

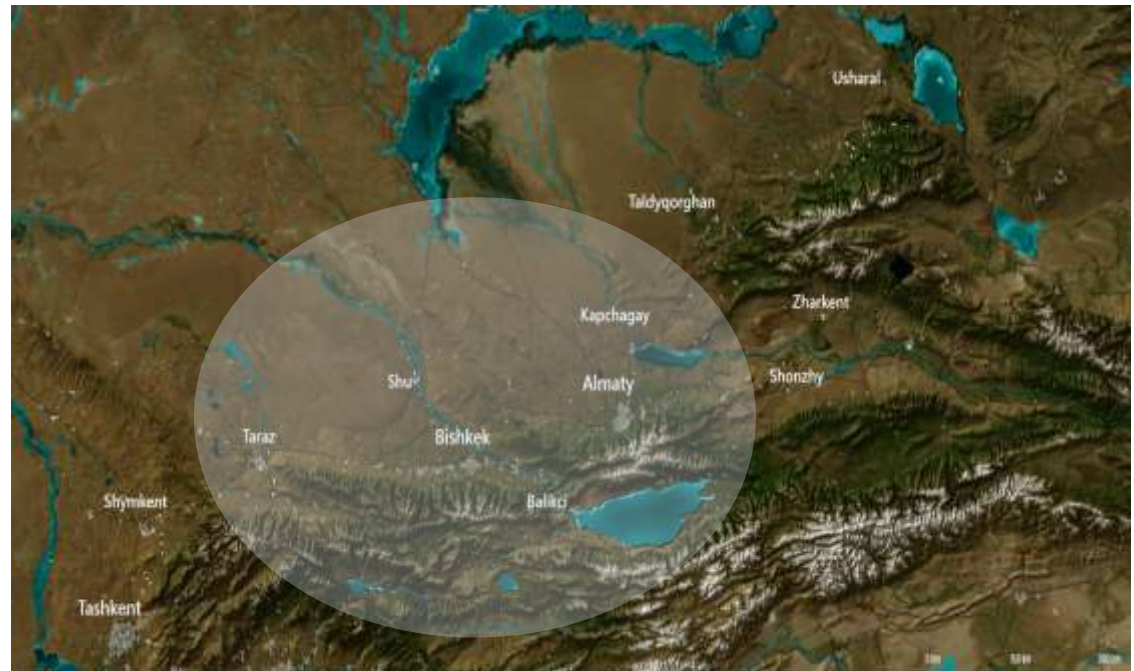


## Almaty–Bishkek Economic Corridor (ABEC) Joint Tourism Proposal

Tashkent, 23-24 October 2018

# Almaty- Bishkek Economic Corridor

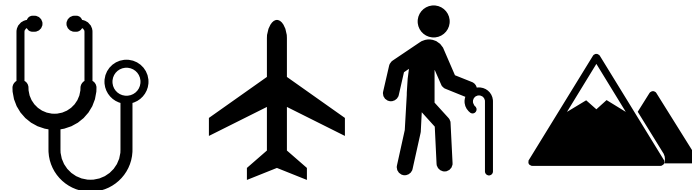
- The **vision** for the economic corridor is that the two cities can achieve far more together than either can achieve alone
- ABEC aims to
  - reduce travel times;
  - create one competitive market for tourism, health, and education services; and
  - aggregate agricultural produce in modern wholesale markets to exploit the sector's export potential
- Act local and think global



# Almaty- Bishkek Economic Corridor



- Almaty-Issyk-Kul alternative road
- Border Crossing Point modernization
- Medical/Health tourism
- Common Branding/Products



# ABEC Tourism Potential



ABEC is among the top 10 growth destinations in tourism worldwide in 2017 (WTTC)



The Kyrgyz Republic is globally ranking first in growth of tourism's contribution to GDP



Tourism suited for job-rich and inclusive socioeconomic growth of ABEC

# ABEC Tourism Potential

- ABEC Mountain Cluster has similar characteristics as famous Tyrol region in Austria/Italy
- Challenge: seasonality
- Mountain region with winter tourism focus but now more summer tourists



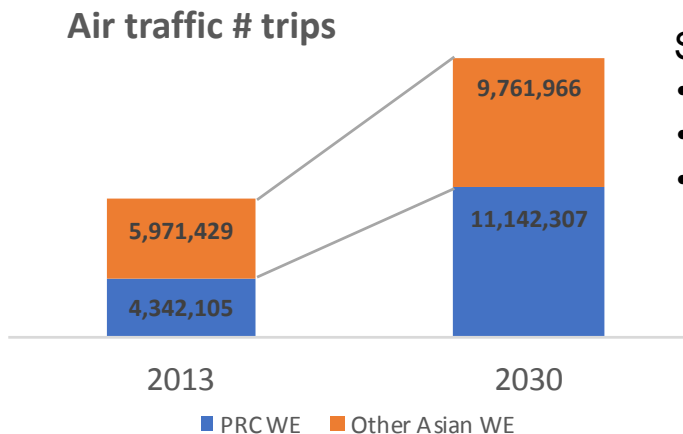


- ABEC's potential as Air Transit Hub has a proven track record



# ABEC Aviation Potential

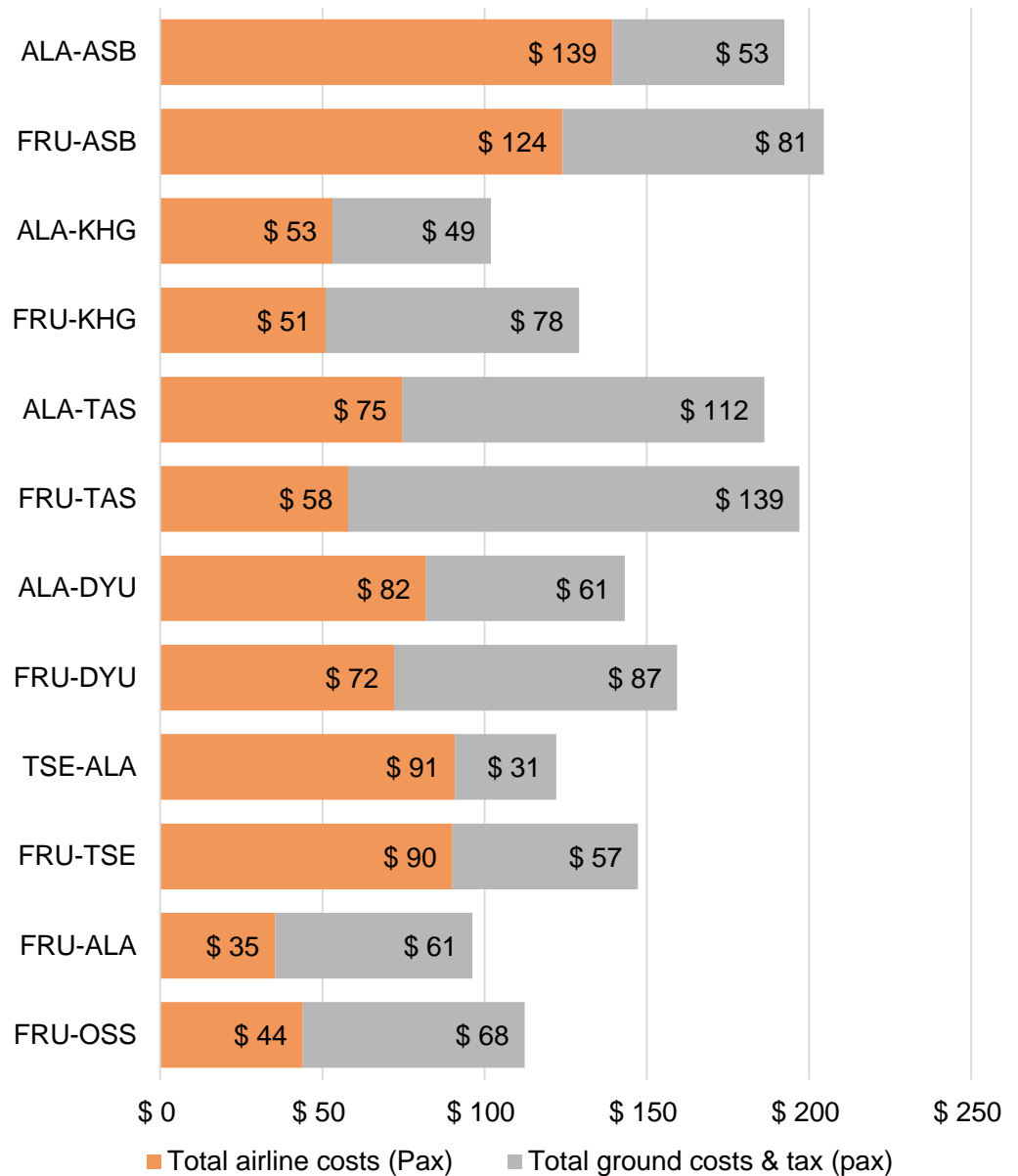
- ABEC has the highest spending passenger potential and highest growing compared to its peers (OXB/IST).
- Recommendations:
  - Improve coordination :
    - Specialize each airport in different market segments (ex. LCC in FRU, FSC in ALA)
    - Rapid, transfer & border crossing time between: FRU – ALM; Airports – both city centers
  - Liberalize BASA (Bilateral Aviation Services Agreements)
  - Improve Regulation, Air Navigation, airport infrastructure & accessibility.
  - Improve airline's competitiveness and complementarity of approaches



Similar business models :

- Iceland airport: 8.7 million
- Dubai airport: 15.8 million
- Abu Dhabi: 4.8 million

# ABEC Aviation Potential





# ABEC Aviation Potential

**Major problems of :**

- **Market distortion by unfair competition;**
- **Inconsistent policies**
- **Excessive high ground costs**

**High prices**

**Low traffic levels**

**Fewer tourists**

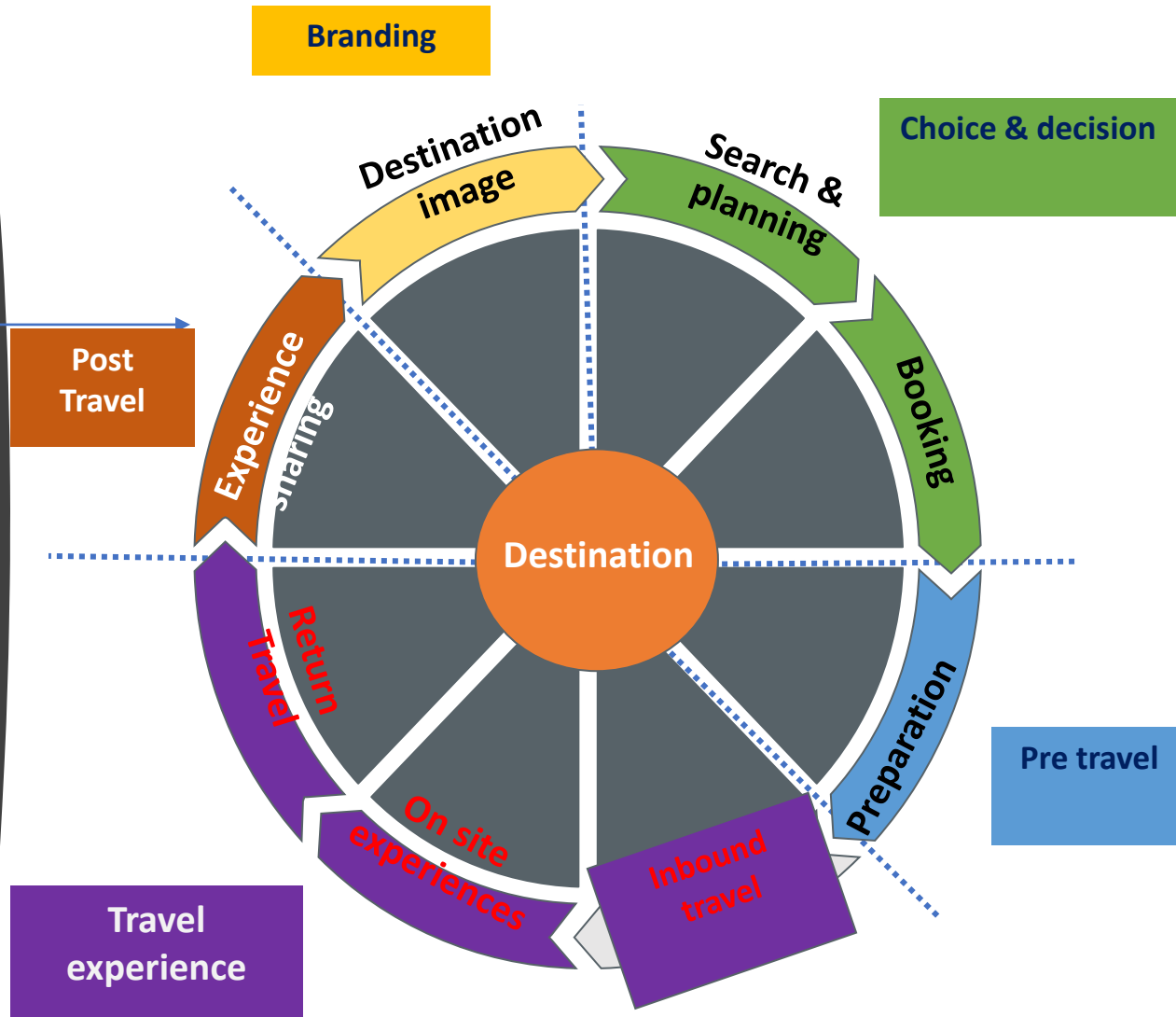
# ABEC Tourism Master Plan Approach

**Hard  
& soft  
infrastructure,  
Destination  
Management,**

**Institutional capacity &  
Policy Instruments**

**Legal framework & Institutional  
empowerment**

# ABEC Tourism Master Plan Approach



# ABEC Tourism Master Plan Proposal

**Strategic  
analysis and  
planning**

**KAZ+KGZ  
Common  
Strategic  
Analysis and  
Planning**

**KAZ and KGZ  
Respective  
National Tourism  
Plan**

**Institutions**

**Best practice  
competencies,  
responsibilities and  
legal delegated  
powers**

**Development of key  
management  
instruments in KAZ  
and KGZ**

**Master Planning**

**Social and environmental  
safeguards**

**Tourism land spatial  
planning in KG and KAZ**

**Hard Infrastructure (roads, last  
mile access, utilities) planning  
and pre-feasibility**

**Soft infrastructure (skills  
development, infrastructure,  
promotion & marketing)  
planning and pre-feasibility**

# ABEC Tourism

- Destination joint concept
- Maximization of joint asset potential and tourism flows
- Increased content ->  
Increased average stay ->  
increased spending

