



# CAREC

## SENIOR OFFICIALS' MEETING

ЗАСЕДАНИЕ ВЫСОКОПОСТАВЛЕННЫХ ОФИЦИАЛЬНЫХ ЛИЦ

17-19 June 2025 | Cholpon-Ata City, Issyk-Kul, Kyrgyz Republic

# CAREC Visa Liberalization and Connectivity

CAREC Tourism Pre-SOM Side Event  
17 June 2025

**Brendan Sobie**

CAREC Aviation and Visa Liberalization Specialist  
Independent Aviation Analyst and Consultant

# Introduction

- The CAREC Visa Facilitation study was launched in April 2024 to assess current visa policies, bottlenecks impeding multi-country itineraries and a potential Silk Road Visa pilot program
- A draft was completed and circulated to CAREC member countries in August 2024 following meetings with stakeholders from all countries and missions to four countries (Kazakhstan, Uzbekistan, Tajikistan and Kyrgyz Republic)

Draft Study

## **Visa Liberalization and Facilitating Multi-Country Silk Road Itineraries in CAREC**

# Proposed Silk Road Visa

- The project initially envisioned a pilot program involving 4 countries for a Silk Road Tourist Visa, a concept that initially emerged several years ago
- However, during meetings with stakeholders from all 4 countries they uniformly indicated they no longer see a need for a Silk Road Tourist Visa given most of their main source markets are now visa free

## Number of visa free and e-Visa countries: as of July 2024

	Visa-Free Countries	e-Visa countries
<b>Uzbekistan</b>	<b>93</b>	<b>57</b>
<b>Tajikistan</b>	<b>87</b>	<b>140</b>
<b>Kazakhstan</b>	<b>83</b>	<b>109</b>
<b>Kyrgyz Republic</b>	<b>80</b>	<b>ALL</b>

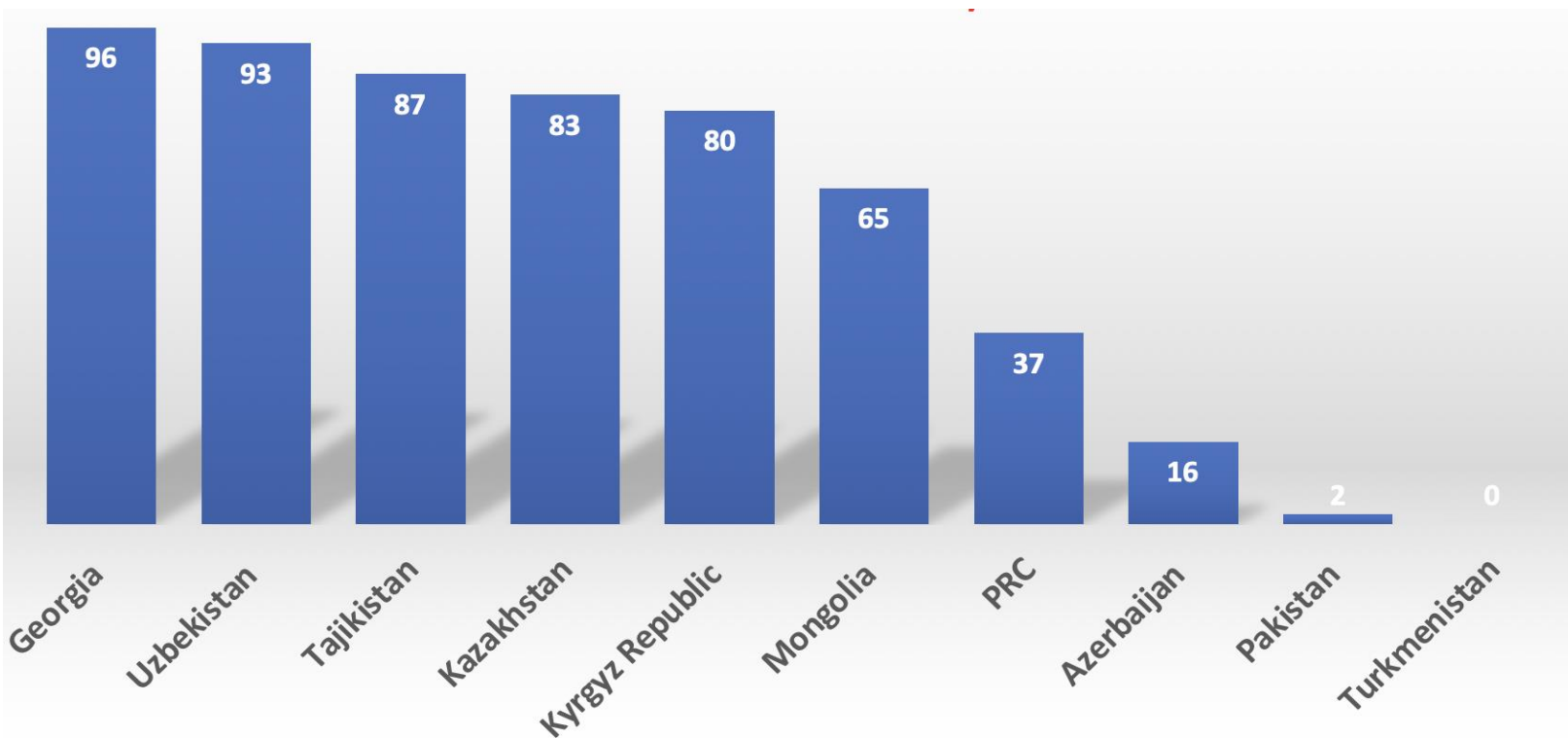
*Source: Draft Study, Visa Liberalization and Facilitating Multi-Country Silk Road Itineraries in CAREC*

# Proposed Silk Road Visa

- The concept of a Silk Road Visa (similar to the Schengen visa) is now generally seen as out of date and moot – as it was first proposed several years ago before visa free policies became common in Central Asia
- Kazakhstan and Uzbekistan also have dropped earlier plans to offer a joint tourism visa which was initially proposed in 2018 with the idea it could be later expanded to other Central Asian countries
- Kazakhstan and Uzbekistan discovered they had different requirements and systems for visas which were difficult to align
- A lack of wi-fi at land border crossings, particularly on the Kazakhstan side, and payment issues were also impediments

# Visa Facilitation

## Number of visa free countries for tourists with ordinary passports: as of July 2024



There has been significant visa liberalization in CAREC over the last several years, making it easier for tourists to visit, particularly tourists from outside the region as there has traditionally been visa free policies between most ex-Soviet countries

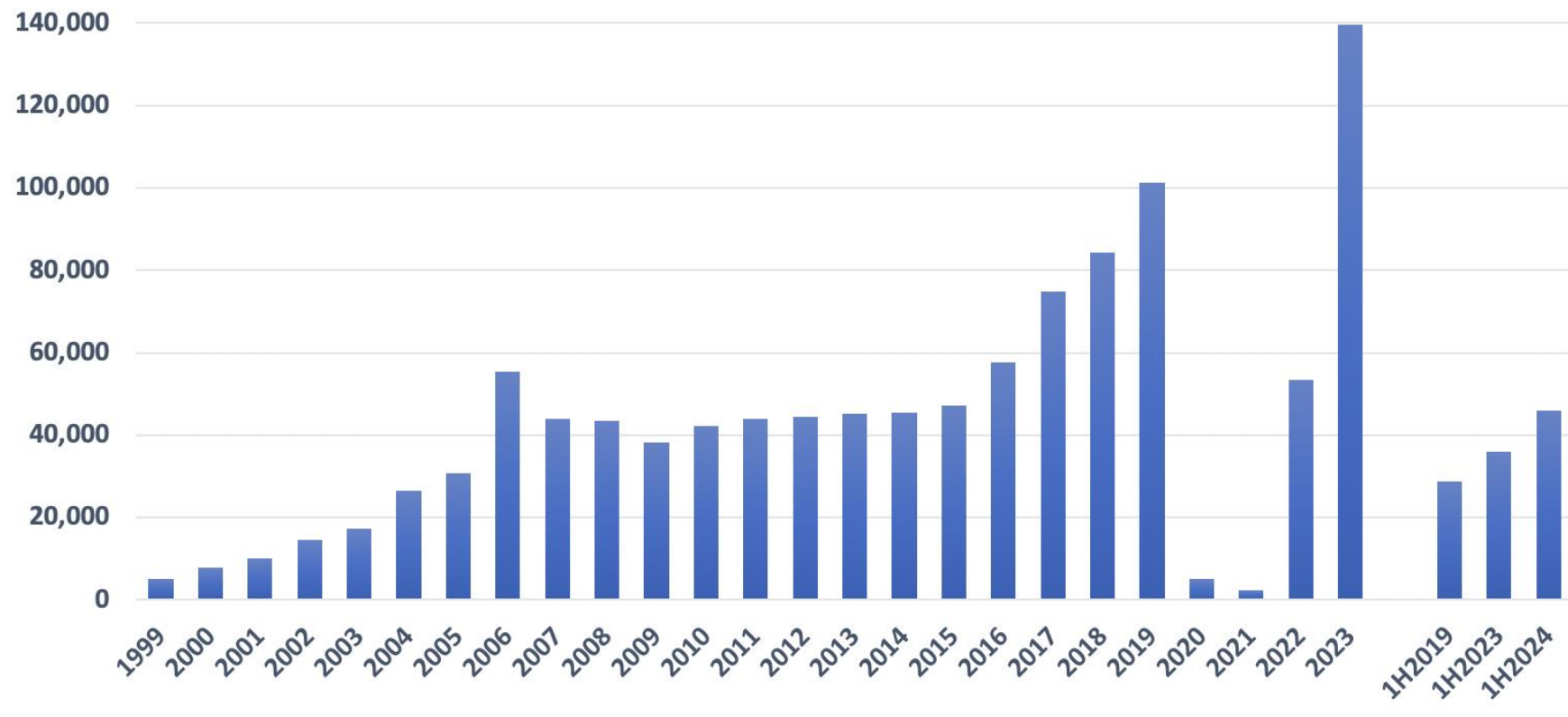
Source: Draft Study, *Visa Liberalization and Facilitating Multi-Country Silk Road Itineraries in CAREC*

# Visa Facilitation

- Nearly every CAREC country experienced a surge in visitor numbers in the decade prior to the pandemic, driven partially by visa facilitation as well as other forms of liberalization; Total international tourist numbers in CAREC excluding PRC nearly tripled from 2009 to 2019
- Back in 2009, only Georgia had a liberal visa regime; Kyrgyz Republic became the first Central Asian country with a liberal visa regime in 2012
- Six CAREC member countries now have extensive visa free regimes (Georgia, Kazakhstan, Kyrgyz Republic, Mongolia, Tajikistan and Uzbekistan)
- PRC has also significantly liberalized its visa regime since 2023 and 2 other CAREC member countries now have extensive e-Visa programs (Azerbaijan and Pakistan)

# Visa Facilitation

## Republic of Korea international tourist arrivals to Mongolia: 1999 to 1H2024



Source: Draft Study, Visa Liberalization and Facilitating Multi-Country Silk Road Itineraries in CAREC

- Mongolia provides the most recent example in CAREC of the impact from visa facilitation
- A new more liberal visa free policy was adopted at the beginning of 2023, when 34 countries were added to the visa-free list; South Korea, Mongolia's largest source market became visa-free in June 2022

# Principal Recommendation

- For many years visa requirements were a major impediment in attracting tourists from outside the region. However, border crossing issues is now universally viewed as the biggest impediment
- Without resolving the border crossing issues it will be difficult to attract tourists to consider multi-country itineraries, reducing the usefulness of other initiatives such as developing joint products and establishing joint marketing efforts under a single brand
- There is a lack of services at virtually all border crossings, forcing tourists to endure long queues without toilets, water, air conditioning and wi-fi
- Joint Border Crossing Facilities or One Stop Border Posts (OSBCs) are needed to improve service standards and avoid long unsheltered walks; green lanes for tour buses, staff training and better services are also needed

# Recommendations

- 1) Synchronization of visa free lists and conditions
- 2) Improvement to e-Visa websites and processes
- 3) Clear communication of visa requirements
- 4) Joint digital nomad visa and joint second home visa
- 5) Joint marketing and a regional tourism association
- 6) Joint expeditions to assess multi-country tourist routes



Tourism EXPO Japan, October 2023

# Recommendations



Korday Border Crossing (Almaty-Bishkek)

7) Improving border crossings (principal recommendation)

8) Improving air connectivity between Silk Road countries

9) Promotion of intra-CAREC travel

10) Developing PRC and India as source markets

11) Joint certification standards and training opportunities

12) Implementing standards for tourism data

13) Eliminating tourism registration and improving border zone permit processes

# Improving air connectivity in CAREC

- While intra-CAREC connectivity has improved it only accounts for a small share of the overall market and 80% of intra-CAREC routes are not served daily
- Several countries still do not have any connectivity with each other and many have very limited flights
- More routes and more flights on existing routes are critical to support trade, economic development and multi-country Silk Road itineraries
- CAREC could study opportunities and mechanisms for improving regional international connectivity within CAREC



# Improving Air Connectivity in CAREC

## Intra-CAREC international seat capacity growth by country: Summer 2025 vs Summer 2024 and Summer 2019

- There are now over 100 routes connecting CAREC countries, including over 50 PRC routes

Source: Sobie Aviation and OAG

Notes: Countries ranked by number of intra-CAREC routes in summer 2025

Note: Summer Schedule = 31 March to 26 October for both 2024 and 2019 and 30 March to 25 October for 2025

CAREC Country	vs 2019	vs 2024	# routes (2019 & 2025)
PRC	+104%	+47%	10 → 53
Kazakhstan	+99%	+31%	21 → 44
Uzbekistan	+182%	+51%	10 → 27
Kyrgyz Republic	+58%	+30%	11 → 17
Georgia	+213%	+19%	8 → 17
Azerbaijan	+112%	+22%	9 → 15
Pakistan	+40%	+14%	5 → 13
Tajikistan	+85%	+15%	6 → 12
Mongolia	+58%	+43%	8 → 9
Turkmenistan	-60%	+1%	4 → 2
<b>CAREC total</b>	<b>+105%</b>	<b>+34%</b>	<b>52 → 105</b>

# Improving Air Connectivity in CAREC

- PRC and the five Central Asian countries have agreed to jointly develop the “Air Silk Road,” leading to several new recently launched PRC-Central Asia routes
- Several new intra-Central Asia routes have been launched this year or last year:

<b>New route</b>	<b>Airline</b>	<b>New route</b>	<b>Airline</b>
Almaty-Issyk Kul	Asman Airlines, FlyArystan	Dushanbe-Astana	Somon Air
Almaty-Nukus	Uzbekistan Airways	Samarkand-Shymkent	Qazaq Air
Almaty-Osh	Air Astana	Tashkent-Atyrau	FlyArystan
Bishkek-Namangan	Centrum Air	Tashkent-Issyk Kul	Centrum Air, Silk Avia
Bishkek-Khujand	Asman Airlines	Tashkent-Osh	Aero Nomad

- Almaty-Tashkent and Bishkek-Tashkent also have new competitors

# Improving Air Connectivity in CAREC

- Centrum Air is launching Tashkent-Issyk-Kul on 19 June, Tashkent-Bishkek on 24 June and Bishkek-Namangan on 28 June
- Centrum launched Tashkent-Almaty and Tashkent-Baku in May 2025; it launched Tashkent-Tbilisi and Tashkent-Batumi in 2024
- Air Samarkand and Fly Khiva also launched Tashkent-Tbilisi earlier this year; this route is now served by four airlines compared one in 2023 (Uzbekistan Airways)



# Improving Air Connectivity in CAREC



- The 2024 “Air Silk Road” agreement with PRC and Kyrgyz Republic has led to plans for a new airspace corridor that is expected to open later this year from Kashgar to the border
- This will be only the second corridor between the two countries and will open opportunities for airlines to launch flights from Kashgar to Bishkek, Osh, Almaty, Tashkent and other cities
- There are opportunities for CAREC to support more new air corridors as well as digitalization of terrain maps/aeronautical charts and the implementation of Performance-based Navigation (PBN) – initiatives that can improve efficiency, reduce fuel burn and increase the viability of potential new routes

# Aviation Discussion

## CAREC international seat capacity growth by country (excluding PRC): Summer 2025 vs Summer 2024 and Summer 2019

- CAREC is the the world's fastest growing air transport market!

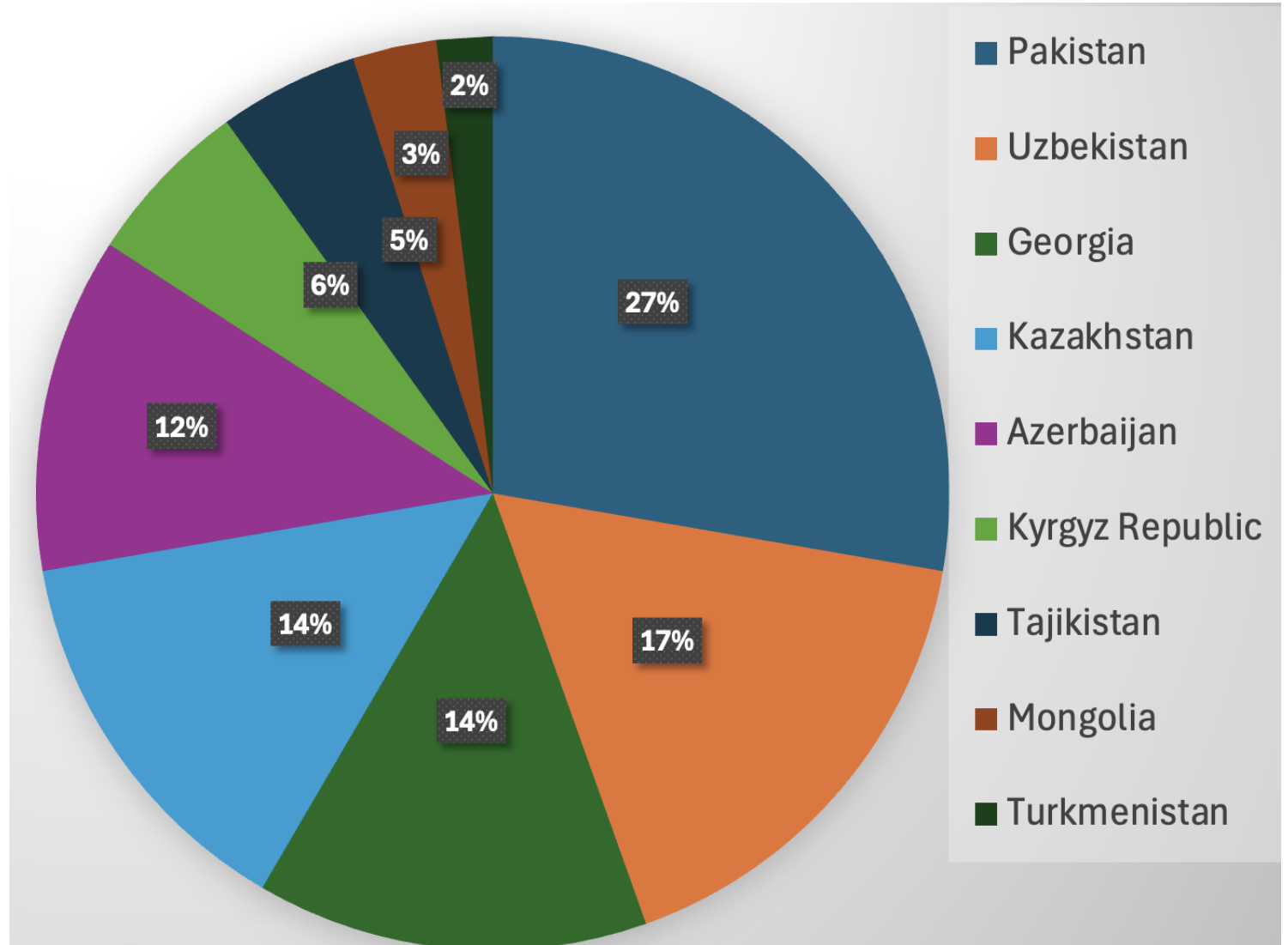
Source: Sobie Aviation and OAG

Note: Summer Schedule = 31 March to 26 October for 2024 and 2019 and 30 March to 25 October for 2025

CAREC Country	vs 2019	vs 2024
Uzbekistan	+124%	+16%
Tajikistan	+82%	+4%
Mongolia	+75%	+17%
Kyrgyz Republic	+69%	+5%
Georgia	+54%	+19%
Azerbaijan	+52%	+4%
Kazakhstan	+43%	+14%
Pakistan	+23%	+7%
Turkmenistan	+9%	+1%
<b>CAREC total</b>	<b>+51%</b>	<b>+11%</b>
<i>Central Asia total</i>	<i>+72%</i>	<i>+11%</i>
<b>Global total</b>	<b>+8%</b>	<b>+6%</b>

# Aviation Discussion

**CAREC international seat capacity share by country (excluding PRC): Summer 2025**



Source: Sobie Aviation and OAG

# Aviation Discussion

- Uzbekistan has experienced very rapid growth facilitated by liberalization
- There are now nine local passenger airlines operating 70 commercial passenger aircraft; in 2019 there was only one airline (Uzbekistan Airways) operating 23 commercial passenger aircraft (all at Uzbekistan Airways)

Rank	Airline	Current fleet
1.	Uzbekistan Airways (HY)	33 (10 A320neos, 7 787-8s, 6 767-300ERs, 5 A320ceos, 5 A321LRs)
2.	Centrum Air (C6)	9 (4 A320ceos, 2 A330-300s, 2 A321neos, 1 A320neo)
3.	Silk Avia (US)	9 (5 ATR 72-600s, 4 LET 410s)
4.	Qanot Sharq (HH)	6 (2 A330-300s, 2 A321neos, 2 A320ceos)
5.	Uzbekistan Express (HY)	4 (A320ceos)
6.	Air Samarkand (9S)	3 (1 A330-300, 1 A321ceo, 1 A321neo)
7.	Fly Khiva (2U)	2 (2 757-300s)
8.	Tashkent Air (TSK)	1 (1 A330-300)
9.	Asia Union Airlines (7Q)	1 (A320ceo)

# Aviation Discussion

Market	vs 2019	vs 2024	Share (2025)
India	+233%	+19%	2%
Southeast Asia	+151%	+24%	2%
PRC	+107%	+41%	5%
Intra-CAREC	+105%	+31%	7%
Türkiye	+85%	+12%	14%
Republic of Korea	+79%	+24%	3%
<b>CAREC overall</b>	<b>+51%</b>	<b>+11%</b>	
Middle East	+40%	+7%	35%
Russian Federation	+36%	+1%	21%
Rest of Europe*	+9%	+15%	8%

**CAREC (excluding PRC)  
international seat capacity  
growth by market:  
Summer 2025 vs Summer  
2024 and Summer 2019**

- Growth has been diversified with the Russian market slower than the average

Source: Sobie Aviation and OAG

Notes: \*Rest of Europe is Europe excluding Russian Federation and Türkiye

Summer Schedule = 31 March to 26 October for both 2024 and 2019 and 30 March to 25 October

# Aviation Discussion

## Annual passenger traffic for select CAREC airports: 2024 vs 2019

- Almaty is CAREC's biggest overall airport (including domestic and international traffic) but Tashkent is the biggest international airport
- Total passenger traffic (includes domestic) across all airports in Kazakhstan reached 30.0 million in 2024 and 13.5 million in Uzbekistan

Airport	2024 traffic (in millions)	vs 2019	vs 2023
Almaty (ALA)	11.43	+78%	+20%
Tashkent (TAS)	8.72	+94%	+28%
Baku (GYD)	7.54	+60%	+33%
Islamabad (ISB)	6.17	+14%	+9%
Tbilisi (TBS)	4.75	+29%	+29%
Dushanbe (DYU)	2.34	+65%	+5%
Ulaanbaatar (UBN)	2.17	+37%	+25%
Kutaisi (KUT)	1.72	+97%	+3%
Samarkand (SKD)	1.38	+186%	+36%

# Aviation Discussion

- Several small domestic airports have recently opened in Azerbaijan, Kyrgyz Republic, Tajikistan and Uzbekistan
- New domestic airlines have been launched in Kyrgyz Republic (Asman Airlines) and Uzbekistan (Silk Avia); Tajik Air has relaunched and there is also a proposal to launch a new domestic airline in Georgia
- CAREC could study strategies and policies for connecting smaller communities, including potential zero carbon small aircraft



# Aviation Discussion

- Small electric and hybrid electric aircraft should be under evaluation given the increased focus on sustainable tourism and sustainable aviation
- Airlines in other parts of the world (Europe, North America, Australia/New Zealand) are actively engaged and have committed to electric aircraft
- A CAREC country could also be an ideal testing ground for small electric aircraft, potentially replacing the LET 410 (used in Georgia and Uzbekistan) and the An-28 (used in Tajikistan)





# Thank you!

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