



CAREC Regional Workshop

Promoting Regional Tourism Cooperation under CAREC 2030

Concept Note

Background

Over the past decades, tourism has experienced continued growth and has become a major generator of jobs and a key driver of inclusive and sustainable socio-economic development worldwide. The tourism sector accounts for more than 10% of the world's GDP, 7% of global trade and one in ten jobs.¹ In 2017, international tourist arrivals reached 1,323 million, a 7% increase compared to 2016. Asia and the Pacific was the second most visited region after Europe, with 324 million international arrivals. This upward trend has further continued in 2018 as the first four months have recorded a 6% growth compared to the same period last year. This growth has been led by Asia and the Pacific region (8%) and Europe (7%).

CAREC is a diverse region with areas and routes rich in history and culture, and arresting natural endowments that traverse national boundaries. It also has a wealth of biodiversity, especially the mountainous areas of the region, with several unique and/or endangered plant and animal species. The tourism experiences offered to tourists – i.e. the things to see and do – should meet market expectations, matching demand to supply. The CAREC countries possess both individually and collectively a vast range of natural and cultural resources to attract many segments of the leisure market, while increased commercial development is boosting tourism for business purposes. However, to date, tourism product development has been small scale and largely uncoordinated, with relatively few cross-border collaborations. Increased dialogue between private sector operators across borders to develop and exploit product opportunities can bring increased mutual benefits. The public authorities' role is to ensure that the obstacles to such collaboration are minimized, consistent with the aims and goals of sustainable tourism.

The tourism sector has boomed in Caucasus countries (Azerbaijan and Georgia). Between 2012 and 2017, the share of total employment taken up by the tourism sector has increased from 7% to over 13% in Azerbaijan, and from 16% to nearly 27% in Georgia. Contribution of the sector to the GDP has also nearly doubled in both countries. In the east, China has emerged as a world-leader in tourism. Many CAREC countries, however, are lagging behind other Asian economies when it comes to tourism development. In the five Central Asian republics, tourism accounted for 5.5% of the GDP in 2017 and employed 1,085 thousand people (4.2% of total employment). The contribution of the tourism sector to the Pakistan's GDP (7.4% in 2017)² can also be further enhanced.

Access to, between and around the countries of the CAREC region is a fundamental requirement for national and regional tourism to take place. Transport facilities need to be of standards provided in other destination areas, with services on a regular and reliable basis. Border control arrangements –i.e. visa requirements, methods of obtaining and cost, passport control systems and times for clearance– should not be onerous or cause delay, and should meet international standards. This is not the case in all CAREC countries.

¹ 2017 Annual Report, World Tourism Organization

² World Travel and Tourism Council.

The ranking of CAREC countries in the Travel and Tourism Competitiveness Index of the World Economic Forum can also be improved.³ Inconsistent quality of transport and tourism services infrastructure; cumbersome visa requirements and border crossing procedures; skills shortages; limited access to public utilities, particularly in rural areas; and a challenging business environment are some of the existing barriers that hinder tourism development in CAREC member countries. Market knowledge of the CAREC countries is generally low –though growing in some instances– and necessitates marketing and promotional action to create awareness of, and interest in, the tourist attractions of the countries on a region-wide basis and in respect of the sub-regions within CAREC.

There is a need to address many of these shortcomings through management and vocational training programs and certification. Education and training programs can often be more effective if organized on a multi-country basis thereby ensuring that common standards are achieved across the countries that tourists experience.

The essence of tourism is to create and deepen socio-economic and cultural ties across countries, improve connectivity, and foster better dialogue by bringing people and nations closer together. Thus, promoting cooperation in the tourism sector is one of the operational priorities under the CAREC 2030 strategy. CAREC, as a regional platform, can play a key role in unlocking the region's large untapped tourism potential. There is also an opportunity to make tourism providers more responsible.

The Proposed Regional Workshop

The CAREC Secretariat is formulating a draft scoping study to identify opportunities for enhancing and expanding cooperation among CAREC countries in the tourism sector to maximize economic opportunities while managing possible negative socio-cultural and environmental impacts. The study will also seek to identify and analyze key challenges and existing needs for promoting a regional approach to tourism development and operations.

The main objective of the Regional Workshop is to identify inter-country and CAREC-wide initiatives that will promote tourism development in the region and increase tourism cooperation among countries. The workshop will: (i) solicit feedback and inputs from key stakeholders on the draft CAREC tourism scoping study; (ii) deliberate on key challenges and opportunities for regional initiatives and collaborative actions in the tourism sector; and (iii) provide a platform for dialogue and interaction between tourism-related government agencies, private sector and civil society organizations of CAREC member countries.

This workshop will thus help to establish the roadmap of ways in which the countries of the CAREC region can work together to resolve difficulties in key areas such as travel facilitation, human resource development, product development and marketing. Consultation with CAREC members at the workshop will enable full account to be taken of the prevailing situation and plans for tourism development to identify potential cross-border initiatives and collaborations. Experiences from other international regional cooperation initiatives will be drawn on.

³ The WEF Travel and Tourism Competitiveness Index covers 136 economies, including all CAREC countries except for Afghanistan, Turkmenistan and Uzbekistan.



Participants: The regional workshop targets senior government officials in charge of tourism development, and some representatives of tourism associations and the private sector, including regional and international tour operators specialized in the region.

Date/Venue: 23–24 October 2018 – Wyndham Hotel, Tashkent, Uzbekistan.

Organization: The Forum will be jointly organized by the CAREC Institute and the CAREC Secretariat. Support and contributions from UNESCO and the Greater Mekong Subregion (GMS) Program will be sought.



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23–24 October 2018
Wyndham Hotel
Tashkent, Uzbekistan

AGENDA

Day 1: Tuesday, 23 October 2018

08:30–08:55 Registration

08:55–09:10 **Welcome Remarks**

Mr. Shukhrat Vafaev

Executive Director of the Fund for Reconstruction and Development, Deputy Chairman, State Committee for Investments/ CAREC National Focal Point, Uzbekistan

Mr. Ulugbek Kasimkhodjaev

Acting First Deputy of Chairman

State Committee for Tourism Development, Uzbekistan

09:10–09:20 **Opening Remarks**

Ms. Cindy Malvicini

Officer-in-charge, Uzbekistan Resident Mission, ADB

09:20–09:30 **Introduction to the Agenda**

Mr. Safdar Parvez

Director, Regional Cooperation and Operations Coordination Division, Central and West Asia Department (CWRC), ADB

09:30–10:45 **Session 1: A Regional Approach to Sustainable Tourism Development for CAREC**

Moderator: Mr. Safdar Parvez, Director CWRC, ADB

- *“Draft Scoping Study on Promoting Regional Tourism Cooperation under CAREC 2030”* – Presentation by Mr. Robert Travers, Tourism Specialist, ADB Consultant (15 min.)
- *“Linkages between Tourism Cluster Development, Integrated Urban Development and Inclusive Economic Growth”* – Presentation by Mr. Yong Ye, Director, Urban and Water Division, Central and West Asia Department (CWUW), ADB (15 min.)

Open discussion (45 min.)

10:45–11:10 Coffee/Tea break and group photo

11:10–12:00 **Session 1 (continued)**

- “*Comparative Analysis of Tourism Indicators in the CAREC Region*” – Presentation by Mr. Yergali Dosmamgambet, Deputy Director II, CAREC Institute (10 min.)
- “*Joint Tourism Proposal under Almaty–Bishkek Economic Corridor (ABEC)*” – Presentation by Mr. Kristian Rosbach, Economist (Regional Cooperation), ADB and Mr. Carlos Faria, ADB Consultant (15 min.)

Open discussion (25 min.)

12:00–13:30 Lunch

13:30–15:10 **Session 2: Facilitating cross-border routes and inter-country tourism products**

Moderator: Mr. Robert Travers, Tourism Specialist, ADB Consultant

- “*Lessons Learnt in Promoting Regional Tourism Cooperation in Southeast Asia*” – Presentation by Mr. Jens Thraenhart, Executive Director, Mekong Tourism Coordinating Office (15 min.)
- Presentation by Miras Tulebayev, Head of International Cooperation and the Investment Promotion of the Committee of the Tourism Industry, Ministry of Culture and Sport, Kazakhstan (10 min.)
- Presentation by Mr. Chubak Omorov, Deputy Director, Department of Tourism, Ministry of Culture, Information and Tourism, Kyrgyz Republic (10 min.)

Open discussion (25 min.)

- Presentation by Ms. Konul Nuriyeva, Advisor of Regional Development and Planning Department, State Tourism Agency, Azerbaijan (10 min.)
- Presentation by Ms. Aziza Ibragimova, Leading Specialist, International Relations Unit, Committee for Tourism Development, Tajikistan (10 min.)

Open discussion (20 min.)

15:10–15:30 Coffee/Tea break

15:30–17:00 **Session 3: Managing tourism impacts on culture, heritage and the environment**

Moderator: Mr. Yong Ye, Director CWUW, ADB

- Presentation by Ms. Kristine Tovmasyan, Natural Sciences Specialist and Ms. Muhayyo Makhmudova, Culture Programme Officer, UNESCO (15 min.)
- Presentation by Mr. Ulugbek Kasimkhodjaev, Acting First Deputy of Chairman and Mr. Sadiq Badak, Adviser to the Chairman, State Committee for Tourism Development, Uzbekistan (10 min.)

Open discussion (25 min.)

Session 3 (continued)

- Presentation by Ms. Zhang Yang, Associate Research Fellow, China Tourism Academy, People's Republic of China (10 min.)
- Presentation by Ms. Saranjav Bayasgalan, Director General, Tourism Policy Coordination Department, Ministry of Environment and Tourism, Mongolia (10 min.)

Open discussion (20 min.)

Day 2: Wednesday, 24 October 2018

09:00–10:25 Session 4: Addressing the Tourism Marketing Challenge

Moderator: Ms. Ramola Naik Singru, Senior Urban Development Specialist, CWUW, ADB

- Presentation by Mr. Babar Khan, Additional Secretary Tourism, Sports, Tourism, Archaeology, Museums and Youth Affairs Department, Government of KP, Peshawar, and Mr. Aftab ur Rehman Rana, President, Sustainable Tourism Foundation Pakistan (10 min.)
- Presentation by Mr. Giorgi Bregadze, Head of Research and Planning Department of Georgian National Tourism Administration, MOESD, Georgia (10 min.)

Open discussion (25 min.)

- Presentation by Mr. Murtaza Azizi, Head of Communication and Tourism Activities, Tourism Department, Ministry of Information and Culture, Afghanistan (10 min.)
- Presentation by Mr. Ruslan Hydyrov, Specialist, company "Guneshli syahat" of the Union of Industrialists and Entrepreneurs, Turkmenistan (10 min.)

Open discussion (20 min.)

10:25–10:45 Coffee/Tea break

10:45–12:00 Session 5: Insights and Perspectives from the Private Sector

Panel discussion with tour operators specialized in the CAREC region, followed by Q&A

Moderator: Mr. Robert Travers, Tourism Specialist, ADB Consultant

Panelists: Ms. Feruza Nazarova, Director, Advantour LLC
Mr. Shiraz Poonja, CEO & Managing Director, Sitara Group of Travel
Ms. Zulya Rajabova, President, Silk Road Treasure Tours
Mr. Nikolay Serbin, Executive Director, Central Asia Travel

12:00–12:30 Session 6: Wrap-up and next steps

Mr. Safdar Parvez, Director CWRC, ADB and Mr. Yong Ye, Director CWUW, ADB

12:30–13:30 Lunch

13:30–18:00 Site visit – Snapshot of tourism operations in Uzbekistan