organizational structure, activities, and budgets of DMOs in Japan in sections 13.2.1 and 13.2.2, the following points are identified as lessons for tourism development and promotion at the regional level in Central Asia.

#### Organization of public-private partnerships

DMO organizations in Japan are generally jointly managed by government and private sectors. In Uzbekistan, the challenge is for government tourism organizations to conduct tourism administration and development while listening to the opinions of the private sector in the future tourism development, and in the Kyrgyz Republic, the challenge is to overcome the limited human resources of the central and regional governments. The organizational structure of Japan's DMO and its operation can be a reference for future cooperation between the public and private sectors in tourism development and promotion organizations in Central Asia.

#### Activities

In Japan, DMOs at the level of inter-prefectural, regional, and local are all involved in efforts to support tourism marketing and promotion and tourism resource development and management. It is, of course, necessary for the five Central Asian countries to conduct tourism marketing and promotion at the national level, but it is also necessary to conduct marketing and promotion at the regional level in "Central Asia" in conjunction with the development of tourism resources that are common at the regional level, or for supplement tourism products that are lacking at the national level. It is thought to effectively conduct Japan's inter-prefectural and regional DMOs have also created their slogans and logos<sup>19</sup>. These activities can be referred to when the five Central Asian countries conduct tourism marketing and promotion at the regional level.



Source: The Official Kyushu Travel Guide <https://www.visit-kyushu.com/en/about-us/>

**Figure 13.4: Slogan and logo of the Kyushu Tourism Promotion Organization**

<sup>19</sup> For example, the Kyushu Tourism Promotion Organization says, "Relax & Rejoice ONSEN ISLAND KYUSHU" as its catchphrase and has designed its own logo. <https://www.visit-kyushu.com/en/about-us/>

In the San'in Tourism Organization's digital round trip pass, the study team discussed the benefits for tourists of providing transportation and regional information and improving convenience and the benefits for businesses of collecting information on tourists' activities. Such efforts to digitize tourism are expensive to develop and maintain services, including application development, but it is easy to start introducing tourist activities and surrounding information on websites in an easy-to-understand manner. Information dissemination on websites and social networking sites should also create a state of communication with visitors, including potential tourists.

The example of the Tanabe City Kumano Tourism Bureau explained the combination of information dissemination and reservation of tourism products based on the local perspective and information dissemination from the theme of pilgrimage and cooperation with Spain. In the five Central Asian countries as well, there is a possibility of developing products based on local perspectives, such as Silk Road heritage, Islamic cultural heritage, Buddhist monument sites, and nomadic culture and directly linking information dissemination and business.

### Budget

DMOs in Japan rely heavily on subsidies from the national or prefectural governments. On the other hand, it was also confirmed that examples of DMOs derive most of their income from membership fees and business revenue. In order to explore the possibility of establishing regional tourism organizations in Central Asia in the future, it is necessary to look for cases where the DMO itself earns a certain amount of business revenue, not only in Japan but also in other countries.





## **PART 2: Directions for Tourism Development in Central Asia**



## 1. Potential and challenges of tourism development

### 1.1. Justification of tourism development targeting the "Central Asian countries"

The five countries of Uzbekistan, Kyrgyz Republic, Kazakhstan, Turkmenistan, and Tajikistan are inhabited by Turkic and Persian descent, who have established empires and dynasties that have shaped the history of the region.

The region was conquered and annexed by the Russian Empire between the 1850s and 1890s. After the Russian Revolution, the Turkistan Autonomous Soviet Socialist Republic was established as part of the Russian Soviet Federative Socialist Republic in 1918. In 1924, the demarcation of the ethnic republican borderlands of the Union of Soviet Socialist Republics led to the establishment of the states that are now linked to the five countries: Uzbek Soviet Socialist Republic, Kara-Kyrgyz Autonomous Oblast (later upgraded to Kyrgyz Soviet Socialist Republic), Kazakh Autonomous Soviet Socialist Republic, Tajik Autonomous Soviet Socialist Republic (part of Uzbek Soviet Socialist Republic, later upgraded to Tajik Soviet Socialist Republic) and Turkmen Soviet Socialist Republic<sup>1</sup>. In other words, until the 1920s, there were no clear borders, and no nation-state consciousness had been fostered. This is why there is so much traffic between the people of these countries across the border.

The history of the five countries that formed part of the Soviet Union lasted about 70 years. During this period, the five countries were recognized as a single unit, and the grouping of the countries progressed, as well as the ties with the current Russian Federation, were strengthened. On the other hand, the borders of the republics were not so strong, and the traffic of people and goods was very active.

With the declaration of each country's sovereignty in 1990 and the declaration of independence of the Republic in 1991, nationalism in each country rose, making it difficult for people and goods to come and go across the border, and ethnic conflicts broke out. However, since 2016, the traffic of people and goods has begun to increase again, and there have been moves to promote it.

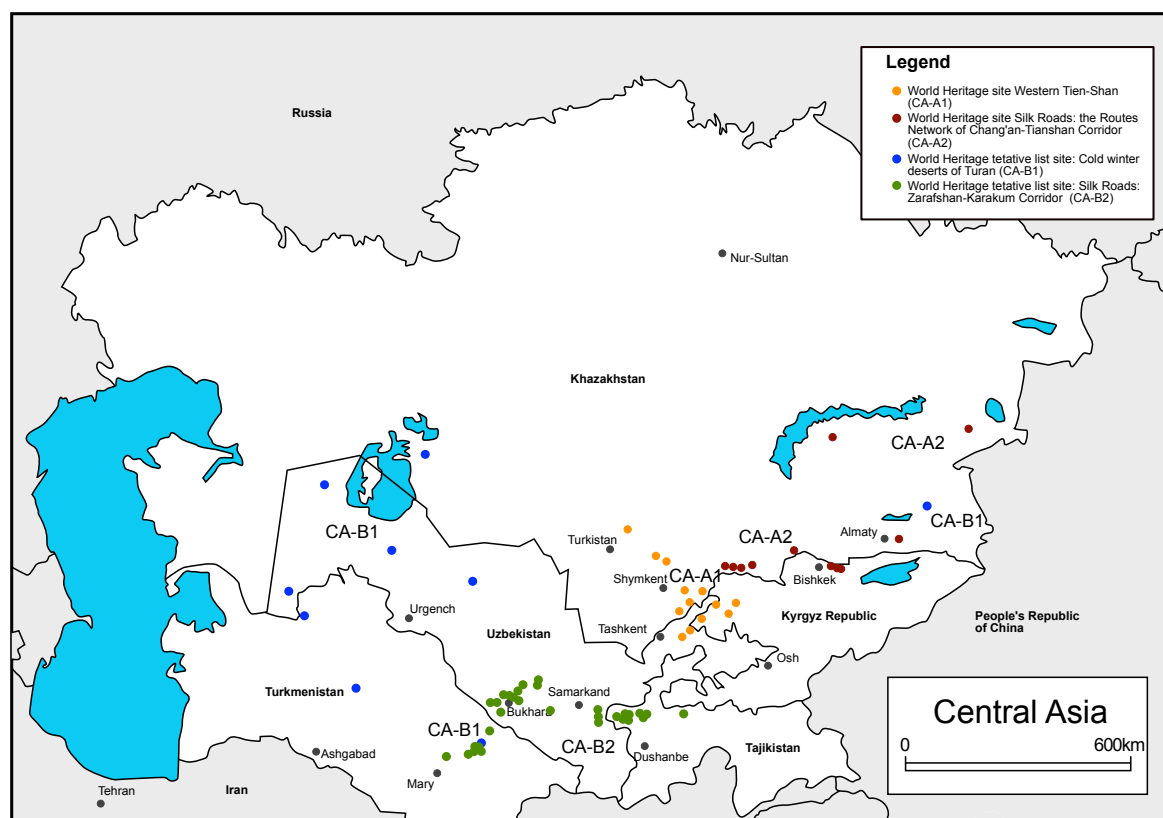
The five Central Asian countries with such a history can promote integrated tourism development as one region. The following factors can be cited as reasons for promoting integrated tourism development.

The five countries have rich cross-country tourism resources. For example, as described in Section 4.1 of Part 1, the "Western Tian-Shan" and the "Silk Roads: the Trade Route Network of Chang'an-Tianshan Corridor" are World Heritage sites in multiple countries, and there are two groups on the World Heritage Tentative List and six intangible cultural heritages<sup>2</sup>. As shown in Figure 1.1, Table 1.1, Table 1.2 and Table 1.3.

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<sup>1</sup> Written by the study team based on information on general information of the five countries in the Ministry of Foreign Affairs of Japan websites.

<sup>2</sup> Table 4.1, Table 4.2, and Table 4.3 in Part 1



Source: Prepared by the study team from the World Heritage Center website (<http://whc.unesco.org>)

**Figure 1.1: World Heritage sites and World Heritage Tentative List sites over the Central Asian countries**

**Table 1.1: World Heritage sites in the Central Asia countries**

Country	Name	Classification	Year of registration
Kazakhstan, Kyrgyzstan, Uzbekistan	CA-A1 Western Tian-Shan	Natural heritage	2016
Kazakhstan, Kyrgyzstan	CA-A2 Silk Roads: the Trade Route Network of Chang'an-Tianshan Corridor	Cultural heritage	2014

Source: Prepared by the survey team from the World Heritage Centre website (<http://whc.unesco.org>)

**Table 1.2: Tentative List of World Heritage in the Central Asia countries**

Country	Name	Classification	Year of registration
Kazakhstan, Uzbekistan, Turkmenistan	CA-B1 Cold winter deserts of Turan	Natural heritage	2020 -2021
Uzbekistan, Tajikistan, Turkmenistan	CA-B2 Silk Roads: Zarafshan - Karakum Corridor	Cultural heritage	2021

Source: Prepared by the survey team from the [World Heritage Tentative List](https://whc.unesco.org/en/tentativelists/) (<https://whc.unesco.org/en/tentativelists/>)

**Table 1.3: List of Intangible Cultural Heritage across the Central Asian countries**

Country	Name	Year of registration
Kazakhstan, Kyrgyzstan, Uzbekistan, Tajikistan, Turkmenistan, etc.	CA-C1 auryz, Nooruz, Nowruz, Nevruz, Nowruz (March 21: New Year)	2016
Kazakhstan, Kyrgyzstan, and others	CA-C2 Flatbread Process and the Culture of Sharing: Ravash, Katirma, Jyvka, and Jyvka	2016
Kazakhstan, Kyrgyzstan, and others	CA-C3 Traditional intellectual strategy games: Togiz Kumarak, Toguz Korgur, Mangala/Gyotürme)	2020
Kazakhstan, Kyrgyzstan	CA-C4 Traditional knowledge and skills in making Kyrgyz and Kazakh yurts (Turkic nomadic dwellings)	2014

Country	Name	Year of registration
	CA-C5 Aitish/Itis, The Art of Improvisation	2015
Uzbekistan, Tajikistan	CA-C6 Shashmaqam music	2008

Source: Prepared by the survey team from the website of the Center for Intangible Cultural Heritage (<https://ich.unesco.org/en/lists>)

The Fergana Basin and its surrounding mountainous areas have a complicated borderline between Uzbekistan, the Kyrgyz Republic, and Tajikistan, with multiple enclaves in each country. This is because the permanent inhabitants of the basin (Uzbeks, Salts, and Kipchaks) and the semi-nomadic inhabitants of the mountainous areas (Kyrgyz and Tajiks) used to live and work together. Because of the artificially drawn borderlines, there is still a lot of movement of people across the border. In addition, the region is home to people of various cultures, making it a region with high potential for tourism development. The formation of tourism routes in this area will inevitably involve crossing borders.

On the other hand, these five countries are also complementary in terms of tourism resources. Uzbekistan, Turkmenistan, and western Tajikistan were inhabited by many sedentary people, while Many nomadic people inhabited kyrgyz Republic, Kazakhstan, and eastern Tajikistan. The former is a suitable place for many people to gather and live together to form cities, and as a result, it is rich in historical and cultural resources. The latter is a place with a harsh natural environment but is blessed with beautiful nature such as deserts, mountains, and lakes. As a result, it is possible to find complementarities such as combining Uzbekistan's historical and cultural resources with the natural resources of the Kyrgyz Republic and Kazakhstan or combining the sedentary and urban culture of Uzbekistan with the nomadic culture of the Kyrgyz Republic and Kazakhstan.

For the Central Asian region with such a background, Japan has not only bilateral relations with each country but also a framework for relations and cooperation with the five countries as a whole. The Japanese government and the governments of the five countries launched the "Central Asia + Japan" dialogue in August 2004 and have been promoting diplomacy to support the "open, stable, and independent" development of Central Asia and contribute to regional and international peace and stability as a "catalyst" for the development of regional cooperation. In this context, the tourism sector was taken up as one of the practical areas of cooperation. An expert meeting on tourism was held in Tokyo in February 2018 and January 2020<sup>3</sup>. In addition, as noted in Chapter 10 of Part 1, USAID, GIZ, and the EU have been providing support to the tourism sector, both to individual countries and to the five countries as a region.

During the interviews in Uzbekistan and Kyrgyzstan conducted in June and July 2021, the public and private sectors in the two countries agreed that the five countries must cooperate in tourism promotion and the formation of multi-country tourism routes. Uzbekistan's MOTAS, taking pride in its position as

<sup>3</sup> [https://www.mofa.go.jp/mofaj/press/release/press4\\_005688.html](https://www.mofa.go.jp/mofaj/press/release/press4_005688.html); [https://www.mofa.go.jp/mofaj/press/release/press4\\_008286.html](https://www.mofa.go.jp/mofaj/press/release/press4_008286.html)

a leader in the tourism sector of the five countries, has prepared a budget for the construction of a website for the promotion of tourism in the five countries and has begun activities. The Kyrgyz Republic also believed that complementary tourism development with Uzbekistan, which receives a large number of tourists, would effectively promote the development of the tourism sector. Tour companies in both countries also believe that they could diversify their tourism products by forming tourism routes between their respective countries and neighboring countries. In Uzbekistan, public and private sectors voiced their awareness of the three Caucasus countries, mainly Georgia, as rivals for tourism in the five Central Asian countries or as targets for tourism development. In addition to the commonality of the three Caucasus countries being originally located along the Silk Road, it seems that the three countries, like the five Central Asian countries, came to be regarded as a group during the Soviet era.

Given the above background, the study team can say that promoting tourism development in the five Central Asian countries as one group has sufficient grounds and justification.

## **1.2. Potential and challenges of tourism development in Uzbekistan**

The strength of Uzbekistan's tourism sector is its rich historical and cultural heritage. Uzbekistan has four world cultural heritage sites, Samarkand, Bukhara, Khiva, and Shahrisabz, and the Golden Route connecting them attracts many tourists. In addition to conventional historical and cultural heritage tourism, the country has rich resources that can utilize for tourism, and there is ample room for the diversification of tourism products. For example, some activities can be enjoyed in nature, such as skiing and mountain climbing, experiential tourism in rural areas, such as agrotourism, and pilgrimage tourism, which has room to develop new markets in Asia. Food culture is also an attractive tourism resource, as evidenced by the fact that the country was awarded first place in the gastronomic tourism category in the 2018 National Geographic Traveler Awards<sup>4</sup>. Other than the abundance of tourism resources, the tourism policy reforms under President Mirziyoyev's open economic policies, such as exemption of tourist visas and promotion of investment, are also positively impacting the tourism sector.

On the other hand, the main weakness of Uzbekistan is that the rapid increase in the number of tourists due to the exemption of tourist visas has resulted in the negative effects of over-tourism, such as difficulty in making reservations for transportation and accommodation and congestion at tourist sites. When the COVID-19 pandemic is over, and tourists return, there will be a shortage of capacity in transportation and accommodation facilities. In addition, in anticipation of the end of COVID-19, lodging facilities have been expanded rapidly in recent years, but the training of human resources has not kept pace in both quality and quantity, and there are concerns about a significant shortage of tourism personnel. In addition, government agencies have traditionally been strong, and the opinions of the

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<sup>4</sup> National Geographic Traveler Awards 2018, National Geographic Russia <https://nat-geo.ru/ng-club/podvedeny-itogi-golosovaniya-national-geographic-traveler-awards-2018/>

private sector tend not to be fully incorporated in the development of tourist attractions and legislation.

Opportunities include increasing Uzbekistan's presence in the UNWTO and the possibility of linking international cooperation frameworks such as the Shanghai Cooperation Organization (SCO) and the Turkic Council<sup>5</sup> with Uzbekistan's tourism development.

The threat is that the deterioration of the security situation in neighboring countries, including Afghanistan, will damage the region's image and adversely affect the number of visitors.

Table 1.4 summarizes the status of tourism development in Uzbekistan in a SWOT analysis.

**Table 1.4: SWOT Analysis of the tourism sector in Uzbekistan**

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>- Rich historical and cultural products (World Heritage sites, food culture), Golden Routes</li> <li>- Abundant tourism resources other than historical and cultural ones (nature, rural area, pilgrimage, urban infrastructure, etc.)</li> <li>- Open economic policy (investment promotion and visa-free)</li> <li>- Government reforms (aviation, accommodations)</li> <li>- Development of government and private sectors relating to tourism</li> </ul>	<ul style="list-style-type: none"> <li>- Congestion of tourist attractions, transportation, and accommodation</li> <li>- Lack of transportation services in the post-COVID-19 period</li> <li>- Shortage of human resources for tourism (supply may not be able to keep up with the rapid expansion of accommodation facilities)</li> <li>- Damage to resources due to tourism and urban development</li> <li>- Low share of tourism-related industries in GDP</li> <li>- Limited interagency information exchange, bureaucratic organization</li> <li>- Limited information exchange and lack of coordination between government and private sector</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>- Attitude to lead the tourism sector in Central Asia, including hosting the 25<sup>th</sup> UNWTO General Assembly</li> <li>- Active participation in international cooperation frameworks (SCO, Turku Council)</li> </ul>	<ul style="list-style-type: none"> <li>- Security and safety in Afghanistan</li> <li>- Security situation in neighboring countries</li> <li>- Deterioration of the national image and public safety due to influx of Islamic fundamentalists</li> </ul>

Source: Prepared by the study team

### 1.2.1. Uzbekistan's Potential for Tourism Development

#### Organizational structure of the tourism sector

In April 2021, the National Commission for Tourism Development and the Department of Sports of the Ministry of Culture and Sports were merged to form MOTAS. MOTAS has an attitude to lead tourism development in Central Asia and has been active in UNWTO. For example, Mr. Abduhakimov, Deputy Prime Minister and Minister of Tourism and Sports, worked as the Vice-Chairperson in the 24<sup>th</sup> Session of the UNWTO General Assembly organized in November and December 2021 Samarkand was chosen as the host city of the 25<sup>th</sup> Session of the UNWTO General Assembly<sup>6</sup>. Private hotels and tourist guides are also well developed, contributing to the development of tourism in Uzbekistan, improvement of services and dissemination of information, as well as lobbying for the healthy development of the industry.

Uzbekistan has been actively participating in international frameworks such as CAREC, SCO, and Turkic Council and is trying to promote tourism development not only in Uzbekistan alone but also in

<sup>5</sup> For the Turku Council, Refer to sections 7.1.4 and 10.8 of Part 1

<sup>6</sup> <https://twitter.com/UNWTO/status/1466458213331652609>

regional cooperation with other member countries. The development of tourism routes across-countries based on the Silk Road theme and promoting tourism clusters are expected to diversify tourism products and markets.

#### Legal system of the tourism sector

Since independence in 1991, tourism has been one of the priority sectors in Uzbekistan. Under President Mirziyoyev, who took office in 2016, the country has continued to pursue an open economic policy that encourages investment and international visitors, leading to a significant increase in the international visitor arrivals before the COVID-19 pandemic. This led to a significant increase in international visitors before the COVID-19 outbreak. In particular, as mentioned in section 1.3 of Part 1, measures have been taken to accelerate the development of tourism, develop domestic tourism, exempt tourism visas, and establish the Silk Road International University of Tourism and Cultural Heritage.

#### Tourism facilities and tourism infrastructure

The number of international visitors has increased significantly due to tourism promotion measures such as visa exemptions, and the shortage of capacity in accommodation and transportation facilities has become apparent. However, the Government of Uzbekistan has taken measures to address this problem. For example, it provides various incentives and subsidies for investment in accommodation and tourism facilities, as described in section 5.1.2 of Part 1. In the aviation sector, reforms have been underway since the promulgation of Presidential Decree No. 5584, "On Measures for the Basic Strengthening of Civil Aviation in the Republic of Uzbekistan," on November 27, 2018. For example, with the support of the World Bank, the spin-off of the state-owned Uzbekistan Airways and Uzbekistan Airports was realized, and the airline is working to strengthen its competitiveness by expanding its revenue streams and reducing costs in order to become a leader in the Central Asian market<sup>7</sup>.

#### Tourism resources and tourism products

As mentioned in section 4.2 of Part 1, Uzbekistan is a treasure trove of historical and cultural resources, with four World Cultural Heritage sites and nine World Heritage Tentative List sites. Among them, the Golden Route, which connects the four World Cultural Heritage sites of Samarkand, Bukhara, Khiva, and Shahrisabz, attracts tourists worldwide. As mentioned above, its food culture has also attracted attention in recent years, winning first place in the gastronomic tourism category of the 2018 National Geographic Traveler Awards. The country flourished as a strategic point on the Silk Road, and its diverse food culture, which is unique to a country where many different ethnic groups still live, is appealing. In the study in Uzbekistan, the study team heard that Russian tourists visit Uzbekistan for

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<sup>7</sup> Uzbekistan's Aviation reforms set Uzbek Airways on a sound pathway for becoming a market leader in the Central Asian region (2019, February 27). International Finance Corporation. <https://pressroom.ifc.org/all/pages/PressDetail.aspx?ID=16119>



weekend meals. In addition, wineries in Samarkand and Fergana Regions promote tourists' acceptance<sup>8</sup>.

In addition to the historical and cultural heritage sites already being used for tourism, Uzbekistan has a variety of tourism resources that have potential. However, their use for tourism is currently limited. For example, there are music, dance, and handicrafts registered as intangible cultural heritage by UNESCO. In addition, there is room for diversification of tourism products, such as experiences to get close to nature (skiing, mountain climbing, etc.) and stays in farming villages and Yurta camps, which are in demand in the European market as a combination of historical and cultural heritage tourism. There is also potential for pilgrimage tourism for Muslims from Southeast Asia and Buddhists from East Asia, with the mausoleum of Imam Ali Bukhari in the suburbs of Samarkand and the Buddhist site of Termez as destinations, respectively. Furthermore, 30 years after the collapse of the Soviet Union, Tashkent's metro station, housing complexes, hotels, museums, and other buildings from the former Soviet-era are attracting attention.

### **1.2.2. Challenges of tourism development in Uzbekistan**

#### Organizational structure of the tourism sector

In Uzbekistan, government agencies have traditionally been very powerful, and even non-governmental organizations are often "governmental NGOs" established under the government's initiative. In recent years, private-sector-led industry associations have been established, such as the Hotelier's Association and Guide Association, which are discussed in section 9.1.1 of Part 1, but the interviewees pointed out that the voices of the private sector are not sufficiently reflected in government policies. For example, Hotelier's Association has created its own standards for hotels, but this is because the standards set by the government (Uzbek Agency for Technical Regulation: UZSTANDARD) are not in line with reality, and there is a mismatch between the government and the field. There is a need for a framework to coordinate and strengthen cooperation between public and private organizations involved in the tourism sector. While MOTAS aims to diversify tourism products, it is necessary to identify areas where the public sector should take the lead in promoting, such as medical tourism and MICE, and areas where the private sector has the expertise, such as adventure tourism and agrotourism, and to take care not to duplicate the activities of the public and private sectors.

Inter-ministerial collaboration is also limited. For example, MOTAS aims to diversify its tourism products through various approaches such as sports tourism, agro & ethno-tourism, and youth tourism, while MIFT says that MOTAS' tourism development strategy is complicated and focuses on only three areas: religious and pilgrimage tours, eco- and adventure tours, and medical tourism. In order to promote

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<sup>8</sup> Japan External Trade Organization, "A New Tourism Development in Fergana Region."

<https://www.jetro.go.jp/biznews/2019/10/a43a1fd198dbcfb7.html>.

Japan External Trade Organization, "Responding to consumer preferences, protecting the commitment to the "Wines of Timur the Great"

<https://www.jetro.go.jp/biznews/2019/12/d2a357ba11b172fb.html>.

investment in the tourism sector, the two ministries need to align their efforts to attract investment under a unified strategy.

#### Tourism facilities and tourism infrastructure

Uzbekistan is promoting hotel construction through various incentives and subsidies to address the shortage of accommodation experienced in 2018 and 2019. Nine hundred fourteen hotels (41,000 beds) in 2018 are expected to be replaced by 3,050 hotels (13.5 thousand beds) in 2025, according to MOTAS. According to MOTAS, the number of hotels will increase from 914 (41,000 beds) in 2018 to 3,050 (130,000 beds) in 2025<sup>9</sup>. On the other hand, human resource development has not kept pace with the rapid increase in the number of hotels, and according to the Hotelier's Association, some hotels were built for subsidies but are not operating because they cannot secure employees. In the post-COVID-19 period, the challenge is to produce sufficient human resources in both quality and quantity. In addition, universities and other educational institutions that serve as places for human resource development are needed to secure teachers.

In 2019, before the COVID-19 outbreak, it was difficult to book air and high-speed train tickets due to the rapid increase in tourism, especially between Tashkent and Samarkand, where there are few rail and air flight services compared to the traffic demand of tourists and where there is a lot of business use<sup>10</sup>. The post-COVID-19 period is expected to see a similar situation again, and countermeasures are required. As air transport is undergoing reforms, the future will see reforms in rail transport, such as the development of trunk railroads, improved management, and privatization. In the future, harmonious development through inter-modal competition among automobiles, railroads, and airlines is desired.

#### Tourism resources and products

As mentioned in Section 5.1.3 of Part 1, MOTAS is trying to promote large-scale development of tourism facilities and urban development through private investment overseas. This is reminiscent of the bubble period in Japan when huge hotels and resort condominiums were built all over the country by taking advantage of the Comprehensive Recreational Area Development Law<sup>11</sup> (Resort Law) enacted in 1987. The huge hotels and resort condominiums developed at that time have led to a series of management deadlocks and bankruptcies, leaving a trail of environmental destruction and regional economic stagnation across Japan. Uzbekistan needs to prevent the kind of environmental destruction caused by resort development that has occurred in Japan, and at the same time, conduct sustainable

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<sup>9</sup> Based on data provided by the Investment Department of MOTAS.

<sup>10</sup> Refer to section 6.2 of Part I for details.

<sup>11</sup> The purpose of the Resort Law was to develop resort facilities in "areas of considerable size that include land with favorable natural conditions" in order to provide the public with leisure time, to promote depopulated and liberalized regions, and to increase domestic demand through private sector vitality. In order to achieve this goal, the law called for: (1) significant relaxation of regulatory measures related to environmental preservation; (2) preferential fiscal treatment; and (3) improvement of public facilities such as roads, water and sewage systems, and utilization of state-owned forests. Japan Federation of Bar Associations, "Resolution calling for the repeal of the Resort Law and the establishment of measures and laws for sustainable tourism." [https://www.nichibenren.or.jp/document/civil\\_liberties/year/2004/2004\\_4.html](https://www.nichibenren.or.jp/document/civil_liberties/year/2004/2004_4.html) (2021年10月 (viewed on March 7)).

development with full consideration for the natural environment. During the study in Uzbekistan, the study team also saw examples of historical and cultural heritage sites that have been ruined by inappropriate restoration. For example, in the Shah-i-Zinda in Samarkand, the tiles have been significantly altered from their original design due to "restoration," and their historical and cultural value has been seriously damaged. This is a situation where the historical and cultural value of the tiles has been severely damaged (refer to Figure 1.2). In order to inherit historical and cultural heritage for future generations, it is essential to develop and disseminate techniques for conducting detailed surveys, considering restoration policies, and carefully carrying out restoration work so as not to damage its value.



Source: Research Team

**Figure 1.2: Inappropriate restoration at the Shah-i-Zinda**

### Others

The tourism sector in Uzbekistan has given top priority to the response to the rapid increase in the number of tourists before the COVID-19 outbreak, and the perspective of promoting regional development through tourism promotion is weak. On the other hand, development partners are promoting projects aimed at regional development and are working on tourism promotion to achieve this goal. For example, USAID has implemented a project called Future Growth Initiative (FGI) to enhance regional competitiveness, create jobs, and raise incomes, and support the promotion of tourism, ICT, and textile industries. In Uzbekistan, "the disparity between urban and rural areas has been widening in recent years, and efforts are needed to eliminate the disparity<sup>12</sup>.

As mentioned in section 3.1 of Part 1, Uzbekistan's tourism share of GDP was 5.2% in 2019, lower than that of the Kyrgyz Republic (9.6%) and Georgia (26.7%). In terms of comparison by industries, its influence on the country's economy is limited compared to key industries such as agriculture, forestry, and fisheries, which account for 27.3%, and manufacturing, which account for 20.9% in 2019<sup>13</sup>.

<sup>12</sup> Ministry of Foreign Affairs of Japan, "Country-Specific Development Cooperation Policy Annex: Project Development Plan for the Republic of Uzbekistan as of April 2019.

<sup>13</sup> United Nations Statistics Division. (n.d.). Country Profile - Retrieved October 7, 2021, from <https://unstats.un.org/unsd/snaama/countryprofile>

### 1.3. Potential and challenges of tourism development in the Kyrgyz Republic

The strength of the tourism sector in the Kyrgyz Republic is the abundance of tourism products that take advantage of its natural resources. Issyk-Kul Lake, also known as the "Pearl of Central Asia," is the most important tourist destination in the country. The northern shore is a summer resort crowded with bathers, while the southern shore is dotted with places where tourists can experience the nomadic culture, such as Yurta camp<sup>14</sup> and falconry. Mountaineering and trekking in the Tien Shan Mountains and the Pamir Mountains is also a unique experience. In addition, the private sector plays a major role in developing the tourism industry, with private associations independently training and rating mountain guides and certifying tour guides. The country has successfully hosted three World Nomadic Games, and the image of the Kyrgyz Republic as a nomadic culture is being formed, which is also working in its favor. In the past, the number of people who visited Kyrgyzstan for its historical and cultural heritage was limited, but JICA is planning to implement a regional development and tourism promotion project based on the three World Cultural Heritage sites in Chui Region, and it is expected to promote the utilization of cultural resources.

On the other hand, in the Kyrgyz Republic, although tourism has been identified as a priority development sector in the National Development Strategy of the Kyrgyz Republic for 2018-2040, few laws and regulations on tourism have been issued. This is also supported by the fact that the Ministry of Tourism has not been established. Also, promoting the tourism sector as a core sector of the national economy is weak. Another major weakness is that the Department of Tourism has only nine staff members, and its budget for activities is dependent on the support of development partners. Furthermore, as tourism development progresses, environmental problems such as the deterioration of lake water quality and the increase of waste materials have become apparent.

**Table 1.5: SWOT analysis of the tourism sector in the Kyrgyz Republic**

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>- Tourism products utilizing natural resources (north shore and south shore of Issyk-Kul Lake, climbing/trekking)</li> <li>- Possibility of building a Nomad Culture brand</li> <li>- Utilization of historical resources (World Heritage sites, Tash Rabat)</li> <li>- Tourist resources in and around Bishkek</li> <li>- Tourism resources in the South (Osh and Jalal Abad, CBT website)</li> <li>- Democratic society and politics (Society is sensitive to Western trends)</li> <li>- Development of private sector</li> </ul>	<ul style="list-style-type: none"> <li>- Low priority is given to tourism development in economic development</li> <li>- Limited government resources (personnel, funds)</li> <li>- Lack of human resource development institutions (facilities, teachers)</li> <li>- Lack of winter tourism products</li> <li>- Making balance between tourism development and environmental conservation/protection (water quality, waste, biodiversity damage)</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>- Road improvement plans to improve intra-regional access by CAREC, etc.</li> </ul>	<ul style="list-style-type: none"> <li>- Conflicts with neighboring countries (Tajikistan), international issues (Xinjiang Uyghur Autonomous Region)</li> <li>- Security situation in neighboring countries</li> <li>- Deterioration of local image and public safety due to influx of Islamic fundamentalists</li> </ul>

Source: Prepared by the study team

<sup>14</sup> Yurta is a traditional felt mobile home used by the Turkic nomadic Kazakhs and Kyrgyz people. Almost the same ones are known as ger in Mongolia and pao in China.

Opportunities include the existence of CAREC's tourism development plan for the ABEC, as described in section 1.2 of Part 1, which is expected to create a tourism cluster featuring the Silk Road and Silk Road Bypass tourism routes and adventure/nature, wellness/spa, winter sports, recreation, culture, and MICE. It is expected to create a tourism cluster with features such as adventure/nature, wellness/spa, winter sports, recreation, culture, and MICE.

As for threats, in the southern part of the Kyrgyz Republic, the borders with Uzbekistan and Tajikistan are complicated, and the existence of enclaves in both countries has led to frequent border disputes. In addition, the situation in the Xinjiang Uyghur Autonomous Region and Afghanistan may have a negative impact on the image and security of Central Asia, including the Kyrgyz Republic.

Table 1.5 summarizes the situation of tourism development in the Kyrgyz Republic in terms of SWOT analysis.

### **1.3.1. Potential for tourism development in the Kyrgyz Republic**

#### Tourism resources and tourism products

The Kyrgyz people have successfully hosted the World Nomadic Games three times, the image of nomadic culture in the Kyrgyz Republic is being formed. On the southern shore of Lake Issyk Kul, tourists can stay at a Yurta camp and experience nomadic culture such as horse milk wine tasting, falconry, and cavalry games. There is a potential to expand the market by developing promotions that combine nomadic cultural experiences with traditional natural resources such as mountains and lakes.

Kyrgyzstan is blessed with rich natural resources such as mountains and lakes. It offers a wide range of activities that take advantage of its natural resources, such as lake bathing, mountain climbing, trekking, and horse riding. In the past, there were few activities that could be enjoyed in winter, but in recent years, with the support of development partners, efforts have been made to develop tourism products for winter tourism, which is expected to shorten the off-season.

As mentioned above, while many tourists visit the Kyrgyz Republic for its rich nature, the number of those who visit for its historical and cultural heritage is currently limited. However, JICA is promoting cultural resources, as evidenced by the planned implementation of a regional development and tourism promotion project based on three World Cultural Heritage sites in the Chui Region (the Burana Tower and Balasagun Ak-Besim site, and Krasnaya Rechka site). In addition, Tash Rabat, which is on the World Heritage Tentative List, remains a 15th-century trading post that still retains the atmosphere of the past, and according to interviews with tour operators, it is becoming increasingly popular due to its high historical value and good location.

In general, tourists visiting the Kyrgyz Republic rarely stay in the capital city of Bishkek and head for

local sightseeing spots such as Issyk-Kul Lake and the Tien Shan Mountains immediately after their arrival. However, there has been a growing interest in the former Soviet-era architecture scattered throughout Bishkek in recent years. In addition, foreign tourists to places such as Ala-Archa National Park on the outskirts of Bishkek have been limited, but tour operators have been found to have plans to develop tourism around the park. If business travelers staying in Bishkek can easily experience nature in the suburbs without traveling far, Bishkek's attractiveness as a city and increasing tourism income can be expected.

According to interviews with tour companies, the popularity of the southern part of the Kyrgyz Republic has been increasing in recent years, with more and more people visiting the area around Osh, the second-largest city in Kyrgyzstan, Jalal-Abad adjacent to the Fergana Basin, and Ozgen, the ancient capital of the Kara Khan Dynasty. Many of the courses are combined with those of Uzbekistan. In this area, ethnic clashes between Kyrgyz and Uzbeks have often occurred, such as the Kyrgyz uprising in 2010. In order to improve the livelihood of the residents, projects to promote the private sector, including tourism development, are being implemented by development partners such as HELVETAS. Although the region still has the World Cultural Heritage site of "Sulaiman-Too Sacred Mountain" in Osh, it is expected that tourism products will be further developed in the future. Although it is difficult to attract Japanese tourists, especially for group tours<sup>15</sup>, tourism promotion can contribute to the socioeconomic stability of the area.

#### Tourism service and tourism human resource development

In the Kyrgyz Republic, private tour companies and associations are actively working to develop the tourism industry while protecting the interests of business operators. For example, there is a high need for high-quality mountain guides in Kyrgyzstan, where mountaineering and trekking are popular. In response to this, KMGGA is training and rating mountain guides. The KCBTA, the umbrella organization of the CBT, rates guesthouses and Yurta camps based on its criteria.

#### Others

In the Program of the Government of the Kyrgyz Republic of development of the sphere of tourism for 2019-2023, it is stated that the region should be the center of tourism development. During the interview with the DOT, it was recognized that regional development through tourism promotion is a major theme. In the future, it will be necessary to promote not only inbound tourism but also domestic tourism, and it is possible that the resources and know-how of each region can be used to create unique experience-based tourism products such as agrotourism and traditional handicraft. In the private sector, CBT

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<sup>15</sup> According to the Ministry of Foreign Affairs of Japan's Overseas Safety Information, the Uzbekistan-Tajikistan enclave in Batken Region, the border areas between Uzbekistan and Tajikistan in Batken Region, and the border areas between Uzbekistan and Tajikistan in Osh Region and Jalalabad Region, is classified as the "Level 3: Do not travel." The other three regions are classified as the "Level 2: Do not travel unnecessarily."

projects are also being developed nationwide. Thus, in the Kyrgyz Republic, both the public and private sectors are united in the direction of promoting sustainable tourism development that does not overly rely on large-scale investments and that takes into consideration the natural environment and traditional culture, and it can be said that the public and private sectors share the significance of tourism development.

During the interviews in Kyrgyzstan, one of the factors behind the success of the OVOP (One Village One Products) project in Kyrgyzstan was that Kyrgyz people began to travel abroad, and what was popular in New York became popular in Kyrgyzstan six months later. In other words, what wealthy people in Bishkek want and what New Yorkers want to coincide. By incorporating overseas trends, there is a possibility of appealing to both the inbound and wealthy domestic markets.

### **1.3.2. Challenges of tourism development in the Kyrgyz Republic**

#### Organizational structure of the tourism sector

The DOT's work includes the formulation and implementation of tourism development strategies, the development and operation of promotional websites, and direct and indirect participation in overseas travel expositions, but the overall number of DOT staff is small at nine. As of July 2021, the DOT was developing a tourism development program for the period up to 2030, but due to the lack of human resources, the DOT was considering asking development partners to assist in the development of the program. DOT does not have its budget to create promotional printed materials in terms of budget. The DOT produces promotional materials when they can be produced as part of a development partner's project. In addition, the DOT participates in travel expos when there is room in the government budget, but when there is not, it participates with the budget of development partners, making its activities dependent on development partners for both human and financial resources.

The same is true for educational institutions where resources are scarce. In the interview with Bishkek State University, the interviewees said that the government allocates no budget and that 80% of the tuition is used to pay the salaries of the faculty. Perhaps because of this, the on-campus restaurants and hotel training rooms were notably inferior to those at the Silk Road International Tourism University, which were built to look real. They would like to collaborate with Japanese universities to invite Japanese students to summer school in the Kyrgyz Republic and send professors to Japanese universities to learn teaching methods.

#### Tourism Infrastructure

The overall ranking of the Kyrgyz Republic in the WEF's TCI is low at 110<sup>th</sup> out of 140 countries, with a particularly low ranking of 123<sup>rd</sup> in the area of environmental sustainability<sup>16</sup>. In the interviews with

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<sup>16</sup> World Economic Forum.(2019). Travel & Tourism Competitiveness Report 2019.

government and private organizations relating to the tourism sector, the issues of sewage and waste treatment were raised prominently. For example, according to an interviewee working for the CBT, there are sanatoriums and resorts in Issyk-Kul Lake that discharge sewage into the lake without treatment and sewage treatment problems are also occurring in the regions of Bishkek and Naryn. In addition, according to the Issyk-Kul Regional government, the maintenance of sewage treatment facilities is under the jurisdiction of the municipal government, but there is a general lack of such facilities. The garbage problem is also becoming more apparent. Various associations are picking up garbage at tourist sites and raising awareness of the garbage problem in the private sector. The DOT is also aware of this situation and has proposed the construction of a waste recycling facility at the SCO meeting.

### Tourism resources and tourism products

Seasonal changes in the tourism market are a common challenge for all five Central Asian countries, and the Kyrgyz Republic is no exception. According to interviews with HELVETAS, out of 130 tour guides in Karakol in the summer, only five have jobs in the winter. Due to this situation and the lack of support for winter tourism promotion by other development partners, HELVETAS is implementing the Sustainable Winter Tourism Development Project in Bishkek and Issyk-Kul Region starting in 2019 to support winter tourism promotion. In order to develop winter tourism products such as skiing and snowboarding tours, it is essential to have instructors with a certain level of skills and safety training, but there is a lack of such personnel in the country. In addition, it is necessary to diversify winter tourism products other than skiing, such as horse riding on snow and falconry.

### Others

Although tourism has been identified as a priority development sector in the National Development Strategy of the Kyrgyz Republic for 2018-2040, few laws and regulations on tourism have been issued in the Kyrgyz Republic. However, there are few laws and regulations on tourism, and it is not considered a high priority sector. The lack of human and financial resources in the DOT may be one of the reasons for this. In fact, in the WEF's TICI, the Kyrgyz Republic ranks 110<sup>th</sup> out of 140 countries in the area of tourism priorities.

The three regions of Osh, Jalalabad, and Batken in the southern part of the Kyrgyz Republic border Uzbekistan and Tajikistan in the Fergana Basin. There are enclaves of neighboring countries in Batken Region and enclaves of the Kyrgyz Republic in the territory of Uzbekistan. In addition, the border between the Batken Region of the Kyrgyz Republic and the Sogd Region of Tajikistan is complicated, and there are many areas where the border has not yet been demarcated. Villages located at the border of the complicated territory have historically been involved in conflicts with Tajik residents over land



and water resources, which are yet to be determined, and there is always a risk of conflict<sup>17</sup>. Most recently, in March 2021, Kyrgyz and Tajik forces clashed over water resources in the border region<sup>18</sup>. On the other hand, the Chinese Government's crackdown on the Muslim minority in Xinjiang has become a complex issue for Central Asian countries with large Muslim populations. In the interviews in Kyrgyzstan, the study team heard that tourists from China have stopped coming.

#### **1.4. Potential and challenges of tourism development in Kazakhstan**

The State Program for the Development of the Tourism Industry of the Republic of Kazakhstan for 2019-2025, the Strategy for the Development of Tourism in Kazakhstan, was developed as a priority area for diversification of the industry in accordance with the National Strategic Development Plan of Kazakhstan for 2025 and the Strategic Directions for the Long-Term Development of Kazakhstan for 2050. It aims to increase the share of the tourism sector in the GDP to 8% by 2025. The following seven issues have been identified for the tourism industry: (1) development of tourism resources, (2) improvement of transportation access to tourism destinations, (3) improvement of the quantity and quality of tourism products and services, (4) establishment of a favorable tourism environment, (5) promotion of investment in the tourism industry, (6) improvement of the efficiency of marketing and promotion of the national tourism brand, and (7) improvement of the management of the tourism industry.

Kazakhstan received about 8.5 million international visitors in 2019, the second-largest number of visitors among the five Central Asian countries, along with the Kyrgyz Republic. The main feature of the international visitor arrivals is that the number of visitors for business purposes is much higher than tourism. According to UNWTO statistics (refer to section 2.3 of Part 1), there were 6.7 million (estimated) domestic overnight visitors and about 10 million outbound visitors in 2019, and a large number of outbound visitors is another characteristic of Kazakhstan's tourism trends. The main destinations are the Russian Federation and the Kyrgyz Republic. On the other hand, according to the 2019 edition of the TTCI, Kazakhstan is ranked 80<sup>th</sup> and Kyrgyzstan 110<sup>th</sup>, with Kazakhstan ranking higher than Kyrgyzstan in all 14 pillar categories except International Openness. It is interesting to note that the Kyrgyz Republic is one of the main destinations for Kazakhs traveling abroad.

Kazakhstan's strengths in tourism development include the modern city represented by the capital Nur-Sultan City, cultural resources related to the Silk Road, which is common in Central Asia, and, in proportion to the size of the country, a large number of national parks and nature reserves, as well as a space station. In addition, seven LCCs operate in the country, and accommodation facilities are among the best in Central Asia, with 24 five-star, 71 four-star, and 85 three-star hotels.

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<sup>17</sup> Naoki Nihei, "Current Situation and Issues in the Fergana Basin, Central Asia: Focusing on the Perspective of Kyrgyzstan" <https://www.povertist.com/ja/ferganakyr/>

<sup>18</sup> Jiji Press, "Kyrgyzstan, Tajik clash over troops, water dispute in border region, 31 dead." <https://www.jiji.com/jc/article?k=2021043000972>

On the other hand, one of the weaknesses of the city is that although it has many high potential tourism resources, the main tourism activity is urban tourism, mainly in the cities of Nur-Sultan and Almaty, which is the center of business, and the utilization of the abundant tourism resources is limited, probably due to a large number of visitors for business purposes. In addition, the image of the country as a tourism destination has not been established. As a result, the number of visitors for tourism purposes is considered to be low. Furthermore, according to the questionnaire survey of tourism-related organizations<sup>19</sup>, inconvenient access to tourist attractions, low quantity and quality of tourist products and services, and poor quality of souvenirs are pointed out.

One of the opportunities to promote tourism in Kazakhstan in recent years is that the number of domestic tourists is rising due to the inability to travel abroad due to the COVID-19 pandemic<sup>20</sup>. The number of domestic tourists is expected to increase the number of actors providing tourism products and services and develop the tourism industry.

**Table 1.6: SWOT analysis for tourism development in Kazakhstan**

Strength	Weakness
<ul style="list-style-type: none"> <li>- Diversity of tourism resources (modern cities, culture, nature, space stations, etc.)</li> <li>- High number of business visitors</li> <li>- 7 LCCs in service in the country</li> <li>- Development of accommodation facilities in urban areas</li> <li>- Strategy formulated as one of the key industries by the National Strategic Development Plan</li> </ul>	<ul style="list-style-type: none"> <li>- Limited use of diverse tourism resources</li> <li>- Lack of national image as a tourist destination</li> <li>- Inconvenient access to tourist sites</li> <li>- Low quantity and quality of tourism products and services</li> <li>- Low number of tourism service providers</li> <li>- Poor quality of souvenirs</li> <li>- Low number of visitors for tourism purposes</li> <li>- Weak initiatives of tourism strategy implementing agencies</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>- Increase in the number of domestic tourists due to the spread of the COVID-19</li> <li>- Road and rail development plans to improve intra-regional access by CAREC, etc.</li> </ul>	<ul style="list-style-type: none"> <li>- Security situation in neighboring countries</li> <li>- Deterioration of regional image and public safety due to influx of Islamic fundamentalists</li> </ul>

Source: Prepared by the research team

As for threats, the security situation in neighboring countries, represented by Afghanistan, and the deterioration of public safety may degrade the region's image and reduce the number of visitors.

Table 1.6 summarizes the SWOT analysis of tourism development in Kazakhstan.

#### 1.4.1. Kazakhstan's Potential for Tourism Development

Kazakhstan is trying to diversify its industries from a resource-dependent economy to sustainable development and aims to promote tourism as one of its priority industries. The recent outbreak of the COVID-19 has made it clear that if the tourism industry relies only on inbound demand, it will become vulnerable as an industry. Therefore, to ensure the industry's resilience, it is important to stimulate demand for domestic tourism to support the industry in case of an emergency. From this point of view,

<sup>19</sup> The study team received responses from a total of eight organizations: local government organizations in charge of tourism, higher education institutions for tourism personnel, three travel agencies, and three tourism-related associations.

<sup>20</sup> <https://astanatimes.com/2021/07/number-of-tourists-in-kazakhstan-increased-by-10-in-2021-as-domestic-air-travel-grows-dramatically/>

the fact that Kazakhs, who tend to prefer overseas travel to domestic tourism, have started to pay attention to domestic tourism due to the spread of COVID-19 can be seen as a good opportunity to review domestic tourism resources and develop a healthy industry in the future.

#### Organizational structure of the tourism sector

In Kazakhstan, the Tourism Development Strategy was approved in May 2019, and the implementing body of the Tourism Development Strategy was defined as the Ministry of Culture and Sports. The Ministry of Culture and Sports consists of four committees: the Committee on Archives and Records Management, the Committee on Culture, the Committee on Tourism Industry, and the Committee on Sports and Physical Education. Kazakh Tourism was established as a state-owned enterprise<sup>21</sup>. Kazakh Tourism is leading the development of the tourism industry through (1) national marketing and promotion, (2) digitalization of the tourism industry, (3) analysis of tourism trends and information sharing, (4) creation of tourism products, improvement of existing tourism products, standard regulations, and investment support.

#### Tourism infrastructure

Kazakhstan has abundant natural resources, with 12 UNESCO biosphere preservation areas, ten nationally designated nature reserves, and 13 national parks. In June 2020, the Ministry of Ecology, Geology, and Natural Resources of Kazakhstan announced the promotion of ecotourism in national parks managed by the Ministry. In June 2020, the Ministry of Ecology, Geology, and Natural Resources announced that it would promote ecotourism in the national parks managed by the Ministry<sup>22</sup>. In order to promote ecotourism, the ministry will develop small-scale infrastructure in four national parks in the Almaty Region, including hiking trails, visitor centers, and huts with Wi-Fi access to ensure the safety of hikers<sup>23</sup>. The Ministry of Natural Resources, which usually prioritizes protection and conservation, has recognized the potential of ecotourism and has approved the use of national parks for tourism. It is expected that the number of tourists will increase with the development of necessary infrastructure. In the future, it is recommended that such efforts be gradually expanded while maintaining a balance with environmental conservation.

#### Tourism resources and tourism products

The Ministry of Ecology, Geology, and Natural Resources, as well as the Ministry of Culture and Sports, which supports the development of the tourism industry, have decided to utilize national parks for ecotourism, which will strongly support the creation of new tourism products and services in Kazakhstan. In addition, due to the outbreak of the COVID-19, outdoor activities are gaining popularity, and there is

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<sup>21</sup> <https://qaztourism.kz/ru/administration>

<sup>22</sup> <https://caspiannews.com/news-detail/kazakhstan-sees-hope-in-ecotourism-2020-6-12-48/>

<sup>23</sup> <https://astanatimes.com/2021/06/tourist-huts-to-be-build-in-almaty-mountains-to-improve-hiking-safety/>

potential for diversification of tourism activities, including not only winter sports such as skiing and skating but also summer resort use and trekking ecotourism, glamping, and bird watching.

#### **1.4.2. Challenges of Tourism Development in Kazakhstan**

The following are the main challenges in promoting tourism development in Kazakhstan.

##### Organizational structure of the tourism sector

As mentioned in the previous section, the tourism development strategy formulated in May 2019 is being implemented by Kazakh Tourism, a state-owned enterprise. However, in order to promote tourism development comprehensively, it is very important to collaborate not only with the tourism industry and investment promotion but also with relevant ministries and local departments, such as immigration and infrastructure development. Therefore, there are glimpses of weaknesses in the implementation system in order to strongly drive tourism development.

##### Tourism Infrastructure

In the questionnaire survey conducted in this study, it was pointed out that there are shortages in the development of roads and transportation networks, access roads to tourist sites, facilities in national parks and nature reserves, and toilets in tourist sites, which are urgent issues to be addressed in order to improve tourists' satisfaction. However, related to the issue of organization and structure, infrastructure development in tourist sites requires cooperation with relevant ministries and local governments. As mentioned above, the Ministry of Ecology, Geology, and Natural Resources has decided to use the national park for ecotourism and has been able to develop the necessary infrastructure, but when considering the use of other resources for tourism, the "Kazakh Tourism" organization is weak in terms of bargaining power. However, when considering the use of other resources for tourism, the "Kazakh Tourism" organization is weak in negotiating ability due to its positioning. In addition, it has been pointed out that there is a lack of high-quality accommodation facilities in rural areas, although accommodation facilities have been developed in urban areas.

##### Tourism resources and tourism products

In a survey of Kazakh tour operators conducted by Kazakh Tourism in April-May 2021<sup>24</sup>, five areas were identified as challenges in creating new tourism products: (1) lack of qualified service providers, (2) infrastructure development, (3) difficulty in creating profitable products, (4) unfair competition due to dumping, and (5) others (staff shortage, demand, seasonality, etc.). In the questionnaire survey of this study, the necessity of training professional guides with expertise was also raised in national parks that are expected to be utilized for ecotourism and trekking in the future. In particular, the limited number

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<sup>24</sup> <https://www.tourisonline.kz/projects/83>

of high-quality service providers in rural areas was cited as an issue. Tour operators suggested that educational activities for local communities with the potential to enter the tourism industry and study tours of each region for tour operators would be effective. A study tour for operators and media was planned from April to June 2021<sup>25</sup>. These efforts are expected to diversify and improve the quality of tourism products and services.

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<sup>25</sup> <https://www.tourisonline.kz/news/63>



## 2. Draft Tourism Development Strategy

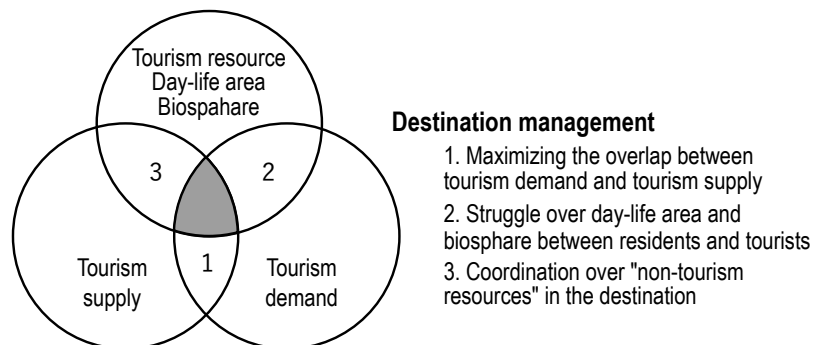
As summarized in Chapter 1 of Part 1, five Central Asian countries had prepared and implemented tourism development strategies with target years of 2024 to 2030 before the COVID-19 pandemic. However, due to the decline in the number of tourists and the stagnation of the tourism industry caused by the global spread of COVID-19, it became difficult to achieve the goals set in these strategies.

As the pandemic settles down and the tourism industry, including international tourism, resumes, Central Asian countries are expected to prepare their tourism development strategies again. Based on the results of interviews with the public and private sectors in Uzbekistan and the Kyrgyz Republic and the potentials and challenges of the tourism sector in each country as described in Chapter 1, this study summarizes the future direction of tourism development in the Central Asian region, Uzbekistan, Kyrgyz Republic, and Kazakhstan as the "Draft Tourism Development Strategy" in this chapter.

### 2.1. Draft regional tourism development strategy for Central Asia

As described in section 1.1, the idea of promoting tourism development in Central Asia as a single destination is supported from various points of view, such as history, society, tourism resources, and the thinking of people in public and private sectors in the five countries. In this section, the study team will discuss the draft tourism development strategy for the five countries as a whole or a part of them (multiple countries) as a single destination.

Figure 2.1 shows the concept of modern destination management. Conventional destination management has been concerned only with maximizing tourism supply and demand. On the other hand, modern destination management has added the perspective of "tourism resources, daily-life area, and biosphere" of the tour destination and has become more aware of the work related to the overlapping of these three circles (management of supply and demand, development of tourism resources, coordination and management of tourism resources, daily-life area, and biosphere, and building cooperation and interrelationship among related organizations).



Source: "The Project for Sustainable Development of the Cultural Landscape of the Upper Utcubamba Valley in the Republic of Peru Work Plan I," edited by the research team.

**Figure 2.1: The concept of modern destination management**

When considering a strategy for regional tourism development in Central Asia, where various players are involved, it is effective to summarize the strategy according to the items of the destination management, and then set up specific activities and coordinate each activity of the strategy. In the following sections, the study team will present the draft strategies according to the three categories of tourism resources, tourism demand, and tourism supply.

### **2.1.1. Cooperation to manage and conserve tourism resources**

As shown in Figure 1.1, Table 1.1, Table 1.2 and Table 1.3, Central Asia has a large number of multi-country World Heritage sites, as well as sites added to the World Heritage Tentative List and the Intangible Cultural Heritage List. In addition, there are many tangible historical and cultural heritage sites and intangible cultural sites that cross national borders. Joint efforts in conservation and research of these tangible and intangible assets will lead to the improvement of conservation techniques and experience and the discovery that each country has different characteristics despite having common features. As a result, the study team believes that this will lead to the development of tourism products that can explain to tourists the differences between the countries of Central Asia while maintaining their commonalities.

#### Exchange of cultural property conservation and research

Tangible cultural properties across the five Central Asian countries include Silk Road sites, Islamic architecture and art, and Buddhist sites, mainly Tajikistan and Uzbekistan. The Silk Road sites are the most representative of the region, and the Kyrgyz Republic and Kazakhstan, together with China, comprise the "Silk Roads: the Routes Network of Chang'an-Tianshan Corridor" (inscribed on the World Heritage list in 2014). The Kyrgyz Republic and Kazakhstan have three and eight sites included in this World Heritage site, respectively.

During the study in the Kyrgyz Republic, the study team interviewed at the Institute of History and Cultural Heritage of the Academy of Sciences of the Kyrgyz Republic. According to the interviewee, there are no specific plans for exchange with the Kazakhstan side regarding research on the conservation and future excavation of the components of the "Silk Road: Trade Route Network of Chang'an-Tian Shan Corridor. However, it is expected that researchers from various countries and UNESCO, which is cooperating in the preservation of Silk Road sites<sup>26</sup>, will exchange information and human resources on the preservation and research of Silk Road sites.

In addition, in section 1.2.2, the study team pointed out historical and cultural heritage examples that have lost their authenticity due to restoration without sufficient research. In order to prevent such a

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<sup>26</sup> In Kyrgyzstan, UNESCO and the EU jointly implemented the project "Silk Road Heritage Corridors" for the protection of tangible and intangible cultural heritage. Refer to section 10.2 of Part 1 for details.



situation, the experts of the Silk Road sites, Islamic architecture and art, Buddhist art, and other sites and cultural assets in Central Asia must exchange information and research on conservation and restoration techniques.

### Cooperation in environmental conservation and protection of flora and fauna in national parks and nature reserves

The natural resources that lie beyond the borders of Central Asia include the Western Tien Shan (a World Heritage Site across Uzbekistan, the Kyrgyz Republic, and Kazakhstan) and the Turan Lowlands (a desert area 0 meters above sea level from the Caspian Sea area to the western side of the Aral Sea), which are on the World Heritage Tentative List for Uzbekistan, Kazakhstan, and Turkmenistan. Kazakhstan, Turkmenistan, and Tajikistan also have many nature reserves that have become bird sanctuaries for migratory birds and habitats for wild birds.

It is expected that environmental conservation and protection of flora and fauna will be promoted in these national parks and nature reserves. Looking at the world's tourist destinations, especially in the Mediterranean Sea, North Atlantic Ocean, and the Caribbean Sea, promoting maritime tourism, cooperation in environmental conservation has been established within the region<sup>27</sup>. This kind of cooperation is due to the fact that the oceans are connected across national borders and in response to the recent climate change. The five Central Asian countries are also connected to their neighbors by land, and they share not only World Heritage sites and World Heritage Tentative list sites but also national parks and nature reserves with their neighbors. Additionally, birds migrate through habitats that cross national borders. It is desirable to promote the sharing of know-how and exchange of experts in environmental conservation and protection of flora and fauna in such places.

### Promote cultural exchange among countries

The five Central Asian countries also share cultural values among several countries, such as the nomadic culture of Kazakhstan and Kyrgyzstan (e.g., falconry and Yurta) and the Sogdian culture<sup>28</sup> of Uzbekistan and Tajikistan. In particular, food culture is shared among the five countries, including Plov, Shashlik, Laghman, Manti, Samsa, and Shorpo<sup>29</sup>.

However, these similar cultures are unique to each country and each region. 2.1.2 Section 2.1.2 addresses the promotion of mutual visits among the citizens of the five Central Asian countries. Such opportunities for the introduction and exchange of the daily culture of the people of the Central Asian countries (food,

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<sup>27</sup> Tonazzini, D., Fosse, J., Morales, E., González, A., Klarwein, S., Moukaddem, K., Louveau, O. (2019) Blue Tourism. Towards a sustainable coastal and maritime tourism in the world marine regions. maritime tourism in the world marine regions. Edited by eco-union. Barcelona.

<sup>28</sup> The culture originated from the Iranian people who were responsible for the Silk Road trade, such as the Iranian calendar.

<sup>29</sup> The website of the Ministry of Foreign Affairs of Japan has an explanation of the similarities in the diets of the five Central Asian countries. [https://www.mofa.go.jp/mofaj/erp/ca\\_c/page24\\_000897.html](https://www.mofa.go.jp/mofaj/erp/ca_c/page24_000897.html)

festivals, handicrafts, etc.) and understanding of their homogeneity and the differences among them will lead to the development of tourism products such as food, culture, handicrafts, and souvenirs that are unique to each country.

### **2.1.2. Joint activities to raise tourism demand**

#### Marketing and promotion of "Central Asia" to the global market

In order to develop a marketing strategy to promote the five Central Asian countries as a single tourism destination in the global market, the following two perspectives are required. The first perspective is to express the features and attractions of tourism in the five Central Asian countries in a single word, such as a slogan or a logo<sup>30</sup>, and the other perspective is the segmentation and matching of various tourism products to the market segments in the world, as summarized in sections 7.2 and 7.3 of Part 1. Both perspectives need to be coordinated with the studies being conducted at the national level in Central Asia. It is necessary to start the study by understanding the target markets of tourism products in each country. Then, it is necessary to develop cross-country tourism products and simultaneously consider where to market such products and where to market such products at the same time as developing cross-country tourism products.

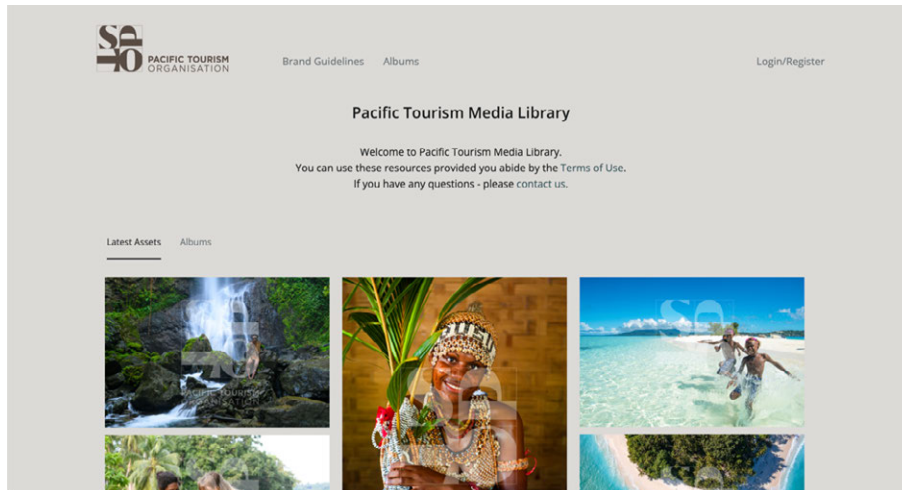
While conducting the above marketing activities, it is also necessary to disseminate information about Central Asia to the global market. The following three activities are necessary for the initial stage.

The first action is developing a tourism information website, which MOTAS of Uzbekistan is planning to implement, as well as the cooperation in exhibiting at tourism expositions, and the implementation of FAM trips to promote tourism in the five countries. Various patterns of cooperation in exhibiting at a tourism expo can be considered, such as joint exhibiting by multiple countries or countries participating in a tourism expo to make up for countries that cannot participate.

The second point is to create, archive, and provide materials for tourism promotion that the private sector can use. When the study team interviewed with tour companies in Japan, the team found that it is difficult to obtain good quality, copyright-free materials for promoting tourism products and that what tour companies in the origin countries want is to provide such materials to the government tourism agencies of the destination countries. Not only Japanese tour companies but also those in other origin countries have such needs in common. As tourism is increasingly becoming digitalized through the pandemic, providing copyright-free and free-of-charge tourism promotion materials are expected to bring the tourism of the five Central Asian countries to the attention of tour companies in the origin countries.

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<sup>30</sup> The followings are websites that summarize the slogans and logos of tourism around the world.  
<https://www.familybreakfinder.co.uk/holidays/map-every-countrys-tourism-slogan/>; <https://findthepearlstravel.com/country-tourism-slogans/>



An example of a regional tourism organization providing promotional materials (SPTO website; <https://spto.brandkit.io>)

The third point is tourism promotion activities in each country to promote mutual visits among the citizens of the five countries. In order to boost tourism in Central Asia, it is necessary not only to accept tourists from outside the region but also to promote tourism activities by the citizens of each country in Central Asia. As analyzed in Chapter 2 of Part 1, most visitors to the five countries are from neighboring countries and the Russian Federation. However, most of them are visiting relatives and acquaintances, and the number of tourists who stay overnight is still limited. Promoting tourism activities and understanding the history, nature, and current socio-culture of the neighboring countries by having the citizens of the five countries visit each of them should also be a pillar of the tourism marketing and promotion activities of the five Central Asian countries.

### **2.1.3. Cooperation for increase and improve tourism supply**

#### Cooperation in human resource development for tourism

As analyzed in Chapter 8 of Part 1, in Uzbekistan and the Kyrgyz Republic, where the study team visited, the development of human resources for tourism was a major issue, both in terms of increasing the number of human resources and improving the quality of human resources. This situation is probably the same in Kazakhstan, Turkmenistan, and Tajikistan. Comparing the human resource development for tourism in Uzbekistan with the Kyrgyz Republic, Uzbekistan is trying to establish a well-balanced curriculum of learning and practice by developing the Silk Road international university of tourism and inviting private universities from abroad, instead of focusing on classroom learning. On the other hand, the Kyrgyz Republic has not yet reached that level and has issued both in terms of facilities for tourism human resource development and in terms of software such as curriculum and teachers. Considering the development level of tourism, the situation of human resource development for tourism in Turkmenistan and Tajikistan seems to be similar to that in the Kyrgyz Republic. It is difficult to assess the status of human resource development for tourism in Kazakhstan but considering the fact that the country's

current tourism is focused on urban business tourism, it will be necessary to at least develop human resources for guides who introduce nature, history, and culture, and for tour companies who form and sell tourism products.

Under these circumstances, the cooperation in human resource development for tourism among the five Central Asian countries will enable Uzbekistan, which is in a more advanced situation in human resource development for tourism, to play a central role in the development of the management level involved in tourism. The Silk Road International University of Tourism in Uzbekistan is willing to accept students from abroad, and it can be proposed that the university actively accept students and young faculty members, especially from the surrounding Central Asian countries. At this time, it is also proposed that the public and private sectors related to tourism in the neighboring countries cooperate to establish a study abroad fund for tourism personnel and that students and young faculty members from the neighboring countries can use this scholarship.

In both Uzbekistan and the Kyrgyz Republic, the private sector related to tourism has developed, and associations such as hotel associations, operator associations, guide associations, and CBT associations are developing human resources and setting standards for tourism services. There is already a movement to develop and implement similar standards in Kazakhstan and Tajikistan based on the CBT service standards developed by KCBT in the Kyrgyz Republic<sup>31</sup>. The private sector in each country, including associations related to tourism, could develop such activities and cooperate with each other across countries in terms of human resource development. When considering a regional tourism strategy for Central Asia, it is necessary not only to consider the cooperation of government tourism-related organizations but also to consider the cooperation of the private sector and to prepare a forum for such cooperation.

### Improving tourism services

In Uzbekistan and the Kyrgyz Republic, where the study team visited, the major issue was not only the development of human resources for tourism but also the improvement of tourism services. Individual tourists on a micro-level can feel the results of the improvement of tourism services, but on the other hand, tourism services are one of the elements in the efforts to create a profile of the tourism sector in each country by indexing factors such as tourism resources and products, tourism facilities and infrastructure, and marketing and promotion. One of the most widely known indicators of the tourism sector is the Travel and Tourism Competitiveness Index (TTCI) of the World Economic Forum (WEF)<sup>32</sup>. Figure 2.2 shows the scores for Eurasia (CIS countries) in the 2019 edition of the WEF's TTCI. From this figure, Kazakhstan, Tajikistan, and the Kyrgyz Republic are judged to have lower tourism

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<sup>31</sup> Refer to section 8.3.2 of Part 1.

<sup>32</sup> For the World Economic Forum's Travel and Tourism Competitiveness Index, refer to section 3.2 of Part 1.

infrastructure (tourism service is classified as infrastructure here) as well as policies and openness to tourism than Russia, Ukraine, and the Caucasus countries. On the other hand, Uzbekistan and Turkmenistan do not participate in the WEF TTCI, and those countries are not included in Figure 2.2.

Global Rank	ENABLING ENVIRONMENT					T&T POLICY & ENABLING CONDITIONS				INFRASTRUCTURE			NATURAL & CULT. RESOURCES		
	Business Environment	Safety & Security	Health & Hygiene	Human Resources & Labor Market	ICT Readiness	Prioritization of T&T	Int'l. Openness	Price Compl'tness.	Environ. Sustainability	Air Transport Infrastructure	Ground & Port Infrastructure	Tourist Service Infrastructure	Natural Resources	Cultural Res. & Business Travel	
Russian Federation	39	4.3	5.1	5.7	5.0	5.3	4.4	2.2	5.3	4.2	3.2	3.3	4.1	3.8	2.7
Georgia	68	5.3	5.8	6.0	4.7	4.9	3.5	3.4	5.7	4.2	2.5	3.2	4.9	2.4	1.5
Azerbaijan	71	5.7	5.9	6.1	5.2	5.0	5.0	3.1	5.5	4.1	2.6	3.9	3.2	2.2	1.9
Ukraine	78	4.1	4.8	5.3	4.8	4.5	4.3	3.7	5.3	3.9	2.7	3.1	4.3	2.2	1.9
Armenia	79	5.0	5.8	6.0	4.8	4.7	4.7	3.2	5.7	4.0	2.4	2.8	4.3	2.6	1.4
Kazakhstan	80	4.7	5.6	5.5	4.7	5.0	4.3	2.6	5.5	3.8	2.7	2.9	3.4	2.6	1.7
Tajikistan	104	4.3	5.6	5.5	4.7	3.4	4.3	2.5	5.6	3.9	2.2	2.8	2.0	2.9	1.3
Kyrgyz Republic	110	4.4	5.2	5.7	4.3	4.0	3.8	3.9	5.7	3.7	2.0	2.1	2.1	2.5	1.5
<b>Eurasia Average</b>		<b>4.6</b>	<b>5.5</b>	<b>6.1</b>	<b>4.8</b>	<b>4.6</b>	<b>4.5</b>	<b>3.0</b>	<b>5.9</b>	<b>4.0</b>	<b>2.7</b>	<b>3.0</b>	<b>3.5</b>	<b>2.6</b>	<b>1.9</b>
<b>EUROPE AND EURASIA AVERAGE</b>		<b>4.7</b>	<b>5.8</b>	<b>6.2</b>	<b>5.0</b>	<b>5.4</b>	<b>4.9</b>	<b>3.7</b>	<b>5.1</b>	<b>4.7</b>	<b>3.6</b>	<b>4.1</b>	<b>4.9</b>	<b>3.1</b>	<b>2.6</b>

Source: Compiled from The Travel & Tourism Competitiveness Report 2019, World Economic Forum score table for Europe and Eurasia.

**Figure 2.2: World Economic Forum's Travel & Tourism Competitiveness Index (2019)**

One hundred forty countries worldwide participated in the WEF's TTCI in 2019. Being rated low here is a problem and needs to be improved, but not participating in this evaluation could be forgotten by the global tourism industry. Suppose each of the five Central Asian countries can improve their indicators. In that case, the global tourism industry's evaluation of the five Central Asian countries will also improve, just as Kazakhstan and Tajikistan have set WEF TTCI scores and rankings as targets in their tourism development strategies<sup>33</sup> and are working to improve them.

Creating a framework for regional cooperation with Uzbekistan's MOTAS at its core

In the short term, it is desirable for an organization that promotes regional tourism in Central Asia to have a system in which organizations in charge of tourism in each country cooperate. Among them, MOTAS of Uzbekistan, which is taking concrete steps to promote regional tourism, such as preparing to launch a website for tourism information of five Central Asian countries, should play a central role, while organizations in charge of tourism in the other four countries should provide information and dispatch human resources.

As summarized in Chapter 13 of Part 1, a common issue in the operation of regional tourism organizations around the world and regional DMOs in Japan is to secure financial resources for their activities. In the case of the five Central Asian countries, the first step is to start a common or multi-country effort with Uzbekistan, which has advanced tourism development in the region, and after some

<sup>33</sup> Refer to Table 1.9 and Table 1.11 of Part 1.

results are obtained, a decision will be made whether to establish a regional tourism promotion organization for the five countries or to continue to cooperate with the organizations in charge of tourism in each government. It would be more realistic to establish a regional tourism promotion organization for the five countries after some results are obtained.

#### **2.1.4. Promotion of digitalization in the tourism sector**

ICT technology is being used to innovate life and business in various economic activities around the world. In the tourism sector, ICT has had a significant impact on private companies involved in tourism, such as the dissemination of tourist information, sales of accommodation, airline tickets, and tour packages, etc. However, with the maturation of technology and the experience of the pandemic, the introduction of ICT technology will be taken to a higher level, and the digitization of public or government services will be promoted. In Central Asia, there is a shortage of human resources involved in tourism, and the scarce labor force may become a constraint for tourism development in the future, so it is desirable to introduce ICT technology to overcome this constraint. Japan is also concerned about the shortage of tourism human resources as its population ages, and the introduction of ICT technology is being advocated to compensate for this. In this context, it is expected that the digitalization of tourism in Japan will be adapted to Central Asia in the future. It is also necessary to overcome congestion at tourist sites such as that experienced in Uzbekistan before the COVID-19 outbreak.

On the other hand, most of the services using digital technology have a high ratio of operation and maintenance costs compared to the initial costs, and how to raise the operation and maintenance costs tends to be an issue. Although small payments through advertisements and electronic payments from users may be considered, such advertisements and electronic payments may become a world where platformers are active at the Central Asian level or globally. It is likely that the relationship between the tourism organizations in each country and the platformers will be developed concerning the relationship between the private sector and the platformers in each country. From this point of view, it is necessary for tourism organizations in each country to closely exchange information with the private sector and understand the development of the digitalization of tourism in the private sector<sup>34</sup>.

The following initiatives can be considered projects to promote the digitalization of tourism to be implemented within the framework of the five countries.

##### Unify the format and design of tourism information in each country

Suppose the development of tourism in the five countries is to be promoted in the future. In that case, it

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<sup>34</sup> In Uzbekistan, a tourism service called Uzbekistan Pass (<https://uzbekistanpass.com/>) has been operational since 2018. This service will allow foreign and domestic tourists to obtain, reserve, and purchase information on tourist attractions, accommodations, transportation, and guides. The experience of developing and operating such a service, for example, could be shared with neighboring countries and serve as a source of discussion on who and how to provide services that are similar to public and private goods.

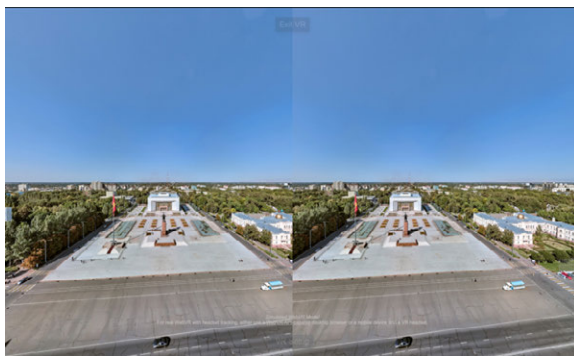
will be necessary to work on formatting and updating information on tourist sites and other information in the five countries, starting with constructing tourist information websites for the five countries, which MOTAS in Uzbekistan is trying to promote. If this idea is pushed further, it may lead to the unification of the format and design of information on tourism activities, such as the design of tourist information signs and the format of information provided at archaeological sites in each country, as well as the unification of the level of tourism services.

#### Provision of information on congestion at tourist sites and guidance and management of parking lots

A system will be developed and operated to monitor congestion at tourist sites and parking lots and avoid congestion at vacant tourist sites and parking lots. In Uzbekistan, where congestion at tourist sites and parking lots became an issue before the COVID-19 pandemic, there is an urgent need to develop such a system, and the pilot project should be implemented in Uzbekistan, and the results and lessons learned will be spread to neighboring countries.

#### Use of augmented reality (AR) and virtual reality (VR) to promote tourism and explain historical heritages

The "3D Kyrgyzstan" project<sup>35</sup> introduced in section 10.10 of Part 1 provides not only 3D images of each Kyrgyz province but also VR images of the same places. At travel expositions and other events, people can use VR headsets to experience tourist sites in various places of Kyrgyzstan, and if they have a VR headset, they can access the website to enjoy the VR images. The "3D Kyrgyzstan" project has already begun to expand to Kazakhstan and Tajikistan and can expand its activities not only to the Kyrgyz Republic but also to five other countries in Central Asia. It is expected that the DOT of the Kyrgyz Republic will lead the tourism organizations of the other four countries in this project and that the VR images will be expanded to tourist sites in the five Central Asian countries, and that information on tourist sites will be added and used as tourism promotional content for Central Asian.



VR image of Bishkek Aratou Square



VR video of the Tower of Brana

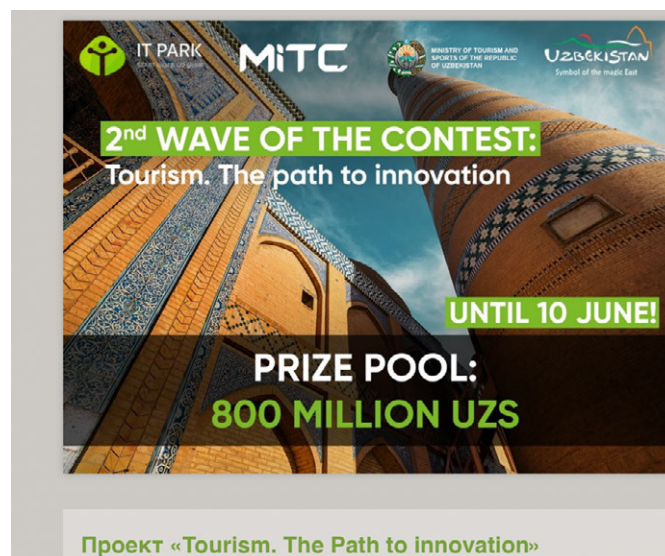
There is also the possibility of using AR and VR in historical heritage sites to recreate the way things

<sup>35</sup> <http://map.tourism.gov.kg/index.html>; <https://www.youtube.com/playlist?list=PLaqVCo2kHYYXBLwcbFNCM7qZpKXpdkWc5>

were used for interpretation. For example, Registan in Samarkand used to be a square where people in the city came and went before it was registered as a World Heritage site, but now it is a place where only people who have paid an entrance fee can enter. Currently, there is an audio guide, but recreating the scenery of the time when Registan was a town square by using AR and VR can add value to the historical heritage. DOT is planning to carry out the "Regional Development and Tourism Promotion Project Using World Heritage Sites in Chui Region" with the cooperation of JICA, and it is conceivable that AR and VR will be used to recreate the past of the Krasnaya Rechka and Ak-Beshim sites. However, the creation of explanatory content for these historical heritages must be supervised by experts who study the respective sites.

### Organize contests to promote digitalization of tourism

There are many possibilities for adapting digitalization to tourism-related activities, not only the mentioned initiatives. This is not something that can be answered by considering a few people but can be suggested by a wide range of people.



IT Park's "Tourism. The Path to Innovation" website

Uzbekistan's MOTAS, together with the Ministry for the Development of Information Technologies and Communications, supported the IT Park's "Tourism<sup>36</sup>. The Path to Innovation" project since 2020. This project is a contest for ICT technologies related to tourism services, with a prize of UZS 1.5 billion in 2020 and UZS 800 million in 2021. Such initiatives can be expanded to five Central Asian countries or held in each country to introduce highly rated services in each country.

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<sup>36</sup> IT Park in Uzbekistan is an organization established in June 2019 to promote IT entrepreneurship and IT education in the country. It has offices in Tashkent and six regions.



## **2.2. Draft tourism development strategy for Uzbekistan**

Uzbekistan has been affected by the global spread of COVID-19 when the tourism industry has been greatly boosted by the development of tourism products led by the private sector and by the government's reforms of the tourism sector since 2018 and was about to welcome further development. After the pandemic, it is important for Uzbekistan to (1) diversify its tourism, which has been developed mainly through historical and cultural tourism and the Golden Routes, (2) address the shortage of transportation infrastructure and accommodation facilities experienced in 2018 and 2019, and (3) to develop tourism human resources (human resource for accommodation facilities and guides) that will be in short supply in the future tourism development.

Based on this direction of development, the draft tourism development strategy outlines necessary efforts in four areas: tourism administration, tourism product development, tourism site, and facility development, and tourism service improvement.

### **2.2.1. Tourism administration: information analysis, planning, and coordination capacity enhancement**

MOTAS, which plays a central role in the administration of tourism, is one of the most active organizations in charge of tourism in the governments of the five Central Asian countries and is well endowed in terms of personnel and budget due to the support of national policies. In addition, Uzbekistan has a strong will to continue to play a central role in the tourism sector of the five Central Asian countries. With such a high level of ambition, what MOTAS will need in the future is to improve its coordination and planning capabilities.

Coordination capacity needs to be improved in two areas: (1) coordination in cooperation in the tourism sector with neighboring countries, and (2) coordination among organizations working on tourism development, including local governments and the private sector within Uzbekistan. In particular, for the coordination among local governments and the private sector in the country, it would be desirable to establish a forum to exchange opinions with representatives of local governments and the private sector (tourism-related industries). In the interviews with tour companies in this study, it was pointed out that the exchange of information between the government and the private sector on tourism development is still limited, and there is no common understanding of the challenges faced and the direction of tourism development. The study team believes that it is necessary to respond to these voices of the private sector. In addition, while the development of the regional capitals is proceeding under the initiative of the regional governments, it will be necessary for MOTAS to point out the perspective of balancing the protection and utilization of tourism resources.

In order to coordinate government tourism organizations in Central Asian countries and coordinate with the private sector, MOTAS needs to have a high capacity for information analysis and planning and to

conduct dialogues with tourism organizations of neighboring governments and domestic tourism development stakeholders with a deep understanding of the current situation of tourism development and a clear development direction. MOTAS plans to prepare a new tourism development strategy (2022-26) for the post-pandemic period. Adding a different perspective to the preparation of this strategy will improve MOTAS's capacity for information analysis and planning. For example, the following points should be considered in preparing the next tourism development strategy, which will increase the level of MOTAS' planning capacity.

- The setting of development targets: The number of tourists who stay overnight in Uzbekistan and the amount of money spent will be emphasized as target values more than day visitors. The spillover effects of tourism activities on related industries will also be emphasized as target values and analyzed.
- The balance between the number of tourists, accommodation facilities, transportation infrastructure, and human resources for tourism: Verify whether the number of tourists entering the country, which is targeted under the above development goals, will be balanced with the number of accommodation beds, the capacity of transportation infrastructure, and human resources for tourism, and create a scenario for development that will not fail.

## 2.2.2. Tourism product development (1): demarcation between the public and private sectors for diversification of tourism products

The need for diversification of tourism products was pointed out by both MOTAS departments and private tour companies during the interviews were conducted in June 2021. However, MOTAS and private tour companies have not yet shared information on how they are thinking about diversifying tourism products and have started to work on it. It is expected that this information will be shared in the dialogue between MOTAS and stakeholders of the tourism sector as described in section 2.2.1.

**Table 2.1: Role of government and private sector in the development of new tourism activities**

New tourism products	Government: MOTAS and other ministries and local governments	Private sector: tourism-related industries, real estate industry, and community
CBT, agro- & ethno-tourism	Create a framework for the development of tourism products (setting of service levels and consideration of natural and social environmental aspects)	Packaging of tourism resources and services, development of souvenirs, etc.
MICE & other business-related tourism and medical tourism	<ul style="list-style-type: none"> <li>- Development of MICE venues and attraction of investment for accommodation</li> <li>- Marketing and promotion, invitation activities</li> <li>- COE development and human resource development (e.g., medical tourism)</li> </ul>	Investment in conference and event venues, accommodations, and medical facilities

Source: Study team

In developing and commercializing new tourism products and services, it is necessary to clarify the division of roles between the Uzbek government sector, including MOTAS, and the private sector (refer to Table 2.1). In CBT and agro- & ethno-tourism, the role of the government is to create a framework

for tourism product development, such as setting service levels and indicating consideration for natural and social environmental aspects, while the private sector will play a central role in tourism product development. On the other hand, in business-related tourism such as MICE and medical tourism, the government needs to play a central role: developing MICE venues, attracting investments for accommodation, inviting events and international conferences, and developing Centers of Excellence (COE) and human resources development. The government needs to play an active role in the areas of MICE venue and accommodation infrastructure development, investment financing, the attraction of events and international conferences, development of Centers of Excellence (COE) in medical tourism, and human resource development, and through these activities, the government should show a scenario for tourism product development.

As described in 1.2.2, the contribution of Uzbekistan's tourism sector to GDP is lower than that of the Kyrgyz Republic and Georgia, and the challenge is to create a value chain for tourism. From this perspective, it is necessary to expand handicraft sales channels and develop tourism products that utilize food culture. Uzbekistan's handicrafts have lost the opportunity for tourists to see and purchase their products, especially during the COVID-19 outbreak. Japanese tour companies have been selling virtual tours that include a video introducing overseas tourist sites and souvenirs from those sites and have created specialty stores on their websites with a collection of overseas crafts selected by the tour company employees<sup>37</sup>. It is necessary to be sensitive to these new trends that have started during the pandemic and to market the contents of Uzbekistan's tourism sector.

It is expected that Uzbekistan Government and Tashkent City will develop places to sell handicrafts in Tashkent and to create a map of local products and handicrafts to introduce local products and handicrafts at tourist information centers that exist throughout the country. When the COVID-19 outbreak is under control and tourists return, it is expected that the private sector will develop tours where tourists can visit the places where these crafts are made, observe the production sites, and experience the craft-making process.

While the study team was interviewing public and private tourism stakeholders in Uzbekistan, many comments mentioned wine and food tourism in Georgia. The following is a brief history of the development of gastronomy tourism in Georgia.

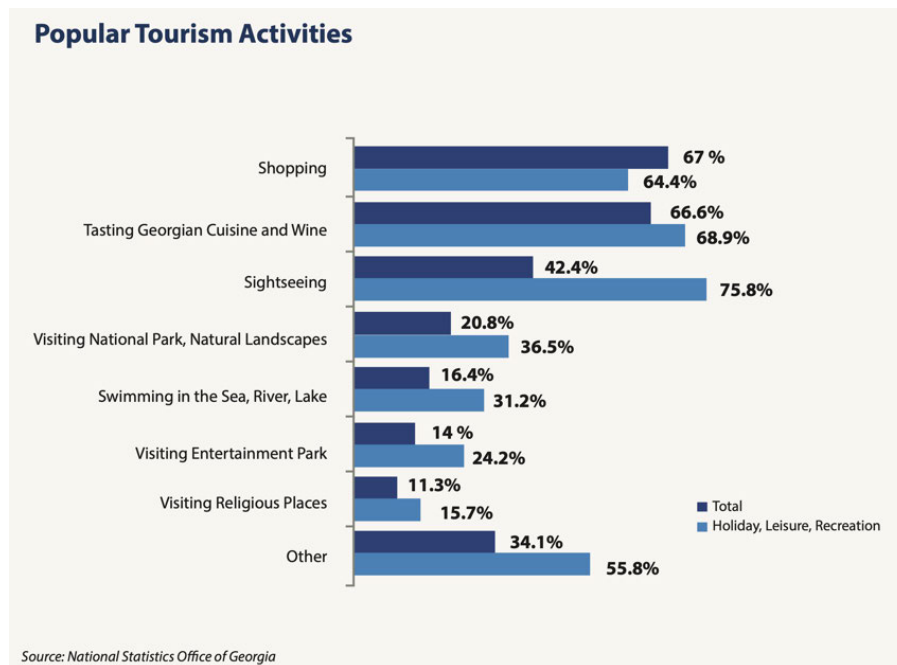
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<sup>37</sup> For example, the following are examples of specialty stores by tour companies in Japan: <https://www.his-j.com/ec/>; <https://kaze-travel.shop-pro.jp/>

### Gastronomic Tourism in Georgia

In 2000, Georgia had 390,000 international visitors and about USD130 million in international tourism revenue, but by 2019, the number of international visitors had increased to 7.7 million and international tourism receipt to USD1.12 billion. Contributing to this increase in international tourists and international tourism receipt was the promotion of tourism-related to the wine of which are considered to have originated in Georgia and food.

International visitors are mostly from neighboring countries such as Azerbaijan, Russia, Armenia, and Turkey. However, unlike the five Central Asian countries, more visitors came for "Holiday, Leisure, Recreation" (42.7%) than for "Visiting Friends, Relatives" (20.3%), and among the tourism activities, "Tasting Georgia Cuisine and Wine" is at the same high level as shopping and visiting tourist attractions.



Source: Georgian Tourism in Figures 2018, Georgian National Tourism Administration

Georgia's tourism promotion agency, the Georgian National Tourism Administration (GNTA), actively promotes wine and food tourism. It has produced wine and food brochures in several languages for European and Asian countries, as well as materials in English that introduce major wineries throughout the country. The brochures include information on the languages available at each winery, the number of tourist groups they can accommodate, whether or not wine tasting is available, whether or not the accommodation is available, and whether or not facilities for the disabled are available.

Like the cuisines of the five Central Asian countries, Georgian cuisine has influences from West Asia, East Asia, the Middle East, and Europe. In Japan, a Japanese restaurant chain's arrangement of the Georgian dish "Shkumerli" became a hot topic, and it was expanded into retort dishes and cup noodles. For Japanese people, the Caucasus region, such as Georgia, has been a less familiar destination than Central Asia, but the fact that Georgian cuisine has become a topic of conversation has provided an opportunity to introduce Georgia's wine culture and Georgia as a tourist

destination<sup>38</sup>.

In September 2016, UNWTO's 1st UNWTO Global Conference on Wine Tourism was held in the Kakheti region of Georgia. The Georgia Declaration on Wine Tourism on sustainable tourism development using intangible cultural heritage was adopted. Mr. Zurab Pololikashvili, who served as the Minister of Economic Development of the government (in charge of GNTA) from 2008 to 2009, has served as the Georgian representative to UNWTO and has been the Executive Director of UNWTO since January 2018. The 112th meeting of the Executive Council was held in Tbilisi, where the Tbilisi Declaration on the Sustainable Recovery of Tourism from COVID-19 was adopted. In this way, Georgia has been active in international cooperation in tourism, especially in UNWTO.



### 2.2.3. Tourism product development (2): Development of new tourist destinations and facilities

While section 2.2.2 describes the diversification of tourism products from the perspective of the development of tourism products other than historical and cultural tourism, the development of tourism in places where little tourism has been conducted in the other aspect of product diversification. Two new tourist destinations are the Fergana Basin, located to the east of the Golden Route, and Karakalpakstan, located to the west of the Golden Route.

The three regions of the Fergana Basin (Fergana, Namangan, and Andijan) are attracting attention as craft production areas and as regions with different cultures from the many regions of Uzbekistan. It is desirable to form a tourism route that connects cities with Osh and Jalalabad in the Kyrgyz Republic, but it is also possible to develop a tourism product that tours cities in the three regions (Kokand, Rishitan, Margilan, Andijan, Namangan) without crossing the border.

The Autonomous Republic of Karakalpakstan has supported USAID and GIZ in the tourism sector. The Igor Savitsky Memorial National Art Museum of the Republic of Karakalpakstan in Nukus, the capital

<sup>38</sup> <https://globe.asahi.com/article/14392665>

of the autonomous republic, has become famous for its collection of avant-garde art from the former Soviet era. The ship graveyard in Muinak, the Kyzylkum Desert, and the ruins of the Kingdom of Khorezm are also major tourist attractions. In order to promote tourism development, it is necessary to develop transportation infrastructure and tourist facilities.

According to an interview with the Department of Diversification of Services of MOTAS, the department plans to install roads, water supply, Wi-Fi, and information boards at 300 sites in archaeological sites and tourist attractions across the country. A budget of UZS1 trillion has been set aside for this activity, and the project is expected to be completed in the next two years. It is expected that the project will go ahead even if there are delays in the construction schedule due to the pandemic.

On the other hand, the Department of Investment is preparing several plans to develop large-scale tourism facilities by attracting foreign investment, but it is necessary to consider the natural environment and fully coordinate with the development of tourism by the private sector in Uzbekistan.

The Government of Uzbekistan is planning to construct the Great Silk Road Museum Samarkand, which will utilize ICT technology while referring to representative museums worldwide. The Government expects to obtain the cooperation of Japan in terms of the participation of the private sector in the operation of the museum.

#### **2.2.4. Human resource development: human resources for accommodations and guides**

As the development of tourism in Uzbekistan progresses, the most important issue will be to secure human resources for tourism to meet the increase in the number of tourists. In particular, it is expected that there will be a shortage of personnel to provide services in accommodation facilities and guides.

For human resource development of accommodation facilities, especially management personnel, it is necessary to disseminate the balanced education of theory and practice provided by the Silk Road International Tourism University and private universities to national universities' existing tourism human resource development courses. In conjunction with this, the Silk Road International Tourism University needs to develop its curriculum and bring in faculty members from around the world for both theoretical and practical aspects.

Human resource development also requires cooperation between MOTAS and the private sector. The Hoteliers' Association, which consists of medium-sized hotels, has set up a training institute to develop human resources who can work in hotels. For example, it has been decided that the Hoteliers' Association training institute will be used to retrain personnel already working in accommodation facilities, and MOTAS will provide financial support, in exchange for which hotels and restaurants will be asked to send lecturers to universities and colleges. A cooperative relationship could be established where MOTAS would act as an intermediary between the two parties (Hoteliers' Association and

universities and colleges). Also, MOTAS and the Guide Association can cooperate to develop curricula and guide examinations (including re-testing for those who have already taken the guide examination).

### **2.3. Draft tourism development strategy for the Kyrgyz Republic**

The main tourism products in the Kyrgyz Republic have so far been natural resource tourism, represented by full-scale mountain climbing and trekking, and CBT using natural resources. On the other hand, the image of Kyrgyzstan as a country with nomadic culture is gradually spreading, especially in West Asia and the Middle East, due to the World Nomadic Games<sup>39</sup> that started in 2014. In addition to that, the excavation of archaeological sites, including the remains of the Silk Road, has been progressing gradually, and the momentum to utilize historical and cultural resources for tourism is growing.

On the other hand, an overview of the public and private organizations related to tourism in the Kyrgyz Republic shows that the organizations in charge of tourism at the national and regional levels are lacking in both human resources and funds, but the private sector, mainly in Bishkek and Osh, is growing. CBT is thriving among the five Central Asian countries, thanks in part to the support of development partners, and the production of felt products and food products using local resources is also active, thanks to the activities of OVOP, which is supported by JICA. It is desirable to develop tourism in a way that the private sector supports the government sector, which tends to lack human and financial resources. The draft tourism development strategy from this perspective is shown below. The draft tourism development strategy outlines the necessary efforts in four areas: tourism administration, marketing and promotion, tourism destination development, and human resource development.

#### **2.3.1. Tourism administration: cooperation with the private sector to overcome limited human and financial resources**

As of June 2021, the DOT of the Kyrgyz Republic has nine official members, and there are only two official members in charge of the tourism sector in the Issyk-Kul regional government. The number of officials involved in tourism in the central and regional governments is limited. It is essential to cooperate with the private sector to promote tourism administration. Specifically, there are three main tasks: development and monitoring of service standards for accommodation facilities and guides (including mountain guides as well as tourist guides), research and study on tourism, marketing and promotion, and development of human resources for tourism. Marketing promotion, tourism product development, and human resource development are discussed in sections 2.3.2 and 2.3.4.

According to the interview with DOT in June 2021, DOT has started to consider the tourism development strategy up to 2030 with support from ADB. The new strategy is currently in the draft

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<sup>39</sup> The World Nomad Games have been held every other year since 2014.

stage and coordinated with relevant ministries and agencies. In the next tourism development strategy, it is expected that the strategy will be more rational and logical than before, including the setting of development targets and the balance among the number of tourists, accommodations, transportation infrastructure, and human resources for tourism, as pointed out in the formulation of the next tourism development strategy for Uzbekistan in section 2.2.1.

### **2.3.2. Marketing and promotion: focus on nature tourism and nomadic culture**

As mentioned earlier, tourism in the Kyrgyz Republic should be conducted through marketing and promotion that fully emphasizes nature tourism and nomadic culture. It is also necessary to set up regular opportunities for dialogue with the Kyrgyz Association of Tour Operators (KATO), KCBTA, etc., so that the private sector can develop tourism products that make use of nomadic culture in line with this marketing and promotion policy, and to promote tourism development in the same direction.

As mentioned earlier, the DOT has limited human resources, so it is essential to obtain the cooperation of the private sector in the implementation of marketing and promotion. For example, the Government of the Kyrgyz Republic may ask associations and companies participating in tourism expositions and exhibitions, to which the DOT cannot dispatch personnel, to promote tourism on its behalf, and may outsource the implementation of FAM trips and the construction and operation of websites to the private sector.

### **2.3.3. Tourism product development: development of historical and cultural resources and consideration for the environment**

Kyrgyzstan is home to rich tourist sites related to the Silk Road, including the Silk Road: Silk Roads: the Routes Network of Chang'an-Tianshan Corridor and Sulaiman-Too Sacred Mountain of which are registered as World Heritage sites. Excavations have been conducted by the Institute of History and Cultural Heritage of the National Academy of Sciences. The DOT intends to start a project of regional and tourism development project by using the World Heritage site with JICA's support. It is expected that this kind of movement will spread throughout the country. In the southern part of the Kyrgyz Republic, HELVETAS and USAID are implementing the CBT projects, and it is expected that routes will be formed to visit CBT sites starting from southern cities such as Osh and Jalal-Abad.

Bishkek, the capital city, retains the atmosphere of a calm, former Soviet-era city while Nur-Sultan City of Kazakhstan and Tashkent City, and Samarkand City of Uzbekistan are undergoing urban development on the largest scale, and the city's appeal is expected to increase in the future. While family tourists from the Middle East can be seen in the city, there is potential to market MICE and wellness tourism in Bishkek in the future. Bishkek is the gateway to Kyrgyzstan, and it is necessary to strengthen the gateway function of Bishkek such as reopening the National History Museum and developing a



museum to introduce the nature, flora, and fauna of Kyrgyzstan.

Issyk-Kul Lake, along with the mountains of the Tien Shan Range, is one of the representative nature tourism sites in Kyrgyzstan. Sanatoriums and lodging facilities have been constructed on the northern shore, and in recent years, Yurta campsites have been constructed on the southern shore. Environmental measures and conservation, such as protecting the water quality of Issyk-Kul Lake, is major issue for existing nature tourism sites. In places close to cities, environmental measures can be taken with a certain amount of investment, such as the construction of sewage treatment facilities, but in places far from cities, such as Lake Song Kul in Naryn Region, for example, it is necessary to take environmental measures in a way that minimizes life-cycle costs.

#### **2.3.4. Human resource development for tourism: cooperation with the private sector and use of digital technology**

In the Kyrgyz Republic, more than in Uzbekistan, the government does not have the financial and human resources to develop human resources for tourism, and cooperation with the private sector in human resource development is essential. It is considered necessary to focus not only on the existing secondary and higher education facilities but also on-the-job training after the human resources are employed in the tourism industry. In addition, the population of the Kyrgyz Republic is about 6.5 million, and the total number of all employed people is about 2.1 million. The shortage of human resources may become a constraint in future tourism development. It is expected that the digitalization of tourism will contribute to the efficient use of limited human resources.

### **2.4. Draft tourism development strategy for Kazakhstan**

In this study, the study team could not visit Kazakhstan and only collected and analyzed information through statistical data and written materials. Therefore, although the study team was able to understand only a limited part of the tourism sector in Kazakhstan, it was able to identify the following characteristics: international tourists, especially those from neighboring countries and Russia, are business tourists; most international tourists stay in only two cities, Almaty and Nur-Sultan.

#### **2.4.1. Development of tourism product: development of natural and historical/cultural resources**

Kazakhstan should develop its natural resources and historical and cultural resources by making the most of its vast land area. The first step should be to form tourism routes connecting the cities of both countries with the regions and cities located west of Almaty Region (Jambul Region and its capital Taraz, Shymkent, South Kazakhstan Region, and its capital Turkistan), taking advantage of the connections with the neighboring countries Uzbekistan and the Kyrgyz Republic. As shown in section 4.4.2 of Part

1, most of Kazakhstan's natural and historical resources are distributed in the vicinity of Taraz, Shymkent, Turkistan, and Almaty.

As described in section 2.3.2, Kyrgyzstan is becoming recognized as a country with nomadic culture, and Kazakhstan's falconry is also registered in UNESCO's World Intangible Heritage list (refer to Table 4.8 in Part 1). In the Kyrgyz Republic, the country is small enough to allow easy access to nomadic culture, but in Kazakhstan, the authenticity of nomadic culture is marketed, and the same nomadic culture can be segregated.

#### **2.4.2. Tourism administration: review of tourism-related organizations of the central government and activation of provincial and municipal governments in tourism development and promotion**

Kazakhstan is a large country, and the regional and city governments play major roles in implementing tourism, starting from the cities indicated in the previous section. Almaty City is already an established tourist destination, and the Almaty City serves as a starting point for natural tourist destinations in the surrounding Almaty Region. Creating a similar system in Jambul Region, Shymkent City, and South Kazakhstan Region is necessary. For this purpose, it is essential that not only the central government but also the regional and city governments engage in dialogue with the central and local governments of Uzbekistan and the Kyrgyz Republic in formulating cross-country tourism routes (refer to section 3.3), and that the regional and city governments are involved in tourism marketing and promotion.

As mentioned in section 1.4.1, Kazakhs, who prefer overseas travel to domestic travel, have begun to pay attention to domestic tourist attractions due to the COVID-19 pandemic. It is necessary to take this trend as an opportunity to promote domestic tourism. According to the questionnaire survey conducted in this study, the private sector also sees the increasing trend of domestic tourists as an opportunity. The increase in the number of domestic tourists is expected to increase the number of actors involved in the tourism industry and improve the quality accordingly. The government of Kazakhstan is aiming to diversify its industries as a national strategy. It is expected that the promotion of domestic tourism will contribute to the development of a resilient tourism industry.

Kazakhstan's tourism development strategy is formulated and implemented by the Tourism Industry Committee under the Ministry of Culture and Sports, and by Kazakh Tourism, respectively. However, in the implementation of the tourism strategy, there are some areas where Kazakh Tourism has not been able to fully coordinate with tourism-related ministries and local governments. Since tourism involves various stakeholders, a high level of coordination skills is required in the planning and implementation of tourism administration and tourism development. Therefore, it would be desirable to examine the organizational structure of the tourism in the government of Kazakhstan.

### **3. Multi-country tourism development**

#### **3.1. Creation and improvement of mechanisms for the formation of cross-border tourist routes**

CAREC is planning to develop transportation and border control infrastructure to facilitate the movement of people and goods among the member countries, and at the Central Asian level, the introduction of the Silk Road Visa has been proposed. In order to promote tourism in the five Central Asian countries, it is necessary to cooperate with these efforts. At the same time, in order to advance these efforts, it is possible to create a mechanism to overcome the challenges in the formation of cross-border tourism routes or improve the existing mechanism. For example, it is necessary to create rules in the following areas for cross-border tourism.

- Bus operation: whether it is possible to operate the bus across the border. In the case of the Greater Mekong Region in Southeast Asia, tourists traveling from Thailand to Vietnam take a bus from Thailand to Lao PDR but change to a bus from the Vietnamese side at the Laos-Vietnam border.
- Border procedures when crossing the border by rail: Making rules on conducting immigration, customs clearance, and quarantine when crossing the border by rail.
- The activity of tour guide: whether to allow cross-border guiding activities. As pointed out in Chapter 4 of Part 1, many historical and cultural tourism resources are distributed across national borders, and situations will likely arise where it is difficult to find a guide when leaving an urban area.

The movement of tour companies (land operators that form tourist routes) from each country to cooperate and collaborate across borders is expected to be an activity of tour companies' initiative. However, it would be possible to support the participation of tour companies and tourism associations in tourism exhibitions.

#### **3.2. The role of government tourism organizations in creating tourism routes**

The creation of a mechanism for the formation of cross-country tourism routes in the Central Asian region, as described in section 3.1, requires the cooperation of the governments of the five countries. On the other hand, the formation of individual tourism routes will involve the governments and the countries' private sector along the route.

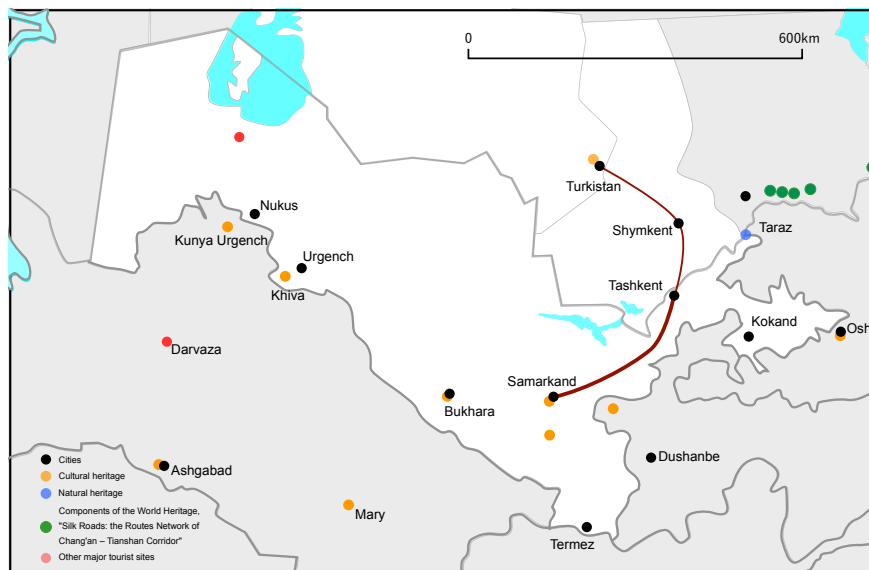
Since the private sector will be responsible for the development of tourism products, the roles of the government organizations in charge of tourism in each country are to develop infrastructure such as land transportation (roads, railroads, border facilities), coordinate stakeholders involved in tourism development, manage tourism resources and natural resources, and promote tourism at the national level. The roles of the organization in charge of tourism in each country are to create an environment that

facilitates the private sector to work on the formation of tourism routes by developing infrastructures such as land transportation and border facilities, coordinating stakeholders involved in tourism development, managing historical and cultural resources and natural resources, and promoting tourism at the national level. In the next section, examples of cross-border tourism routes that may be developed in the future are presented.

### 3.3. Examples of cross-border tourist routes

#### 3.3.1. Islamic pilgrimage in Uzbekistan and Kazakhstan

The Shahi Zinda mausoleums in Samarkand are closely linked to the legend that Kusam ibn Abbas, a cousin of the Prophet Muhammad, visited the site during the Arab invasion of Samarkand in the 7<sup>th</sup> century to propagate Islam and was buried there at the same time and the mausoleums are regarded as a holy place by Southeast Asian Muslims<sup>40</sup>. The Hoja Ahmad Yasavi Mausoleum in Turkistan contains the tombs of the 12th-century saint Hoja Ahmad Yasavi and successive leaders of the Yasavi cult. The mausoleum is one of the holiest sites for Muslims in Central Asia, and a visit to the Yasavi mausoleum is considered a good deed, superior to a pilgrimage to Mecca.



Source: JICA research team

**Figure 3.1 Islamic pilgrimage tourism in Uzbekistan and Kazakhstan.**

If these two holy sites could be connected by rail or road, it would be an attractive tourist route for the people of both Uzbekistan and Kazakhstan<sup>41</sup>, as well as for Muslims in Asia. Uzbekistan's high-speed railroad, the Afrosiyob, is currently undergoing a project to connect Turkistan - Shymkent - Tashkent in cooperation with the governments of Uzbekistan and Kazakhstan. In the future, this railroad will

<sup>40</sup> The Central Asian region played a major role in the process of the introduction of Islam to Southeast Asia, just as it did in the introduction of Buddhism to East Asia.

<sup>41</sup> Turkistan and Shymkent are also home to many Uzbeks, and these people can also be targeted.

make it easier to travel between Samarkand and Turkistan, which will increase the attractiveness of this tourist route.

This tourism route targets the people of Uzbekistan and Kazakhstan in the short term and the people of Southeast Asia, mainly Indonesia and Malaysia, in the medium to long term.

### 3.3.2. Sightseeing of Silk Road sites in the Kyrgyz Republic Kazakhstan and Uzbekistan

This route will connect the World Heritage sites of the Kyrgyz Republic, and Kazakhstan, which are included in the World Heritage site the " Silk Roads: the Routes Network of Chang'an-Tianshan Corridor" and will also connect the Silk Road sites in Uzbekistan in the future. The route will run from the Bishkek area of the Kyrgyz Republic to Taraz in Kazakhstan. Uzbekistan, along with Turkmenistan and Tajikistan, aims to include the "Silk Road: Silk Roads: Zarafshan - Karakum Corridor" in the World Heritage list, and the candidate sites in Uzbekistan are located around tourist cities such as Samarkand and Bukhara. The final route will be Bishkek - Taraz - Shymkent - Tashkent - Samarkand - Bukhara.

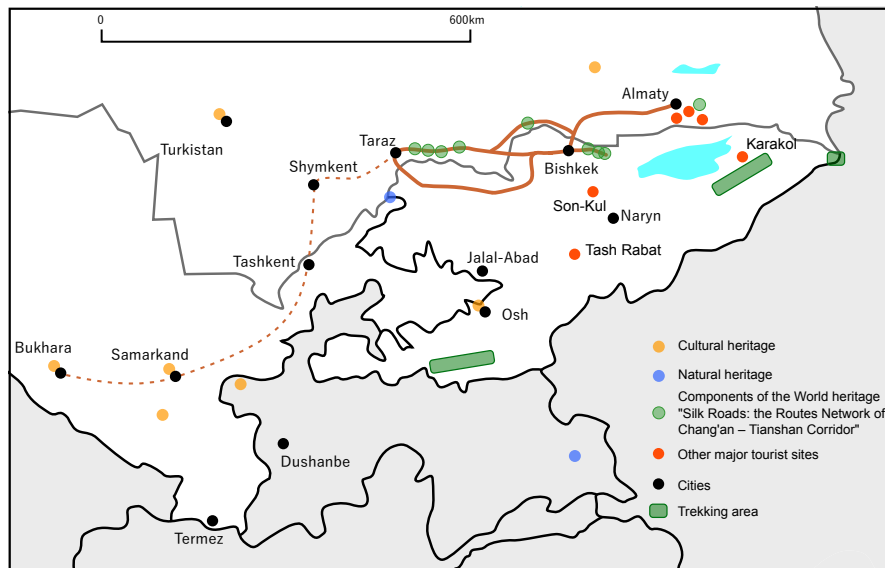


Figure 3.2 Silk Road sites in the Kyrgyz Republic, Kazakhstan, and Uzbekistan.

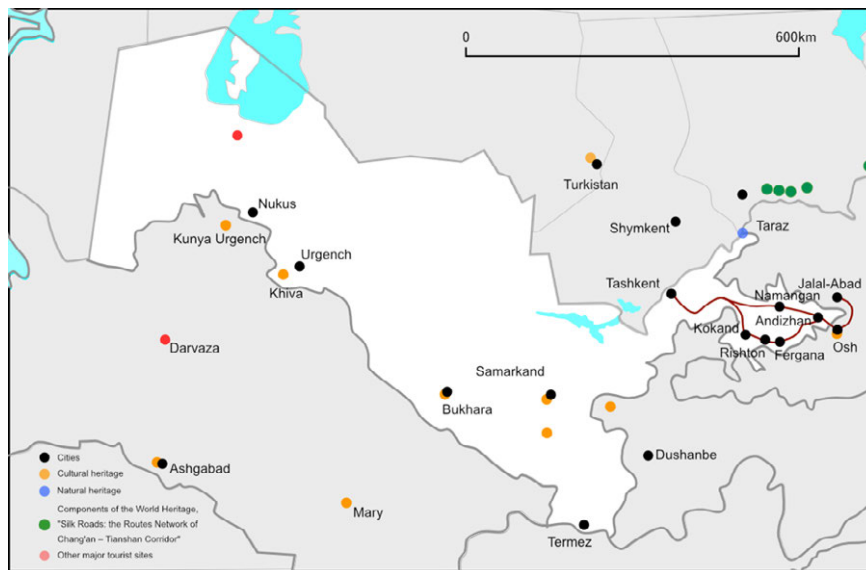
The target tourists will be European, American, and East Asian (Japanese and Chinese) tourists interested in the Silk Road.

### 3.3.3. Cultural tourism in the Fergana Basin of Uzbekistan and the Kyrgyz Republic

Uzbekistan's Fergana Basin (Fergana, Namangan, and Andijan Regions) has been attracting attention for its silk textiles, embroidered textiles (suzani), pottery, and other crafts, and is recognized as a new potential destination for tourism, including shopping for these crafts, visiting sites where they are

produced, and experiencing the production of these crafts. Some tour companies in Uzbekistan are developing CBT tourism products, and it is possible to form a route from Tashkent to cities such as Kokand, Rishitan, Margilan, Antijan, and Namangan, and then back to Tashkent.

On the other hand, the southern cities of the Kyrgyz Republic, such as Osh and Jalal-Abad, are inhabited by many Uzbeks. Osh is home to the World Heritage site "Sulaiman-Thor Sacred Mountain" and is the center of tourism in the southern part of the Kyrgyz Republic. The tourist route connecting the Fergana Basin in Uzbekistan with Osh and Jalal-Abad in the Kyrgyz Republic is a route that allows visitors to enjoy the culture of the Fergana Basin of the Uzbeks and other people in both countries.



Source: Study team

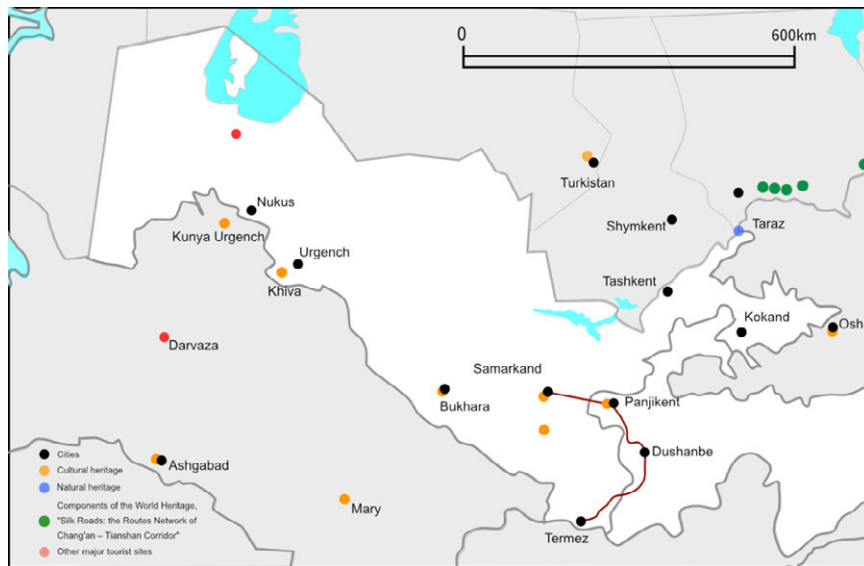
**Figure 3.3: Cultural tourism in the Fergana region of Uzbekistan and the Kyrgyz Republic.**

The Ministry of Foreign Affairs of Japan has issued a travel ban for the mountainous areas along the border with Tajikistan and Kyrgyzstan in Fergana, Namangan, and Andijan Regions, the border area between Uzbekistan and Tajikistan in Batken Region (including the enclaves between the two countries) and called off for non-essential travel the border areas with Uzbekistan in the Osh and Jalalabad regions. Therefore, it is difficult for Japanese tourists to visit but can be targeted by Western tourists and tourists from both countries.

### 3.3.4. Buddhist sites and Sogd culture in Uzbekistan and Tajikistan

The journey from Samarkand in Uzbekistan to Panjakent in Tajikistan is 60 kilometers and takes about one and a half hours. Panjakent has the ruins of Sogdiana, which was created by the Sogdians and flourished from the 5<sup>th</sup> to 8<sup>th</sup> centuries, and the ruins of Sarazm, a city from 4000 to 3000 BC, which is registered on the World Heritage list as the "Proto-urban Site of Sarazm." The southern part of Tajikistan is dotted with Buddhist sites. It is conceivable that a route could be formed to connect these cities and eventually reach the town of Termez in southern Uzbekistan (where Professor Emeritus Kato Kuzo of

Soka University and the National Museum of Ethnology has been excavating Buddhist ruins).



Source: JICA research team

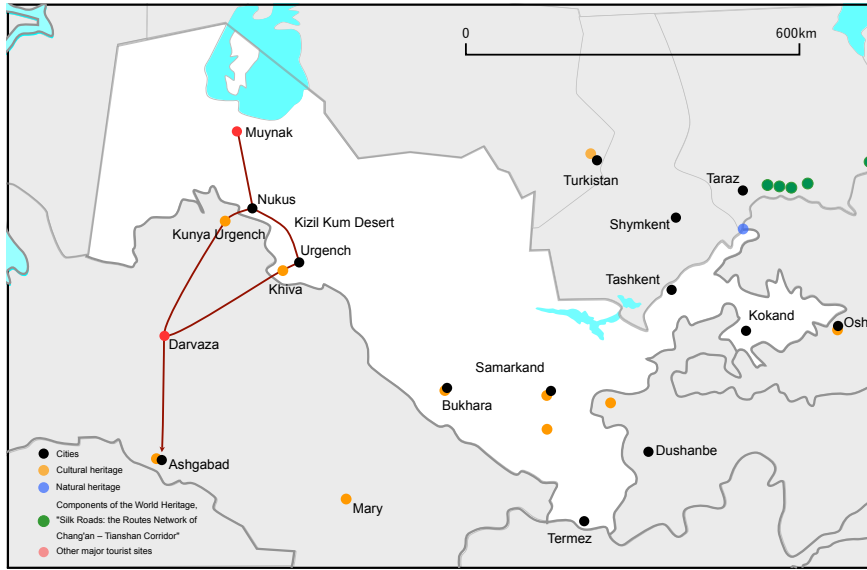
**Figure 3.4: Buddhist sites and Sogdian cultural tourism in Uzbekistan and Tajikistan**

Japan's Ministry of Foreign Affairs has called for the cessation of all unnecessary travel to areas near the border with Afghanistan where entry is restricted, and if the situation in Afghanistan is distressing, and even more severe danger alert may be issued. However, tourists from East Asian countries, Thailand, and other Buddhist countries, as well as tourists from Europe and the United States who are deeply interested in history, could be targets.

### 3.3.5. Old and new Urgench, Khiva, and Ashikabad

Urgench in Uzbekistan is a new city built in the 16<sup>th</sup> century, and the old Urgench is located in Turkmenistan as "Kufna Urgench." Kufna Urgench was built after the Islamification of the Khorezm area in the 11<sup>th</sup> century and became the capital of the Khorezm Shah dynasty and the center of the region in the 12<sup>th</sup> century. Later, as the Amu Darya River channel shifted, Kufna Urgench, which was further from the river channel, declined, and Khiva was built near the new Amu Darya River, followed by a new Urgench further north. In this sense, Kufna Urgench, Khiva, and Urgench can be said to be three sister cities.

Going south from Kufna-Urgench is Darvaza, a collapsed natural gas field, the "Gates of Hell," and further south leads to the capital, Ashkhabad. In order to enter Turkmenistan from Uzbekistan, the visa process is time-consuming, and transit visas, valid for a few days, are often obtained. For this reason, few tourists visit Ashkhabad at present, but if it becomes possible to visit Ashkhabad as tourism development in the five Central Asian countries progresses, it will become an attractive tourist route.



Source: Study team

**Figure 3.5: Old and new Urganj, Khiva, and Ashikabad**



## **4. Support for cooperation among local governments and universities and private sector activities**

Based on the results of interviews conducted in Japan, Uzbekistan, and the Kyrgyz Republic, this chapter summarizes the cooperation activities of local governments, universities, and activities of Japanese private companies in Central Asia, as well as items that provide hints for supporting these activities.

### **4.1. Cooperation of local governments**

In order to further promote cooperation between local governments in Japan and Central Asia, it is necessary to have the following perspectives.

#### **4.1.1. Need for coordinators to connect local governments**

In order to have a continuous and stable exchange with the partner city, it is important to have a coordinator who can facilitate the cooperation between both local governments. In terms of cooperation with Uzbekistan's local governments, the Embassy of the Republic of Uzbekistan in Japan has been actively coordinating and sharing information. In addition to the Embassy, Nagoya City and Maizuru City have established their networks, including the Friendship Association of Nagoya and Uzbekistan and Mr. Nazirov Ganicheru, the principal of Noriko Japanese Language School. In Maizuru City, a Coordinator for International Relation (CIR) was also assigned in addition to the local network. In the Kyrgyz Republic, Yamanashi City has an advisory contract with the Kyrgyz Republic Japan Center (KRJC), and Hamura City has the singer Ryo Mita (Hamura City - Kyrgyz Republic Friendship and Goodwill Volunteer Ambassador) as its coordinator.

#### **4.1.2. Secure budget and human resources for exchange**

In the exchange projects related to the host towns for the Tokyo Olympics and Paralympics, some governments used subsidies from the Cabinet Office. Nagoya City is considering using JICA's grassroots project scheme in the future, but when applying for the scheme, it is necessary to secure local partner companies and domestic collaborators. In many of the local governments interviewed this time, the International Exchange Division and the Tourism Division are in charge of exchange programs, while in smaller local governments, exchange programs are handled concurrently with other duties, and there are cases where there is a lack of human resources.

#### **4.1.3. Building the next level of cultural exchange and the mechanisms to support it**

In the interviews, Maizuru City can be cited as an example of one that has advanced from cultural exchange to the next level. The city has an agreement with the Rishitan of Fergana Region in Uzbekistan to cooperate in three areas: human resource development for nursing and welfare personnel, human resource development for industrial technology personnel, and tea cultivation. In addition to the city's

budget, the city is also trying to create a mechanism for the next level of exchange by raising funds through hometown tax payments.

#### 4.1.4. Possibilities for future municipal cooperation

The potential future activities of the local governments that collected the information can be summarized in Table 4.1.

**Table 4.1: Potential for future municipal cooperation**

Nagoya City - Tashkent City	<ul style="list-style-type: none"> <li>- The two parties plan to conduct a human resource exchange for high school students and are seeking collaboration between private companies.</li> <li>- Regarding the collaboration of private companies, Nagoya City is interested in utilizing JICA's grassroots project scheme. One of the issues is that, although there are potential companies on the Nagoya side, information on companies on the Uzbekistan side cannot be collected.</li> <li>- Tashkent City hopes to expand its partnership agreement with Nagoya not only to tourism and cultural exchange but also to the economic field.</li> <li>- Tashkent City is interested in (1) installing ICT equipment in museums to improve exhibits, obtain visitor data, and avoid visitor congestion; (2) improving the operation and maintenance of museums, parks, and other public facilities; (3) supporting archaeological research and conservation of archaeological sites and other sites, and in the field of architectural restoration; and (4) The roles of city office in attracting and constructing hotels and in improving hotel services.</li> </ul>
Nara City - Samarkand City	<ul style="list-style-type: none"> <li>- Future possibilities for exchange include cultural exchange through the dispatch of youth on both sides, exchange between universities, and exchange in specialized fields such as archaeology.</li> <li>- Nara City can disseminate information that the east end of the Silk Road is Nara's Shosoin Temple and expect to attract not only people from Samarkand but also all over the world who are interested in the Silk Road (and visit Nara in the future).</li> </ul>
Maizuru City - Rishitan Region of Fergana Region	<ul style="list-style-type: none"> <li>- The two sides have identified areas of cooperation in human resource development for care and welfare, industrial human resource development, and tea cultivation in Uzbekistan and are looking to deepen cooperation in these three areas.</li> <li>- Maizuru City is creating an environment for the acceptance and exchange of human resources in the post-COVID-19 period with on-hand and local resources, such as the application of scholarships, the use of hometown taxes, and the use of the local university.</li> </ul>
Yamanashi City - Kyrgyz Republic	<ul style="list-style-type: none"> <li>- Yamanashi City is waiting for the Kyrgyz side (the central government) to select a candidate for sister year; as of April 2021, the city was hoping to sign a sister city friendship agreement in the fall of 2021.</li> <li>- It is possible to consider visiting Yamanashi City when counterparts from the Department of Tourism and other organizations visit Japan for training in the " Master Plan Project for Regional Development and Tourism Promotion through the Utilization of World Heritage sites in Chui Region."</li> <li>- Yamanashi City is envisioning an exchange program for students. Possibilities include training in fruit tree cultivation and winemaking, taking advantage of Yamanashi City's wine production.</li> </ul>
Hamura City - Kyrgyz Republic	<ul style="list-style-type: none"> <li>- After the Tokyo Olympics and Paralympics, the team promoting exchange will be dissolved, and another department will take over the exchange program. It is necessary to confirm the exchange with the Kyrgyz Republic in the new department.</li> <li>- The mayoral election's outcome may affect the direction of the exchange.</li> <li>- If Hamura City will continue exchanges with the Kyrgyz Republic in the future, the Department of Tourism and other organizations visit Japan for training in the " Master Plan Project for Regional Development and Tourism Promotion through the Utilization of World Heritage sites in Chui Region."</li> </ul>

Source: Study Team

## 4.2. Cooperation of universities

Through interviews with the three universities of Tsukuba, Nagoya, and Wakayama, it became clear that each university has its exchange policy with Uzbekistan and the Central Asian Region. The

University of Tsukuba is engaged in humanities and social sciences, Nagoya University in law and Engineering, and Wakayama University in tourism and Japanese language education. In particular, Nagoya University is taking the lead in supporting inter-university collaboration between Uzbekistan and Japan.

All universities use their budgets for exchange programs, but the University of Tsukuba has also worked with the private sector to implement projects. Wakayama University showed an interest in JICA's grassroots project scheme. However, there are some issues to be addressed, mainly the lack of human resources regarding how to apply for the project and the various contract management tasks in implementing the project.

One possibility to strengthen cooperation among universities in the future from the perspective of tourism is to incorporate elements of tourism into the JICA Chair (JICA's project to support the establishment of Japanese studies courses). JICA Chair includes:

- Dispatch lecturers from Japan to give lectures on Japan's development experience, mainly in the fields of politics, economics, administration, and law and
- To support resources for education and research and human resource development to universities that wish to establish new Japanese studies courses or strengthen their existing education and research systems.

It may be possible to add courses in tourism (Japan's tourism system and characteristics of Japanese tourists).

In addition, the Silk Road International University of Tourism in Uzbekistan needs to dispatch experts from Japan in (1) hospitality business, (2) management of archaeological sites, (3) museum operation (including operation by the private sector), (4) marketing and promotion targeting the Japanese market, and (5) Japanese studies, including history, culture, economy, and language.

### **4.3. Support to private sector's activities**

Based on interviews with private companies operating in Central Asia, the following two points can be pointed out as key points for continuing business in the region.

#### **4.3.1. Need for a local contact person**

The private business companies interviewed have contact persons who understand the local context. Since business practices differ from those in Japan and follow-up is necessary, such personnel is essential.

#### **4.3.2. Understanding of business practices**

In Central Asia, business practices are different from those in Japan. It is necessary to understand local

conditions, such as local bazaar-like business practices and lack of inventory, or to consider local geographical and personal connections in some countries, as pointed out in the interview with Tokyo Rope.

In the future, it is desirable for Japanese companies interested in developing business in the region to be provided with local information by the local offices of JICA and Japan External Trade Organization (JETRO), which have local offices, as well as in-depth information through their networks with local companies.

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## Conclusions and recommendations

### Part 1

In Part 1 of this report, the study team analyzed information on the tourism sector in the Central Asian countries. Focusing on Uzbekistan and Kyrgyz Republic, where the study team visited, the results can be summarized as follows.

#### Tourism development policies and institutions

Uzbekistan has been actively reforming its tourism policy since 2016 to accommodate international tourists and promote domestic tourism, and in 2019 enacted and implemented a new tourism law. Especially, the exemption of visitor visas for tourism purposes, contributed significantly to the increase in international visitors in 2018 and 2019.

The Kyrgyz Republic, Kazakhstan, and Tajikistan are also gradually reforming their tourism administration, but in the Kyrgyz Republic, the lack of human resources and budget for the Department of Tourism that controls tourism administration is a challenge.

#### Tourist market

Uzbekistan, the Kyrgyz Republic, Kazakhstan, and Tajikistan have all seen significant increases in international visitor arrivals since 2016, especially in 2018 and 2019. However, in all these countries, more than 90% of the international visitors are from within Central Asia and the Russian Federation, and the number of "international tourists" with overnight stays is limited. Uzbekistan had about 6.7 million international visitors in 2019, but only about 1 million people came for "tourism". In the same year, the Kyrgyz Republic had 8.5 million international visitors, but the number of tourists with overnight stays was at the level of 300,000 to 400,000. As it relates to the tourism economy, when setting targets for the tourism development plan, it is necessary to set the goal of increasing the number of tourists with overnight stays from the perspective of increasing the amount of tourism receipts.

#### Tourism economy

According to the Economic Impact Report compiled annually by the World Travel & Tourism Council (WTTC), the tourism industry in Uzbekistan, the Kyrgyz Republic, Kazakhstan and Tajikistan has been significantly affected by COVID-19. In comparison, the amount of international tourism revenue between 2019 and 2020 has dropped by one-third to one-fifth. On the other hand, the decline in the receipts from domestic tourists over the same period is about half, suggesting that domestic tourism is underpinning the tourism sector in both countries.

In addition, the 2019 edition of the Travel and Tourism Competitive Index (TTCI), produced every two years by the World Economic Forum (WEF), ranks Kazakhstan 80<sup>th</sup>, Tajikistan 104<sup>th</sup>, and the Kyrgyz Republic 110<sup>th</sup> out of 140 countries. All these countries have low ratings in areas such as policy priorities

for the tourism sector, openness, environmental sustainability, and transportation infrastructure, which require further improvement. Uzbekistan and Turkmenistan do not participate in the TTCI, but they should definitely join the TTCI efforts, as not participating in the TTCI itself will lead to a negative image among the world's tourism operators.

#### Tourism resources and tourism products

Central Asia has many World Heritage sites and the World Heritage Tentative List sites that cross national borders, and intangible cultural heritage. In addition, there are many resources located at the borders of each country in terms of the distribution of historical and cultural resources and natural resources, and it is possible to aim to form tourism routes with neighboring countries.

In Uzbekistan, the efforts of the private sector have led to the development of historical and cultural tourism with the formation of the "Golden Route" along the World Heritage Cities of Samarkand, Bukhara and Khiva. The country's public and private sectors have both recognized the need to diversify tourism products in response to congestion of tourist sites in 2018 and 2019 and the drop in tourism industry due to the global spread of COVID-19 after 2020.

In the Kyrgyz Republic, the main tourism products are mountaineering, trekking, hiking, and staying at resorts on the northern shore of Lake Issyk Kul. Recently, however, there has been a movement to make nomadic culture a new element of tourism, and events are being held at Yurta camps, exhibitions of falconry and equestrian games, and horse riding. The development of winter tourism products, such as skiing, is also underway.

#### Tourist facilities

Uzbekistan experienced a shortage of accommodation due to a surge in tourist arrivals in 2018 and 2019. To cope with this, the government of Uzbekistan plans to increase the number of hotel rooms from 20,000 in 2018 to 64,000 in 2025, and has developed a generous system for hotel construction, including tax exemptions and subsidies for the construction of hotels with three stars or higher and payments to international hotel chains. As a result, the tourist cities such as Tashkent and Samarkand have been able to increase the number of hotels built. As a result, hotel construction is progressing in tourist cities such as Tashkent and Samarkand even under the COVID-19 pandemic.

In the Kyrgyz Republic, there is a cluster of accommodation facilities on the northern shore of Issyk-Kul Lake, where tourists from neighboring countries and Russia are staying for a long time. On the other hand, Yurta camps are beginning to be established in the alpine tourist areas such as the southern shore of Issyk-Kul Lake and Lake Song Kul. One of the future challenges for the development of tourism facilities in the Kyrgyz Republic is to preserve the natural environment of the tourist sites and lakes, etc. by conducting proper sewage treatment and waste disposal.

### Tourism Infrastructure

The number of air and high-speed rail services connecting cities within Uzbekistan is low compared to passenger demand, and tour companies struggled to secure transportation of air and high-speed rail for their customers in 2018 and 2019. In 2020 and 2021, the supply and demand for air and high-speed rail calmed down due to the spread of COVID-19. However, there are concerns that demand for air and high-speed rail will return to outstrip supply after the pandemic ends. In the case of high-speed rail, it has been pointed out that the number of train services may need to be doubled from the current level (three round trips per day between Tashkent and Samarkand). Other necessary actions are development of parking lots at tourist sites, and the construction of restrooms and rest areas for people traveling by car or bus for long periods of time.

In the interviews with the tourism sector people in the Kyrgyz Republic, they expressed their expectation for disaster prevention measures against landslides and falling rocks on roads, installation of road signs around tourist spots, and improvement of bicycle lanes, but their evaluation of the transportation infrastructure in Kyrgyzstan was generally high. On the other hand, the public and private sectors are highly aware of the problems of sewage treatment and waste disposal and expressed a strong desire to work in this area.

### Marketing and promotion

In Uzbekistan, the Marketing Department of MOTAS responsible for marketing the country to attract international tourists and planning the promotion of Uzbekistan's tourism abroad, while the National PR Center under the MOTAS is responsible for the implementation of the promotion. All activities, including website, social media, printed materials, FAM tours and media tours, participation in travel expositions, are carried out by the National PR Center and not outsourced to private PR companies that know the markets of the target countries.

In the Kyrgyz Republic, the Department of Tourism is responsible for all the planning and implementation of tourism marketing and promotion. However, with only nine staff members in the Department of and a limited budget for promotion, it is difficult to say that sufficient marketing and promotion activities are being carried out.

In both Uzbekistan and the Kyrgyz Republic, the private sector is also conducting its own marketing and promotion activities. In the interviews with the private sector during the study members visited Uzbekistan and Kyrgyzstan, the private sector in both countries voiced the opinion that the government and the private sector should cooperate in tourism marketing and promotion. There was also a suggestion that both countries have multiple national tourism slogans and that they should be unified.

### Tourism services and human resource development

As explained in the section on tourism facilities, Uzbekistan plans to increase the number of hotel rooms

from 20,000 in 2018 to 64,000 by 2025, and is developing and operating various incentives to encourage private investment. However, the government has not yet taken actions to train human resources to work in these accommodations. The number of graduates from universities with tourism-related departments was around 180 in the average of 2018/19 and 2019/20, while the number of graduates from colleges that offer practical tourist services averaged only 1,400 in 2018/19 and 2019/20. The government of Uzbekistan is trying to develop human resources with a good balance between theory and practice, rather than the traditional theoretical education, by establishing the Silk Road International Tourism University and attracting private universities with tourism courses abroad, but the creation of curricula and securing faculty members are issues that need to be addressed.

The Kyrgyz Republic faces more challenges in terms of human resource development for tourism than Uzbekistan. The country has not made progress in developing educational facilities or attracting foreign universities like Uzbekistan, and it faces challenges in both hardware and software.

In both Uzbekistan and the Kyrgyz Republic, association organizations such as tourist operators' association, guide association, hotel association, and CBT association have been playing a certain role in human resource development and setting standards for tourism services. In the future, the government and the private sector are expected to further cooperate in setting standards for tourism services and human resource development.

#### Impact of COVID-19 and countermeasures

Uzbekistan has been promoting domestic tourism since 2018, encouraging domestic tourism by youth, women, business, and other groups, and establishing holidays to make it easier to take consecutive holidays. Large tour companies with affiliates such as accommodation and transportation companies were able to compensate for the decline in international tourists to some extent by attracting domestic tourists. However, some small and medium-sized travel agencies that catered to the niche demand of international tourists gave up on continuing their business.

In the Kyrgyz Republic, as in Uzbekistan, there was a shift from international tourists to domestic tourists. As a result, tour companies that have diversified into accommodation and transportation services have been able to maintain their business operations due to the expansion of the domestic tourism market, but small and medium-sized tour companies that have not diversified their business operations have fallen on hard times.

#### Analysis of case studies of regional cooperation organizations and DMOs in Japan

Based on the analysis of the case studies of organizations for regional tourism development and promotion in the world and DMOs in Japan, the following four points can be considered as lessons for the regional tourism development in the five Central Asian countries. The first point is that in order for tourism development cooperation at the regional level to be sustainable, the region needs to have some



cohesion. The second point is the challenges of funding for the activities of regional tourism development organizations. The third point is that the organization should involve not only government officials but also people from the private sector in its membership, board of directors, and secretariat, and use the ideas of the private sector to diversify its activities and provide services that meet the needs of the private sector, as well as to collect membership fees from private members and to secure new sources of revenue. The fourth point is not to create an organization called the Regional Tourism Organization from the beginning, but to create a task force-like organization depending on the project or action, where representatives from the public and private sectors of the member countries can be members.

## **Part 2**

In Part 2 of this report, the possibility of regional tourism development and promotion in Central Asia and draft tourism development strategies were examined for three countries, namely Uzbekistan, the Kyrgyz Republic and Kazakhstan. The followings are results of the examination.

### Central Asia

Activities for the development and promotion of tourism in the Central Asia region are justified, given the following circumstances: (1) the history of intermingling of Turkic and Persian peoples since the era without national borders and the subsequent development of grouping during the Soviet era, (2) the existence of cross-national tourism resources such as Silk Road heritage sites, Islamic architecture and art, Buddhist heritage sites, and natural resources, (3) complementary nature of tourism resources: historical and cultural resources of Uzbekistan, Turkmenistan, and Tajikistan, and natural resources of Kyrgyz Republic and Kazakhstan, (4) voices of the public and private sectors in Uzbekistan and the Kyrgyz Republic about the necessity of joint tourism promotion by the five countries and the formation of multi-country tourism routes; and (5) The promotion of the Silk Road visa the Silk Road World Heritage support project, and the dispatch of advisors to the Central Asian tourism region under the framework of "Central Asia plus Japan."

The proposed strategies for regional tourism development in Central Asia can be organized from the perspective of the modern destination management (tourism resources, tourism demand, and tourism supply) and tourism digitalization as follows.

- Tourism resource: exchange of cultural heritage conservation and research; cooperation in environmental conservation and protection of flora and fauna in national parks and nature reserves; promotion of cultural exchange among countries,
- Tourism demand: Marketing and promotion of the "Central Asia" destination to the global market, and
- Tourism supply: Cooperation in tourism human resource development, improvement of tourism

services (participation in WEF's TTCI), creation of a mechanism for regional tourism cooperation with Uzbekistan's MOTAS at the core.

- Digitalization of tourism: Unification of the format and design of tourist information in each country, provision of information on congestion at tourist sites and guidance and management of parking lots, use of augmented reality (AR) and virtual reality (VR) to promote tourism and interpret historical heritage, and implementation of a regional-level contest to promote digitalization of tourism.

### Uzbekistan

Uzbekistan has been affected by the global spread of COVID-19 in 2020, when the tourism industry was about to receive a huge boost and further development due to the development of historical and cultural products by the private sector and tourism sector reforms by the government since 2016. The direction of Uzbekistan's tourism development after the pandemic is to (1) diversify tourism, which has been developed mainly through historical and cultural tourism and golden routes, (2) address the shortage of transportation infrastructure and accommodation facilities experienced in 2018 and 2019, and (3) develop tourism human resources, which will be in short supply in the future tourism development. The proposed tourism development strategy based on these perspectives is shown below.

- Tourism administration: strengthening capacity for information analysis and planning, and coordination with neighboring countries and the private sector,
- Tourism product development: establishment of a mechanism for coordination and collaboration between the public and private sectors for the development of new tourism activities, and the development of new tourist sites and facilities, and
- Development of human resources for tourism: human resource development for accommodations and guides.

### Kyrgyz Republic

The typical tourism products in the Kyrgyz Republic have been natural resource tourism represented by mountain climbing and trekking, and CBT utilizing natural resources. On the other hand, the momentum to utilize nomadic culture and historical and cultural resources for tourism is also growing.

In the Kyrgyz Republic, organizations in charge of tourism at the national and regional levels are lacking in both human resources and funds, but the private sector, especially in Bishkek and Osh, is growing. In addition, CBT is the most active among the five Central Asian countries, and OVOP project has led to active production in rural areas using local resources. It is desirable to develop tourism in a way that the private sector can support the government sector, which tends to lack human and financial resources. The proposed tourism development strategy from this perspective is shown below.

- Tourism administration: cooperation with the private sector to overcome limited human and

financial resources,

- Marketing and promotion: focusing on nature tourism and nomadic culture,
- Tourism product development: development of historical and cultural resources and consideration for the environment in tourism development, and
- Human resource development for tourism: cooperation with the private sector and the use of digital technology in human resource development

### Kazakhstan

Although it was not possible to visit Kazakhstan in this study, analysis of the collected information suggests that international tourists, excluding from neighboring countries and Russia, are those accompanying business, and that most international tourists stay in only two cities, Almaty and Nur-Sultan. In order to increase the number of international tourists who enjoy the country's natural, historical and cultural resources, and also increase the number of overnight stays in places other than Almaty and Nur-Sultan, the following efforts will be necessary.

- Tourism product development: development of natural and historical & cultural resources, and
- Tourism administration: review of tourism-related organizations of the central government and activation of local governments in tourism development and promotion.

In addition, this study team collected information on collaboration between local governments, universities, and the private sector in Japan and Central Asia, and summarized the situation of activities of these organizations and items that can provide hints for their future support.

### Cooperation of local governments

- In order to have a continuous and stable exchange with the partner city, it is important to have coordinators who can facilitate the cooperation between both local governments.
- It is important to secure budget and human resources for exchange, and there is a need for support in these areas.
- Some local governments are working on the next level of cultural exchange, while at the same time building a system to support it.

### Cooperation of universities

- Consider incorporating elements of tourism (Japan's tourism system, characteristics of Japanese tourists) into the JICA Chair (JICA's support scheme to establish a study course about Japan).
- The Silk Road International University of Tourism in Uzbekistan has requested the dispatch of experts from Japan (in five majors).

### Collaboration of private sector

- It is important to have a local contact person in Central Asia.

- It is necessary to promote understanding of the differences in business practices, such as consideration for geographical ties and personal connections, and the different ways of thinking in business such as holding inventory.