



# **CAREC TOURISM SECTOR PROGRESS REPORT AND WORK PLAN**

**JUL 2022 - APRIL 2023**

Reference Document  
Senior Officials' Meeting  
Central Asia Regional Economic Cooperation  
12-13 June 2023

## ABBREVIATIONS

ABEC	Almaty – Bishkek Economic Corridor
ADB	Asian Development Bank
CAREC	Central Asia Regional Economic Cooperation
CTCO	CAREC Tourism Coordinating Office
CTS	CAREC Tourism Strategy
KNSC	Kyrgyz National Statistics Committee
MC	Ministerial Conference
NTO	National Tourism Organizations
PRC	People’s Republic of China
TA	Technical Assistance
TFPG	Tourism Focal Points Group
TTDI	Travel and Tourism Development Index
UNWTO	United Nations World Tourism Organization
WEF	World Economic Forum

## **TABLE OF CONTENTS**

<b>I. KEY DEVELOPMENTS AND RESULTS .....</b>	<b>4</b>
<b>II. CHALLENGES AND KEY ISSUES .....</b>	<b>12</b>
<b>III. WORK PROGRAM FOR JULY 2022–JUNE 2024 .....</b>	<b>12</b>
<b>IV. DELIVERABLES FOR 2023 MINISTERIAL CONFERENCE .....</b>	<b>13</b>

## I. KEY DEVELOPMENTS AND RESULTS

1. The CAREC Tourism Strategy 2030 and its accompanying regional tourism investment framework 2021–2025 were endorsed at the 19th CAREC Ministerial Conference (MC) on 7 December 2020. In the 2<sup>nd</sup> half of 2021, a strong effort was made to approve the concept approval of the CAREC Tourism Virtual Portal, the provision of content by the countries, and the report on Tourism Infrastructure, services, and prioritization. Since early 2022, the TA 9776-REG: Sustainable Tourism Development in the Central Asia Regional Economic Cooperation has successfully evolved to secure additional funding, and expended the scope of activities. Currently, the TA is entering its second phase, requiring decisions from the Senior Official's Meeting, and consensus around the issues of governance and sustainability of the CAREC Tourism.

2. **The Global Travel and tourism industry** was reshaped with medium to long-term implications due to some **critical factors** that took place in the second half of 2021 and during 2022, most of them simultaneously with different time horizons and climate change issues:

- Phasing out of the covid pandemic in most developed countries in the second half of 2021
- The Russian Invasion of Ukraine
- The zero covid policy in PRC and its opening up since early 2023
- The emergence of latent geopolitical clashes, de-globalization, and disruption of supply chains
- Climate change impacts and Risks for Tourism

3. **Phasing out of the covid pandemic.** The covid pandemic entered a controlled momentum where the healthcare systems could again cope with outbreaks of infections after mass vaccinations in the most developed countries. The travel restrictions were abandoned by the end of 2021 and the first quarter of 2022. Travel was resumed in an environment of enormous demand, with high occupancy rates in most consolidated tourist destinations. However, the combination of high demand, with increases in fuel prices in 2021-2022, and reductions in airline capacity supply have caused massive increases in air and land road transport prices.

4. **Russian invasion of Ukraine.** Considering the economic structure of Russia and Ukraine, the immediate consequences of the war were severe imbalances in the agricultural and energy supply chains: Russia and Ukraine are leading global suppliers of farm products, Russia and Belarus in fertilizers, and Russia in oil and gas. In tandem with no oil production increase by major international producers, the weaponization of these commodities has resulted in massive price hikes. The result was a rapid inflation increase resulting in increased interest rates. Furthermore, western financial and economic support to Ukraine in its war efforts has resulted in a significant rise in public spending in the short and long term, right after the unprecedented public expenditure to mitigate the covid pandemic effects.

5. **The zero covid policy in PRC.** The US and Europe marshalled scientific capacities to produce highly effective vaccines allowing the world to transition to endemic Covid<sup>1</sup>. In almost every country except PRC, people were increasingly leading relatively normal lives. PRC's vaunted biotechnology industry failed to produce an effective vaccine, whilst non-Chinese

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<sup>1</sup> Financial Times, 07.09.2022, by Ezekiel Emanuel

vaccines and therapeutics were not allowed to enter the home market. The zero-Covid policy imposed costs that went well beyond public health. IMF and World Bank estimated that strict Covid restrictions would likely shave a full point off PRC's 2022 growth target. And with the country accounting for a full fifth of global growth, a slump there would heap significant economic pain on the rest of the world, which, linked to an inward turn, amplified the effects<sup>2</sup>. Foreign investors are diverting manufacturing and redesigning the supply chains reducing PRC's dependencies. Tourism was focused within PRC in a limited manner, whilst Chinese inbound and outbound tourism suffered dramatically. The PRC opening-up in early 2023 resulted in rapid business travel growth to/ from PRC, with flights resuming. For the second half of 2023, the rapid growth of Chinese leisure tourists is expected to mainly be geared to the Pacific area and less to South and Central Asia or European destinations<sup>3</sup>.

**6. The emergence of latent geopolitical clashes, de-globalization, and disruption of supply chains.** Geopolitically, PRC's turn inward means it will endeavour to showcase its accomplishments and belittle the west, and rising tensions over Taiwan, multiple tiny islands claimed by Japan, Taiwan and PRC, and other fault lines<sup>4</sup>. Regionally around the globe, there is an increasing divide between democracies and autocracies, as well as regional reconfigurations of power<sup>5</sup>. Such divide and regional power re-configurations will lead to conflictuality among nations and blocks<sup>6</sup>. The expected results are associated with; weaponization of value chains; constraints to international commerce; profound disruptions related to transport; logistics and transport infrastructure and equipment; generalized price increases of manufactured goods; restrictions on foreign investment and capital flows; and restrictions on migration flows.

**7. Climate change impacts and Risks for Tourism.** Climate change poses significant threats to the tourism sector, such as extreme weather events, deadly storms, wildfires, sea-level rise, temperature changes, dry gorges, rivers and canals, and potential conflicts over natural resources, particularly fresh water. No country is immune to climate change. The attractiveness of many tourist destinations depends on their climate; however, tourism is among the first sectors affected by climate change, but tourist activity, at the same time, is a significant source of greenhouse gas emissions. Research can contribute to the transition of the tourism sector toward greater sustainability<sup>7</sup>. To mitigate the impacts of climate change, countries need to address this as a cross-cutting issue to develop adaptation and resilience of destinations, to develop new tourism practices and mindsets, and to develop institutional and territorial responses in tourist areas.

**8. Impacts and trends in the travel and tourism Industry.** Tourism is expected to respond to the critical factors described above with emerging trends, which countries need to be aware of to produce effective responses that benefit their industries:

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<sup>2</sup> Idem 1

<sup>3</sup> Conferences in ITB Berlin, March 6-9, 2023

<sup>4</sup> Idem 1

<sup>5</sup> Power perceived by regional influence upon neighboring states: Brazil in South America, Saudi-Arabia in the Middle East, PRC in Asia and the Pacific

<sup>6</sup> Source: JCF Strategy Consulting report on "Geopolitics, conflictuality, value chain disruptions, de-globalization, and the emergence of a new social-economic trend of meta regionalism," May 2016.

<sup>7</sup> Thoros "Revue en Recherche du Tourisme," April 3, 2023

- **Inward turn.** Following the pandemic, most countries discovered the need to welcome domestic tourism and foreigners with longer periods of stay<sup>8</sup>. Regional tourism has become highly important due to lower travel costs.
- **Higher costs of travel.** Airfares have increased significantly due to reductions in capacity and higher jet fuel prices. This results in higher airfares with impacts on the volume of travellers. Furthermore, all other travel-related costs are expected to increase.
- **Reduced income and expenditure from traditional issuing countries.** The rise in cost of living and of interest rates have important impacts on the disposable incomes of the major and traditional issuing countries, as well as developing countries.
- **Competition between destinations** tends to become more centred around: safety and security issues; total cost of the trip; diversity and attractiveness of the available attractions meeting the expected experiences; welcomeness and openness of the local communities; quality of service.
- **Increased consciousness of environmental sustainability and resilience** puts pressure on destinations and countries to **actually reduce** their Green House Gas emissions already in the short-term rather than reduce their pace of growth in the long-term. Tourism environmental activism is expected to grow<sup>9</sup>, particularly by the younger and well-educated generations, in avoiding destinations that need to improve their environmental sustainability performances.

9. **Perceived social value.** Brand image and brand value of a destination are highly related to the perceptions in the digital space and the importance of the social networks<sup>10</sup> of the individual. Tourism marketing has become fundamentally digital, and traditional printed media and influencers have become mostly digital.

## A. CAREC Tourism Virtual Portal

10. The CAREC tourism virtual portal – one of the initiatives under the marketing and branding strategic pillar of the tourism strategy 2030 – is expected to be launched during the CAREC Ministerial Meeting to be held in November 2023 in Tbilisi, Georgia.

11. During the 2<sup>nd</sup> half of 2021, the countries have provided the requested content by the TA 9776-REG team. Unfortunately, there were some inconsistency and quality discrepancy of the content provided by the countries, preventing the launching of the portal in June during the Senior Officials' Meeting with a minimum quality level. . As a result, we propose to submit and endorse

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<sup>8</sup> The denominated digital nomads, for whom some countries (e.g. Spain) have started to regulate, that are not considered as tourists according to the UNWTO definition. This type of nomadism can also be related to higher income non-asylum seekers, who develop their professional activities based in different countries, either because of wars or simply because of personal preferences.

<sup>9</sup> A review of tourism and climate change mitigation: The scales, scopes, stakeholders, and strategies of carbon management, Stefan Gössling a e, Martin Balas b, Marius Mayer c f, Ya-Yen Sun d, Elsevier, Tourism Management Volume 95, April 2023.

<sup>10</sup> Social value derives from the social media and networking experiences and the perceived value added within such communities when visiting certain destinations, vis-à-vis other.

professional content production of each CAREC country, the regions within each country, and each country's top 10 tourist attractions by mid of August 2023, aiming to provide a consistent image and appealing content for the portal launch during the CAREC MC, including a style guide for the "Visit Silk Road" common brand.

12. If the portal launch can be made with the content envisaged in the submitted plan in time for the CAREC Ministerial Meeting to be held in November 2023 in Tbilisi, Georgia, taking in consideration that the countries have to approve the content through a no objection formal letter, then it can be done successfully. If the described minimum level of quality content cannot be ready in time for the event, then the risks on not achieving the TA's output will be high. Under such a circumstance, the launch should be only done when the minimum content has been produced and approved by the countries.

13. The CAREC tourism portal will target two different audiences: institutional and travelers. The institutional part will link regional partners and promote information sharing, including tourism projects and investment-related information, tourism data and statistics, events, and educational and training resources. The sections of the portal targeting potential and actual travelers will focus on providing information about the countries, regions, and tourism attractions, whilst promoting the services of private sector tourism providers in the region, thus constituting a true B2B portal capable of supporting the private sector in generating business and attracting tourists in a cost-effective manner. Furthermore, the portal will promote the common brand and generate traffic that can flow to support each country's national institutional web portals or improve visibility of the portal.

14. The CAREC Tourism Portal has the potential to strengthen the "Visit Silk Road" common brand shared by CAREC countries as an umbrella of the national tourism brands, as well as to generate substantial revenue-generating initiatives, which can provide financial and managerial sustainability not only the portal but also the entire CAREC tourism endeavors if the member countries choose accordingly.

## **B. Tourism Infrastructure, Services, and Prioritization. Second phase of the TA 9776-REG**

15. The "Assessment of Tourism Infrastructure, Services, and Project Prioritization" report, a component of the TA 9776-REG, was approved at the end of 2022 upon due provision of the comments of relevant stakeholders between August 2021 and the end of October 2022. The approval of this report was essential to enter the second and final phase of the TA 9776-REG, consisting of conceptualizing four projects included in the regional tourism investment framework 2021–2025. Project concepts will include the project's description, rationale, and scope; initial financial and economic pre-feasibility; initial social and environmental impact assessment; and identification of implementation agencies, timeline, and potential financing options.

16. 4 Projects have been identified for conceptualization to include: the project's description, rationale, and scope; initial financial and economic pre-feasibility; initial social and environmental impact assessment; and identification of implementation agencies, timeline, and potential financing options. These projects are:

- a. Improvement of the infrastructure and services, including water supply and sanitation, sewage, and solid waste management, environmentally sustainable concepts,

including building units based on renewable energy sources in pilot areas and a network of public eco-toilets in remote areas suitable to demanding visitors.

- b. Upgrading and rehabilitating historical and culturally relevant tourist attractions in integration with urban planning and development, Institutional improvements, improved access to disabled, and capacity-building programs for stakeholders in major historical cities
- c. Development of a common registry of tourism assets and data collection, their content, and their management to allow effective and cost-efficient use by public entities, government officials, travelers, guides, and tour operators for intelligence gathering.
- d. Branding, strategy, planning, budgeting, and funding sources for implementing the common brand “Visit Silk Road,” integrating additional features for the CAREC tourism portal, and developing a “CAREC tourism service quality label innovative system.”

17. During the CAREC Senior Officials’ Meeting to be held on 13-14 June in Tbilisi, Georgia, the geographical scope of each of the first two projects needs to be determined, as well as the country(ies) to run a pilot on a “CAREC tourism service quality label innovative system”.

### **C. Governance of CAREC Tourism**

18. The CAREC Tourism Strategy 2030 provides a framework for the Institutional Structure of CAREC Tourism. At the top, the CAREC Ministerial Conference functions as the main high-level policy and decision-making body, responsible for providing strategic guidance on issues of regional relevance and accountable for the overall results of the CAREC Program. The Senior Officials’ Meeting monitors progress, recommends operational improvements, and ensures that the high-level decisions made at the CAREC Ministerial Conferences are effectively implemented. A Tourism Focal Points Group (TFPG) at the Tourism Sector level will lead the overall CAREC tourism work. This group comprises the tourism focal points appointed by each CAREC country since 2018. The CAREC Secretariat will provide technical, administrative, and organizational support during the implementation of the CAREC Tourism Strategy 2030. It also advocates adopting an incremental approach to effectively build countries’ ownership and devise the most appropriate institutional structure based on progress made.

19. Improving operationality and building countries’ ownership of CAREC Tourism requires the Senior Officials’ Meeting to decide on two critical areas: Governance and Funding to achieve sustainability.

20. Improving governance entails greater engagement and responsibility from the TFPG in managing, organizing, coordinating, and prioritizing defined and proposed common initiatives in delivering the CAREC Tourism Strategy outcomes. TFPG could convene twice a year with senior-level representatives of the CAREC National Tourism Organizations (NTO) in attendance. Three countries could lead the TFPG on a half-yearly rotative basis, starting in alphabetic order. The first with the presidency, the second with the “first chair” position, and the third with the “second chair” position. The objective of TFPG should be to provide guidance and professional support for implementing subregional tourism projects. The Meeting’s venue could be hosted by the country having the presidency. Creating a CAREC Tourism Coordinating Office (CTCO) should be considered to serve as the TFPG secretariat.



21. The CTCO activities could receive support from the Asian Development Bank (ADB), with its role evolving continuously depending on progress made, fostering, and facilitating effective collaboration among the CAREC governments, development partners, public enterprises, NGOs, private sector, academic institutions, and the media on the implementation of the CAREC Tourism Strategy (CTS). Its initial role could be serving as the secretariat for the TFPG to lead the development and promotion of the CAREC Region as a single tourism destination in collaboration with the public and private sectors. It could also coordinate project development and implementation under the CTS and facilitate tourism knowledge production, centralization, and dissemination. The CTCO's office should be staffed and overseen by an Executive Director and supported by an Operations Manager, a Financial Manager, a Brand Manager, and operational staff, also allowing interns to gain valuable international tourism experience based on qualifications and need. The setting-up, including the CTCO charter, might require support from ADB.

#### **D. Sustainability of CAREC Tourism**

22. The sustainability of CAREC tourism is highly linked with its funding, on which a decision regarding the model to be followed needs a decision from CAREC Senior Officials' Meeting to be held on 13-14 June in Tbilisi, Georgia. There are fundamentally two distinct options to consider: (i) countries' budgets; and (ii) the development of own revenues supported by the countries' actions.

23. The **countries' budgets model** consists of contributions from the member countries to the budget of the CTCO activities and TFPG venues. The own revenues model defines revenues (ex., fees, advertising, etc.) originating from activities on which all member countries collaborate through enforcement (ex., common TVET certificate's annual fee; common quality of service label annual fee, etc.). The estimated TFPG meeting costs can reach \$150,000 a year. The operating costs of CTCO could reach US\$350,000 per year (staff of 7, web portal maintenance, content development, marketing, and other expenses). A total envisaged cost of US\$500,000 per year could be expected. The annual monetary contribution and the associated criteria should be discussed during the Tourism WG Meeting and proposals prepared for the Senior Officials Meeting of June 2023 for recommendation, including if the own revenues model shall be adopted, as it could be possible to have the difference between the revenues and costs be covered by the countries' budgets or returned in case of higher revenues than costs.

#### **E. Projects being implemented**

- **Development and Implementation of Common Health and Safety Protocols and Standards under the Almaty-Bishkek Economic Corridor (ABEC)**

24. The pilot project, included under the quality and standards strategic pillar in the regional tourism investment framework, supports the development of the *Almaty–Issyk Kul tourism cluster*. It aims at reviewing existing COVID-19 health and safety protocols and measures prepared by Kazakhstan and the Kyrgyz Republic in the tourism sector. It provides recommendations integrated into the countries' regulations based on international best practices. It will also support the capacity building of public and private tourism stakeholders to adopt and implement adequate health and safety measures in a coordinated manner. The pilot project was implemented by the United Nations World Tourism Organization (UNWTO) and completed in Q2 2022.

- **Development of Accommodation Classification System for ABEC**

25. This project also contributes to implementing the quality and standards strategic pillar of the tourism strategy 2030 and will support the development of the *Almaty–Issyk Kul tourism cluster*. It aims to develop a regionally harmonized Accommodation Classification System that will indicate the standards found at individual establishments to consumers and intermediaries. As the hospitality sector represents a fundamental tourism component, quality standards must be monitored and enforced effectively by applying a regionally harmonized system to help Kazakhstan and the Kyrgyz Republic develop and market regional tourism. The UNWTO has implemented the project, which was completed in Q1 2023.

- **Development of Accommodation Quality Evaluation System, Quality Label, and price Benchmarking in Pakistan**

26. This pilot project is an alternative pilot to the ABEC Voluntary Classification System and contributes to implementing the quality and standards strategic pillar of the tourism strategy 2030 and will support the development of the *Karakorum–Wakhan and Golden Coast Clusters*. It aimed to develop a highly cost-effective harmonized quality assurance system for visitors regarding accommodation establishments, extendible to other activities of the value chain, and a monthly tourism price benchmarking to allow more effective pricing practices and improved private sector investment. This quality assurance system is fully based on Artificial Intelligence algorithms. It has no intervention of the service provider, only the customers. PTDC's National Tourism Competitiveness Index at the federal and Provincial levels project, aligned with correspondences with the World Economic Forum's (WEF) International Travel and Tourism Development Index (TTDI) included the necessary quality and price sub-indexes data. The next stage is to use the concept and data towards implementing a National Quality Label, thus requiring funding from IFIs to support the capacity building and promotional efforts.

- **Sustainable Tourism Development Project in Mongolia**

27. The [project](#) has been designed in alignment with the CAREC Tourism Strategy 2030 and responds to the need for improved visitor sanitation facilities in the *Altai tourism cluster*. It comprises a loan of \$30.0 million and a grant of \$2.0 million, with implementation in 2022-2026. The project will support tourism development in three *aimags* (provinces) of western Mongolia, focusing on inclusive benefits for communities, nature-based solutions to protect wilderness and heritage values and post-COVID-19 recovery and resilience. The project has four outputs: (i) inclusive planning and capacity for community-based tourism enhanced, (ii) enabling infrastructure constructed, (iii) sanitation and waste management improved, and (iv) management of cultural heritage sites and protected areas strengthened. It will build the capacity of residents and the private sector for community-based tourism, create jobs by establishing tourist streets and visitor complexes, and strengthen the management of five protected areas and heritage sites through improved visitor and sanitation facilities.

- **Tourism Satellite Account in Tajikistan**

28. This ADB-supported project, implemented by UNWTO, contributes to implementing the Strategic Pillar 5 - Market Intelligence of the tourism strategy 2030 and will support the Heart of Central Asia cluster. It aims to develop a Tourism Satellite Account (TSA) as an international best practice in tourism statistical economic impacts measurement, following UNWTO's

guidelines. This project consisted of the proposal of a TSA concept adapted to Tajikistan and implementation roadmap, the performance of a relativity-based Inbound Tourism spending assessment for 1-day visitors and tourists, and the development of a Domestic Tourism Survey for marketing purposes only. The entire TSA is expected to be subject to the first experimental TSA exerciser to be done by 2024/ 2025 upon completion of the Household Survey for Domestic and Outbound Tourism and the supply side surveys.

- **Tourism Satellite Account in Kyrgyz Republic at National and sub-national levels**

29. This project, implemented by the Kyrgyz National Statistics Committee (KNSC), also contributes to implementing the Strategic Pillar 5 - Market Intelligence of the tourism strategy 2030 and will support the Heart of Central Asia cluster with an alternative implementation process than used by Tajikistan. This project comprises the design and implementation of the TSA methodology following UNWTO's guidelines, design, and performance of demand (Inbound, domestic and outbound tourism) and supply side (tourism business registry, tourism activities) surveys, training and capacity building to the KNSC key staff, the use of an innovative digital platform to collect hard tourism data suitable for TSA and comparability of the results with the traditional methods, use of the collected data in performing the first national and sub-national TSA experimental compilation. The project started in December 2022 and is to be completed in December 2023.

#### F. CAREC 2030 Results Framework: Tourism Sector

30. The CAREC 2030 Results Framework was endorsed at the 19th CAREC Ministerial Conference (MC) on 7 December 2020. It includes outcome and output indicators across the five operational clusters of the CAREC 2030 Strategy. Under operational cluster 2 (trade, tourism, and economic corridors), the following progress has been achieved in the outcome and output tourism indicators from 2020 to 2021:

**Table 1. CAREC 2030 Results Framework: Tourism**

<b>Outcome</b>	<b>Indicator</b>	<b>2017</b>	<b>2019</b>	<b>2021</b>
Tourism competitiveness and positioning of the CAREC region as a globally attractive tourism destination enhanced	CAREC countries' TTDI rank increased. (base 100 index in 2019: 3.84)	2 CAREC countries within the top 70 ranks (PRC 15, Georgia 70)	4 CAREC countries within the top 70 ranks (AZE 59, PRC 15, GEO 47, KAZ 66). Index = 100	4 CAREC countries within the top 70 ranks (AZE 63, PRC 12, GEO 44, KAZ 66). Index = 100.80
<b>Output</b>	<b>Indicator</b>	<b>2017</b>		<b>2021</b>
Regional tourism projects approved	Regional tourism projects conceptualized and approved	N/A		1 CAREC regional tourism TA project approved in 2018; and 2 projects approved and initiated under the ABEC area

Institutional mechanism for implementing joint regional tourism initiatives established	Expert groups and regional tourism agency established and operationalized	N/A		CAREC TFGP was established in 2018. Since then, three meetings of the tourism focal points group have been held (Oct 2018; Dec 2019; Jan 2021).
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**II. CHALLENGES AND KEY ISSUES**

31. At the time of its formulation, the CAREC Tourism Strategy 2030 took into full consideration not only the challenges that countries’ tourism sectors were facing pre-COVID<sup>11</sup> but also the expected new patterns and trends derived from the pandemic. These include: (i) increased importance of domestic and regional tourism; (ii) emergence of safe travel corridors or travel bubbles; (iii) greater focus on sustainability and responsible travel; (iv) growing importance of developing unique and personalized local travel experience; and (v) increased use of digital technologies, online platforms, and social media. By gradually implementing regional projects and initiatives across its five strategic pillars, the CAREC Tourism Strategy 2030 will help countries’ tourism sectors bounce back stronger and faster and restore travelers’ confidence and trust by promoting the region as a safe and resilient tourism destination.

32. The geopolitical, economic, social, climate change and financial challenges derived from the Ukrainian invasion by Russia, in tandem with increased conflictuality in the Pacific, will shape the tourism sector in the CAREC region for the coming decades. Despite increased capital costs for investment, the region shall be able to provide interesting investment opportunities for the private sector if the countries collaborate more effectively in jointly promoting their common tourism brand as an umbrella internationally.

33. Air travel is responsible for 30%<sup>12</sup> of the total GHG emissions in the travel and tourism industry, which responds to 8% of the global GHG emissions. Currently the low regional air connectivity between CAREC countries, impose a larger than reasonable GHG footprint as the amount of passenger seat kilometers is exacerbated by passengers needing to fly many more hours through main Middle East and Turkey hubs, compared to direct flights. Improved collaboration and coordination would result in improved connectivity, lower prices, and increased profitability for CAREC airlines, while simultaneously increase the number of regional tourists.

**III. WORK PROGRAM FOR JULY 2022–JUNE 2024**

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<sup>11</sup> These include limited access to and between CAREC countries, complex and nonuniform visa requirements and border arrangements, inconsistent quality of tourism infrastructure and services, skills shortages, lack of reliable tourism data and statistics, and low awareness and knowledge about the tourist attractions in CAREC countries.

<sup>12</sup> 9. above

34. The implementation of the CAREC Tourism Strategy 2030 will continue over the next 12 months. Regional projects and initiatives, as well as analytical and knowledge products to be completed and/or initiated from July 2023–June 2024 include the following:

- CAREC Tourism Virtual Portal launch during the CAREC MC (paragraph 10)
- Implementation of Common Health and Safety Protocols and Standards under ABEC (paragraph 23)
- Promotion of Accommodation Classification System for ABEC (paragraph 24)
- Approval of the geographical scope of the 4 projects identified for conceptualization during the CAREC Senior Officials’ Meeting to be held on 13-14 June in Tbilisi, Georgia (paragraph 15), and delivery thereof.
- Approval of the governance and sustainability model for CAREC Tourism during the CAREC Senior Officials’ Meeting to be held on 13-14 June in Tbilisi, Georgia (paragraph 17), and technical assessment for its set-up.

35. The next CAREC tourism focal point meeting will be face-to-face in Q4 2023. The objective of the meeting will be to (i) Finalize the Tourism Portal to be launched during the CAREC MC in November 2023; (ii) Present the statistics and comparability of the CAREC Tourism Portal with those of competing tourism regions; (iii) Present the conceptualisation of the 4 identified projects; (iv) Review and update the CAREC regional tourism investment framework 2021–2025, including discussion on priority regional projects to be conceptualised over the next 12 months, the assessment of the climate change impacts, and its monitoring scheme<sup>13</sup>; (v) Prepare initial analysis on Climate Change impact to Tourism Industry in CAREC region with a proposed action plan (in 2024).

#### IV. DELIVERABLES FOR 2023 MINISTERIAL CONFERENCE

36. The following list provides an overview of deliverables to be achieved until end of 2023.

<b>Deliverables</b>	<b>Timing (2023)</b>	<b>Description</b>	<b>SOM/MC action</b>
CAREC Tourism Portal launched	Q4	CAREC tourism portal ( <a href="http://www.visitsilkroad.org">www.visitsilkroad.org</a> and <a href="http://www.visitsilkroad.com">www.visitsilkroad.com</a> ) containing information on tourism regions and attractions in CAREC countries and promoting services of local tourism businesses.	For information
Assessment on the Improvement of the infrastructure and services, including	Q3	<ul style="list-style-type: none"> <li>• Report on the project's description, rationale, and</li> </ul>	For information

<sup>13</sup> A possibility could be the development of a “climate Change mitigation index,” that could have correspondence with the WEF TTDI, for national and subnational levels of the CAREC Countries, in line with the Pakistan NTCl developed in 2022-3 and being implemented.

water supply and sanitation, sewage, and solid waste management, environmentally sustainable concepts, including building units based on renewable energy sources in pilot areas and a network of public eco-toilets in remote areas suitable to demanding visitors.		scope; initial financial and economic pre-feasibility; initial social and environmental impact assessment; and identification of implementation agencies, timeline, and potential financing options. • Presentation materials	
Assessment on the Upgrading and rehabilitating historical and culturally relevant tourist attractions in integration with urban planning and development, Institutional improvements, improved access to disabled, and capacity-building programs for stakeholders in major historical cities	Q3	• Report on the project's description, rationale, and scope; initial financial and economic pre-feasibility; initial social and environmental impact assessment; and identification of implementation agencies, timeline, and potential financing options. • Presentation materials	For information
Assessment on the development of a common registry of tourism assets and data collection, their content, and their management to allow effective and cost-efficient use by public entities, government officials, travelers, guides, and tour operators/agents for intelligence gathering	Q3	• Report on the project's description, rationale, and scope; initial financial and economic pre-feasibility; initial social and environmental impact assessment; and identification of implementation agencies, timeline, and potential financing options. • Presentation materials	For information
Assessment on the branding, strategy, planning, budgeting, and funding sources for implementing the common brand "Visit Silk Road," integrating additional features for the CAREC tourism portal, and developing a "CAREC tourism service quality label innovative system"	Q3	• Report on the project's description, rationale, and scope; initial financial and economic pre-feasibility; initial social and environmental impact assessment; and identification of implementation agencies, timeline, and potential financing options. • Presentation materials	For information
Project on "Development and Implementation of Common Health and Safety Protocols and Standards under ABEC" completed	Q1	Report on existing COVID-19 health and safety protocols and measures in Kazakhstan and the Kyrgyz	For information

		Republic, and recommendations to be integrated in the countries' regulations based on international best practices.	
Project on "Development of Accommodation Classification System for ABEC" completed	Q1	Report on unified Accommodation Classification System for Kazakhstan and the Kyrgyz Republic, including regulations, and recommendations for its implementation and enforcement.	For information