



Department
for International
Development



Tourism and development of economic corridors

Presentation



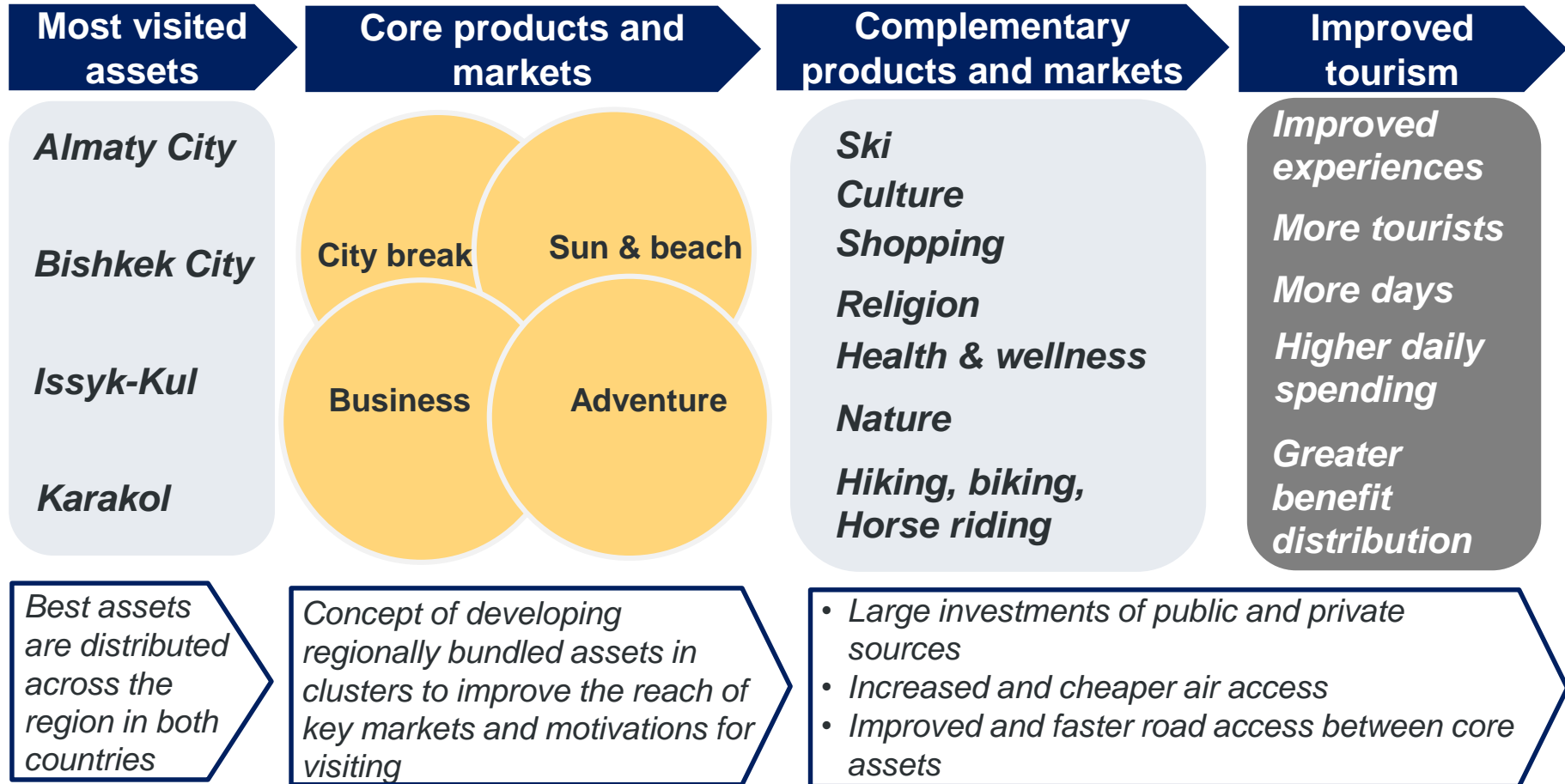
1 Fundamentals of regional cooperation in Tourism Development

2 Case of ABEC Joint Tourism Master Plan

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2 Case of ABEC Joint Tourism Master Plan

Why is it needed to work together in the ABEC region?

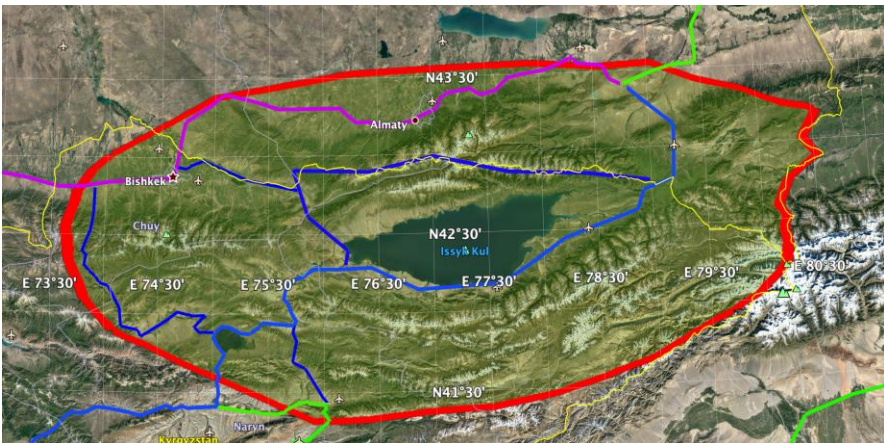


Working together reduces costs and increase the feasibility of projects

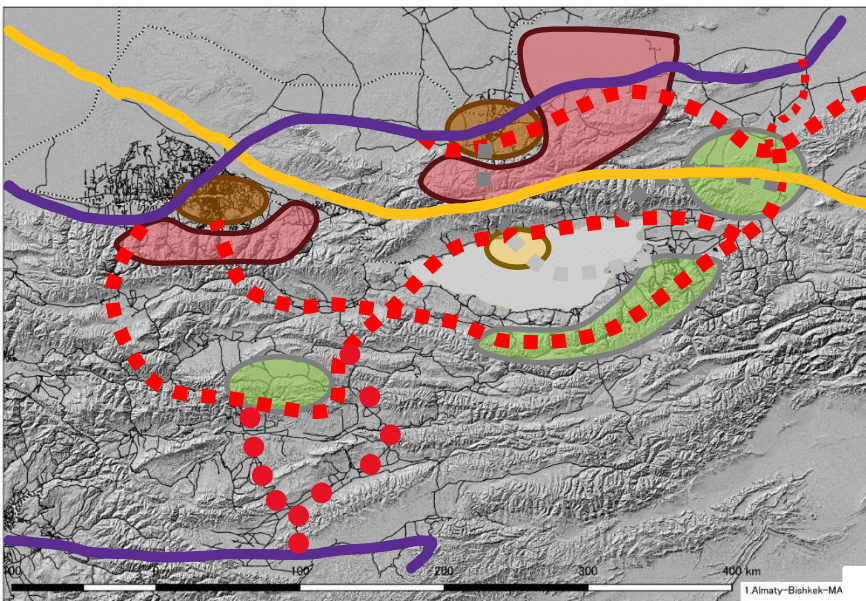
1 Fundamentals of regional cooperation in Tourism Development

2 Case of ABEC Joint Tourism Master Plan

Development Concept of the Join Tourism Master Plan ...



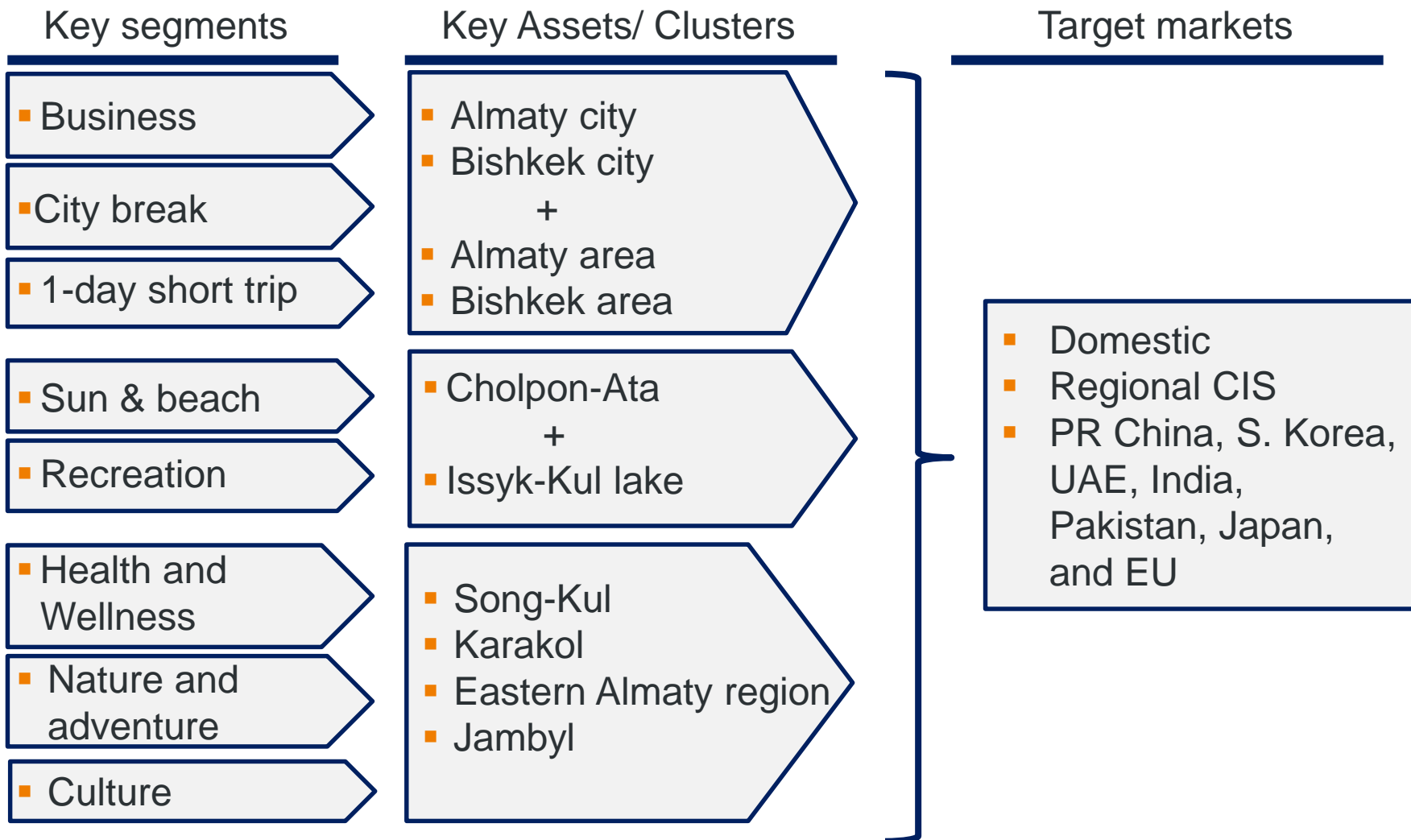
- ABEC Tourism Master Plan Area
- Historical Silk Road
- Proposed silk road bypass:
Shonzhy/ Charyn, Turgen,
Almaty, Bishkek, Taraz
- Proposed silk road bypass:
Shonzhy/ Charyn, Kegen, Typy,
Issyk-Kul, Bishkek, Song-Kul



- City Cluster
- Suburban Cluster
- Natural Area Cluster
- Resort Cluster
- Water Network
- Mountain Network
- Land Network
- Silk road
- Border with Kazakhstan

Silk road by-pass circuit system
and
integrated network of clusters

... Focusing on major primary motivations of visit, segments, and target markets



... built upon major foundation pillars,

- **Major foundation pillars** (principles) for tourism development:
 - ✓ Preservation of **nature as the main asset** through:
 - functional spatial planning (regulation on where to build what)
 - prevention of environmental degradation (water quality of lakes and aquifers, sewage treatment and solid waste management), and
 - preservation of potential future assets (Karakol airport).
 - ✓ Development of quality standards for the sector (accommodation rating, regarding quality of facilities, tour guides qualification, and branding)
 - ✓ Preservation of cultural practices and buildings relevant for tourism

... main Development Drivers,

- To develop main tourism clusters (city, sub-urban, resort, natural, and cultural) with **sub-plans including**:
 - ✓ zoning,
 - ✓ tourism infrastructure,
 - ✓ multi-lingual tourism information and signage,
 - ✓ certified tour guides, and
 - ✓ complementary services like (road support centres).
- The assets are **embedded in the clusters with**
 - ✓ inter- and intra-cluster transport concepts,
 - ✓ thematical and promotional specializations,
 - ✓ clearly outlined target markets (China, UAE, Korea, EU, Russia);
 - ✓ corresponding infrastructure (for example Chinese speaking guides, restaurants, and signage, or focus on health and wellness tourism around balneological assets, as PPP concessions).
- **Integration in the region**: circuits of regional experiences, facilitated by common visa regime, easy transportation modes, as well as regional branding, standards, and marketing to develop origin markets from more distant high-income countries

... developing key support projects, such as Improvement of access to the region, ...

✓ **Cheaper and increased air access:**

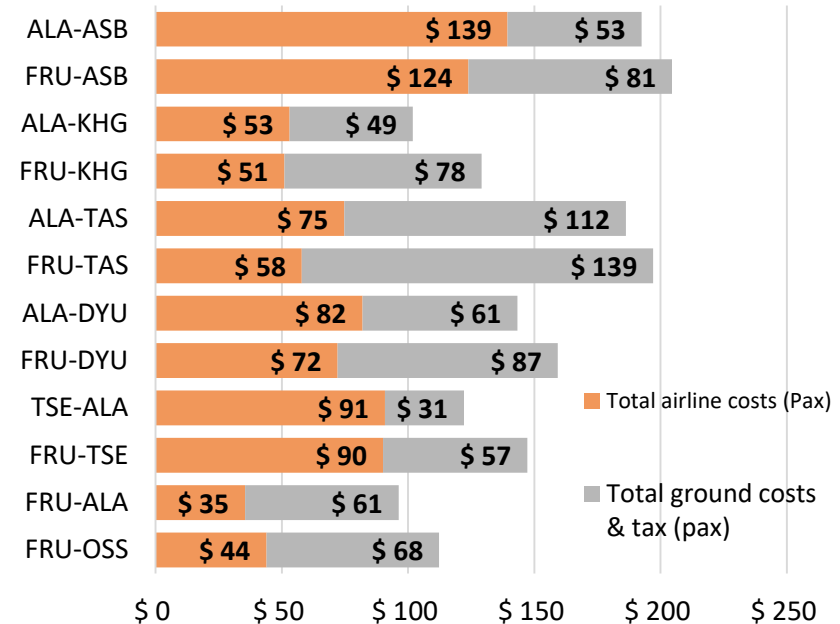
- improve regulation, and airport management to reduce ground costs per passenger.
- attract more airlines to be operate Bishkek, and develop of an air Hub in Almaty
- regional system of low-fee/cost airline model in central Asia (ex. SAS)
- Possible next step: regional airport tariff coordination

✓ **Faster road access:**

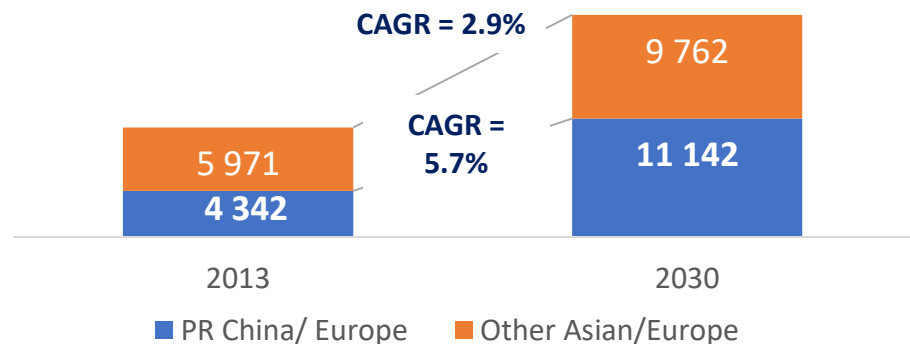
- Faster road trips between Almaty/Issyk-Kul/Karakol roads, to improve flows and investments.
- Silk Road visa and ABEC tourism pass to cross mountains

✓ **Effective institutional framework:**

- Well structures, capacitated and funded



Air Traffic; thousand trips between NE Asia and Europe



key projects – Institutional improvement

- The vast majority of the identified investments in the master plan require reforms to be feasible/bankable. Only a small portion of those can be implemented without the need of prior reforms and/or strong political commitment, to be at a risk level that could be acceptable by private investors.
- Suggested single institution with mandates, powers, and incentives to:
 - ✓ enforce preservation of natural and cultural assets
 - ✓ conduct functional planning and inter-ministerial/agency coordination
 - ✓ coordinate tourism asset development and cluster approach
 - ✓ serve as a one-stop shop for investors to negotiate concession design, incentives (for example water concession or long-term exclusivity for certain areas), and monitor and enforce service obligations, environmental and social contractual obligations;
 - ✓ generate revenues, with the goal of further capacitating the single agency/company and eventually setting up a tourism fund
 - ✓ develop a system of certification for accommodation, hospitality and tour guides in combination with skill development

Suggested Immediate Actions:

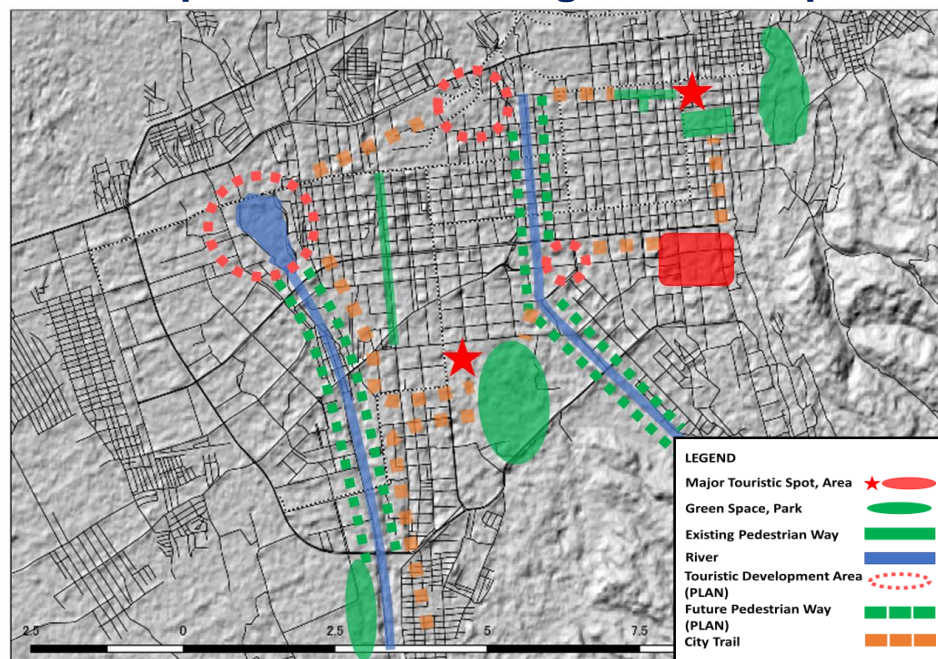
- Enforce the existing laws in protecting the natural assets:
 - Examples: run inspections and oblige the owners of resorts to comply with the 300 m. construction from the shore to allow the building of a trail around Cholpon-Ata, in KYG; Have inspectors issuing fine ordinances to environmental offences in KAZ
- Resolve the open-air coal mining in Kara-Keche (allow tunnel based only with high environmental standards);
- Curb Almaty city pollution caused by road transport;
- Implement the legal reforms and sector institutional framework;
 - Example: create a tourism coordination committee chaired by Prime Ministers while performing feasibility studies on the set-up of one centralized institution per country, well funded.
- Implement aviation sector reform, air hub in Almaty, improved route network in Manas
- Confirm investor requirements with world leading companies and conduct pre-feasibility studies, to conceptualize concession design
 - Example: define a package of priority high impact investments and work on an integrated support packaged with a development partner as honest broker in Turgen and Karakol

Key reforms required

- Legal reforms required to de-risk/facilitate foreign investors:
 - ✓ Foreign property ownership aligned with international standards
 - ✓ Passage rights for tourism activities, particularly trails
 - ✓ Expropriation regulations (criteria for fair price, how & whom appraises, declaration of public interest)
 - ✓ Law enforcement practices, fines and their collection, related to the environmental protection;
 - ✓ Urban planning and construction permits' regulations (colour, types of materials, size, demolition costs, etc.)
- PPP management:
 - ✓ Refine scheme design; attraction process; contracting process; monitoring and enforcement procedures';
 - ✓ De-risking options on concessions with exclusivity (for example mineral drinking water concession, gaming etc.)
- Institutional framework:
 - ✓ Consider only one agency with the following functions: (i) marketing, promotion, and statistics; (ii) funding and administration; (iii) regulatory, standards, quality, cadastre, compliance, skills and training (iv) planning, infrastructure, and product development.
- Reforms related to improved air access
 - ✓ by improving regulatory capacity of the civil aviation authority,
 - ✓ increase transparency of pricing,
 - ✓ consider regional low cost airline (following a similar model to Scandinavian Airlines;
 - ✓ protect Karakol airport for future air-route development
 - ✓ Declare Almaty Airport as national exception in traffic rights

Appendix 1: Cluster Development Proposals

Almaty city: large untapped potential to develop further and should be **used as catalyst to develop other tourism segments and products**



- **Trade shows:** local and regional
- **City break:** all year round

Require

- **Fairground** and multi-purpose convention facilities with international standards;
- **Implementation of the concept of a green and blue framework** to connect each existing point of interest in a coherent network on a city scale.
- Conditions for **low priced luxury goods' shopping experience.**

Key actions

- Setting **public transportation** service up to serve components of the green and blue framework;
- Developing the **walking and cycle paths network**, Integrating and valorizing **landscape and heritage**;
- Increasing contact spots between elements of the framework to ensure better connectivity;
- Implementing pedestrianized riverbanks filled with outdoor seating areas, green space and children's play areas which provide breathing space and visual relief in a compact environment;
- Develop **car free, shopping only cluster of streets**;
- **Develop world class trade fair premises with multi purpose convention centre.**

Cluster Development Suggestions

Almaty city: making it attractive for business and city break travellers, while enhancing the life quality of local residents.

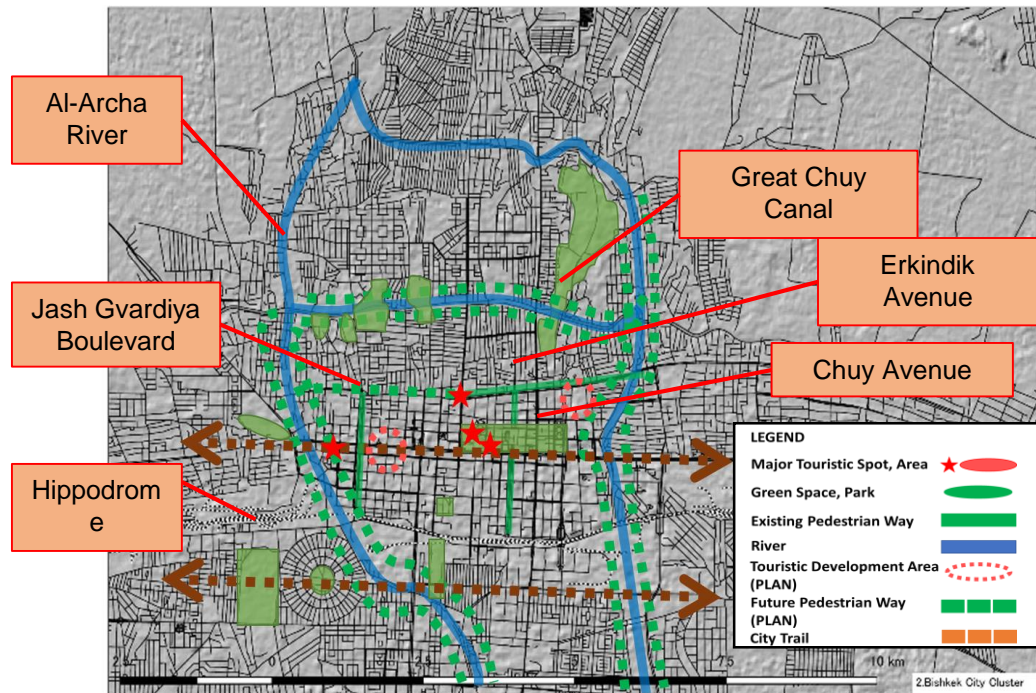


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Sustainable Tourism Development in the Central Asia Regional Economic Cooperation (CAREC) Region

Bishkek city: large untapped potential to develop further and should be **used as catalyst to develop other tourism segments and products**

Bishkek urban renewal turns to water and its green landscape



- **Trade shows:** local and regional
- **City break:** all year round

Require

- **Fairground** facilities with international standards;
- **Implementation of the concept of a green and blue framework** to connect each existing point of interest in a coherent network on a city scale.

Key actions

- Ensuring **continuity of the existing green and blue network on a city scale** (e.g. Chuy Avenue);
- Developing **walking and cycle paths** network for accessibility to interest points;
- **Revitalizing rivers and canals** to enhance the visual and physical connection of people and water;
- **Exploring the recreational use** of rivers and canals;
- Developing **cultural and entertainment offer** (theater, opera, shopping);
- **Improving the quality (physical and visual) of the urban landscape;**

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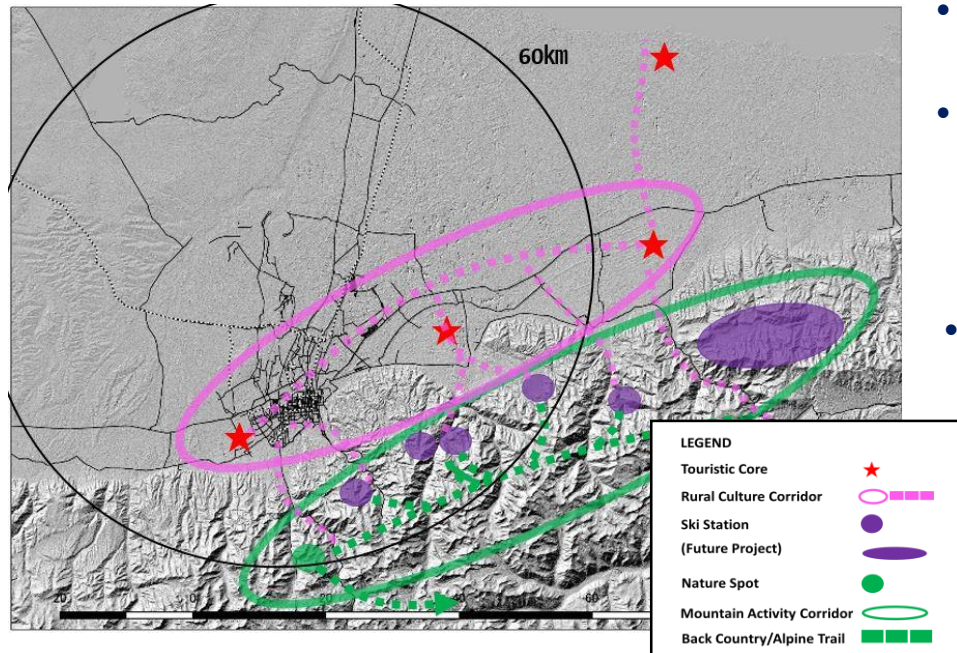
Bishkek city: making it attractive for business and city break travellers, while enhancing the life quality of local residents.



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Almaty area: to enable effective and full utilization of the resources of short trips from Almaty all-year-around, for domestic visitors and trip extensions of foreign tourists



- 40-60 km **short trips for 1-day activities**, all-year-around
- **Complementary** to business and city-break, to extend length of stay

Require

- improving the quality and comfort of travels, **diversifying the touristic offer** and promotion of the region;

Connection between the assets

Key actions

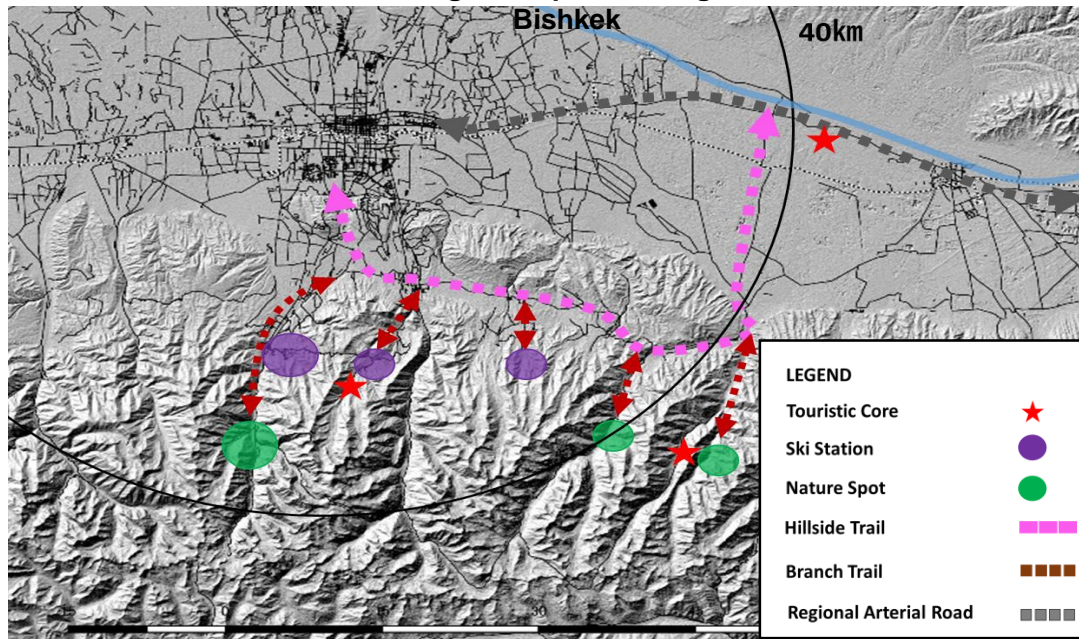
- Creating a **cultural and rural corridor** that makes use of cultural and rural assets of the area;
- Creating a **natural corridor** that makes use of environmental and **alpine assets of the area** (lake, mountain, skiing areas, trekking paths...);
- Developing the **walking and cycling path networks** which provide linkage between tourist assets and corridors;
- Creating **new ski resorts that will enable to expand skiing area** (e.g. Turgan Ski Resort).

Almaty area: connecting the existing assets to maximize its use all-year-round



Bishkek Region: to enable effective and full utilization of the resources of short trips from Bishkek all-year-around, for domestic visitors and trip extensions of foreign tourists

Planning concept of the region of



- 40-60 km **short trips for 1-day activities**, all-year-round
- **Complementary** to business and city-break, to extend length of stay

Require

- improving the quality and comfort of travels, **diversifying the touristic offer** and promotion of the region;
- **Connection** between the assets

Key actions

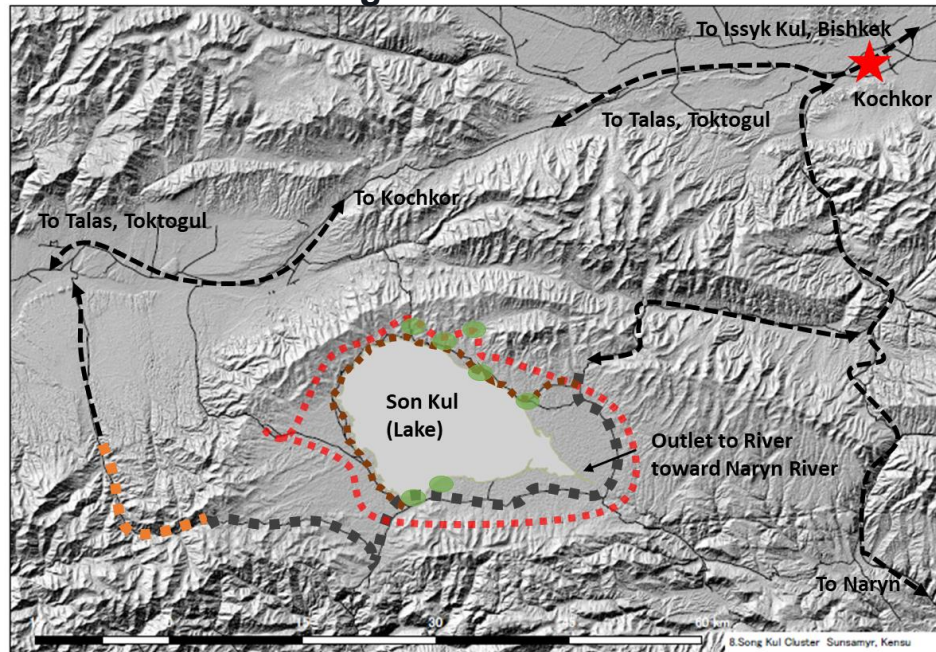
- Creating a **hillside trail linking all tourist spots** amongst themselves;
- Developing **walking and cycle paths network** for accessibility to interest points with alternative to car;
- **Basic facilities** (toilets, rest areas & tourist information) at each entrance of secondary trail;
- **Revitalizing the Chuy river** and exploring the recreational use of it (rafting, canoeing, ...);
- Diversifying the activities proposed in the area to enlarge the tourist market (paragliding, hard-adventure activities...).

Bishkek area: connecting the existing assets to maximize its use all-year-round



Song-Kul Cluster: concept of pristine and untouched nature

Song-Kul cluster



LEGEND

Major Tourism City	★
Major Yurt Camp Areas	●
Section Required Serious Repair / Maintenance	▬▬▬
Son Kul Flat Area	▬▬▬
Major Tourism Flow	← - - →
Highway (with Road Bed) inside Son Kul Basin	▬▬▬
Lake Side Trekking / Hiking Road	▬▬▬

- Set eco-friendly toilet system, garbage collection and treatment, and sewage facilities;
- Maintenance and **improvement of land usage control** for better sustainability;
- Promotion through tourist information centers (environment protection actions and regulations);
- Prohibit the open air mining in Kara-Keche (allow tunnel based only with high environmental standards).

- Develop and promote a **unique and pristine untouched natural experience**;

Require

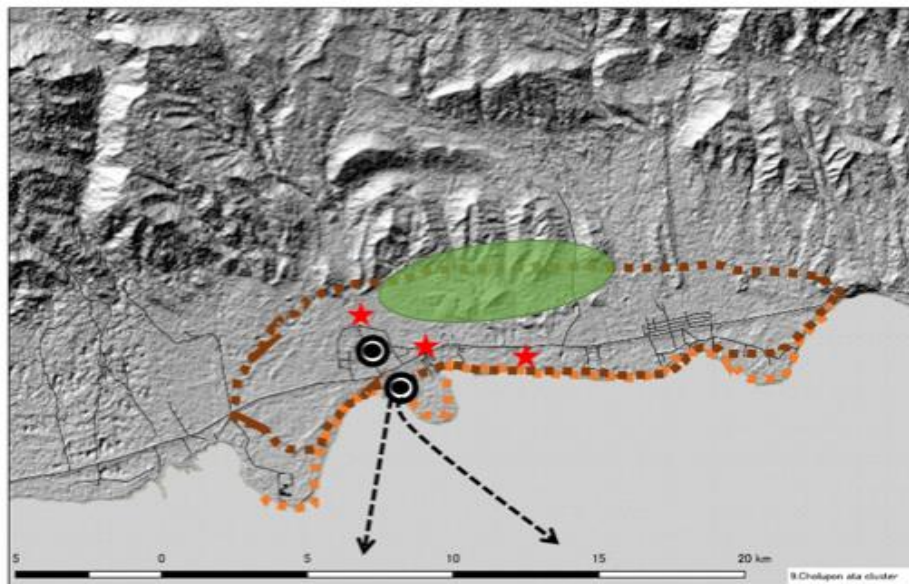
- High protection of the lake shoreland
- **Enforcement of environmental protection in the surroundings**

Key actions

- Introduction of **nature-friendly pavement for lakeside road**, and **limitation of vehicle passages**;

Cholpon-Ata cluster: Sun, Beach, Recreational, soft adventure, and health tourism

Resort cluster



LEGEND

Major Tourist Spot



Transport Terminal



Walking/Bike Trail



Development District Area



Land Side Coastal Resort



- Improving the quality, diversity and complementarity of the supply;

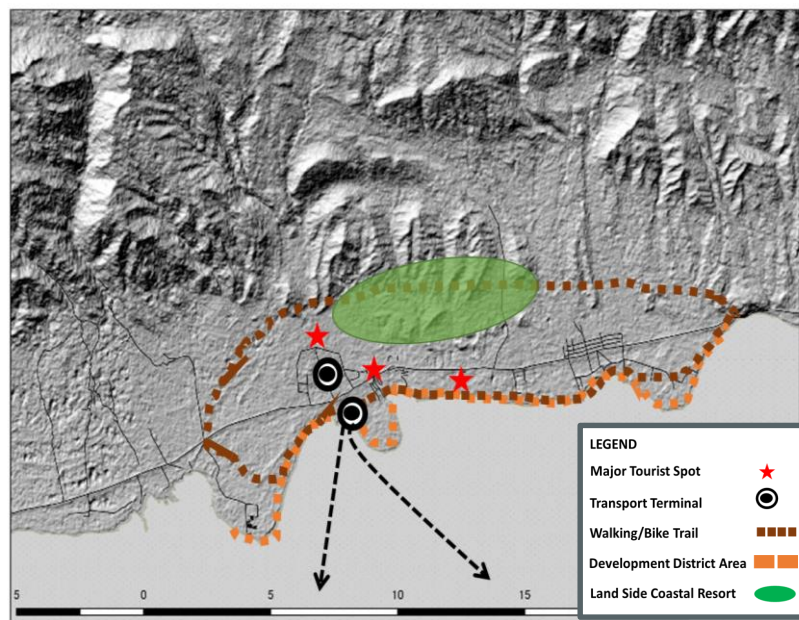
Require

- **Urban development planning priority** must be the quality of infrastructure and the natural and landscape protection;
- **Existing laws must be enforced** in the lakeside shore

Key
actions

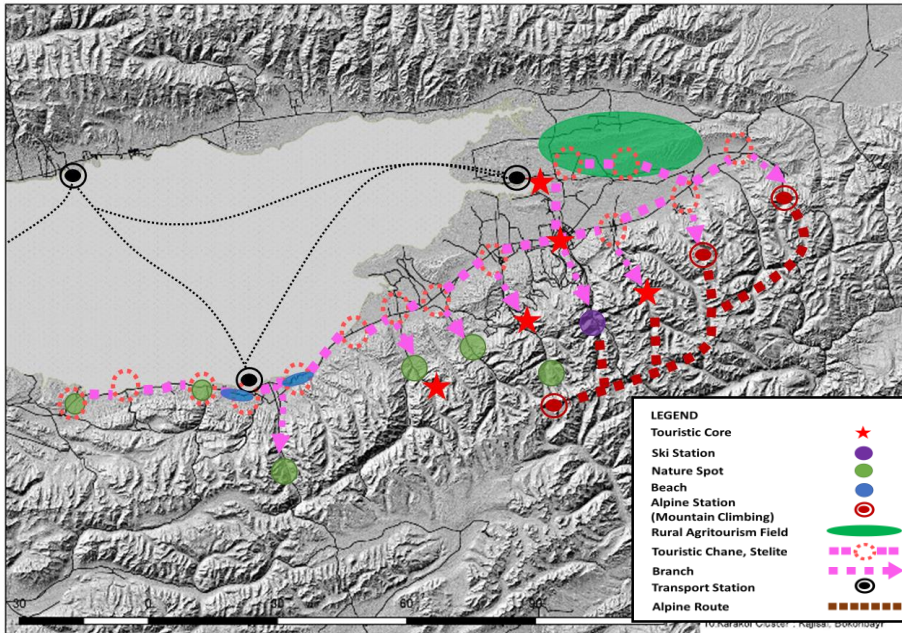
- Developing walking and cycle paths' network to connect all tourist attractions
- Limiting the development of the coastal area to create an open bank;
- Open public access to beaches and coastal area;
- Use the airport and the harbor as gateways;
- Developing an eco-resort in the inland region to maximize the value of the lake view;
- Integrating and valorizing landscape and heritage.

Cholpon-Ata cluster: Sun, Beach, recreational, soft adventure, and health tourism



Karakol cluster: Focus on adventure, sports, nature, culture, health and wellness

Networking of the Karakol cluster



- Improving the quality, diversity and complementarity of the supply;
- Improving accessibility
- Improving sustainability

Require

- Regional planning must link all points of interest and assets, by creating a touristic chain with efficient spatial distribution of the tourism products
- Improved accessibility by road and improved border crossing procedures are urgent;
- Karakol airport must be protected for a future option

Key actions

- Creating a road and walking and cycling trail network to link all tourist attractions with each other and different user groups, with support facilities, such as toilets, rest areas or tourist centers, every 15 km along the length of paths;
- Implementing transport stations that link both shores of Issyk-Kul and public transportation services;
- Implementing an Alpine Route with different entry points to create an interconnected mountain path network;
- Developing the agro-tourism sector in the region;
- Maintaining waterfront view corridors and its public access;
- Reduce travel time from Bishkek and Almaty;
- Landbank the Karakol airport area for future development option

Karakol cluster: Focus on adventure, sports, nature, culture, health and wellness

Tourist facilities along national roads



Water bus



Mountain roads with appropriate drainage



Interpretive natural trails



Hotel & Spa in mineral hotsprings



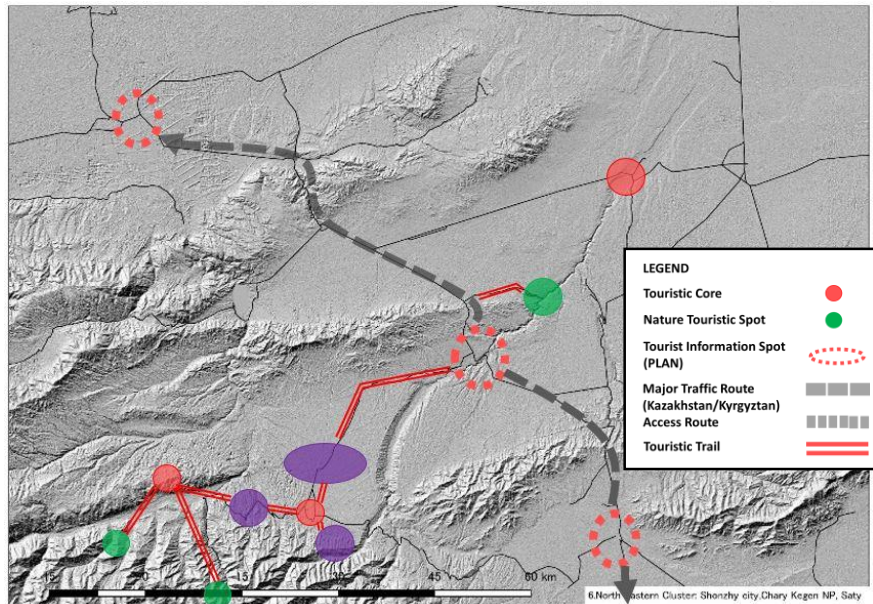
All-year-round ski resorts



All-year-round activities



East Kazakhstan cluster: Focus on adventure, sports, nature, culture, health and wellness



- Improving the quality, diversity and complementarity of the supply;
- Improving accessibility
- Improving sustainability

Require

- Regional planning must link all points of interest and assets, by creating a touristic chain with efficient spatial distribution of the tourism products
- Improved accessibility by road and improved border crossing procedures are urgent.

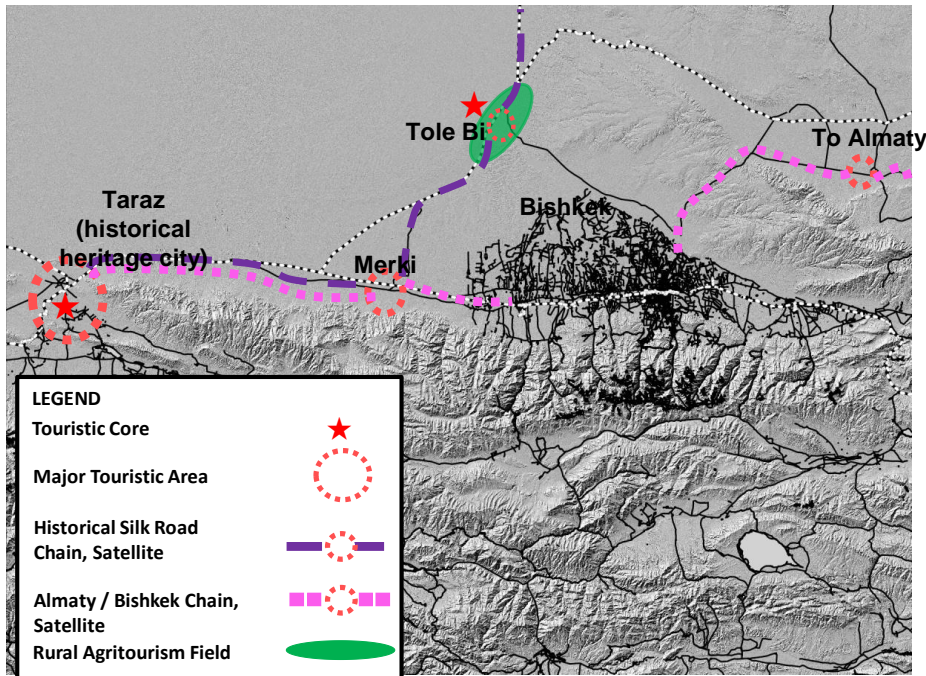
Key actions

- Creating tourism destinations from a central gateway;
- Promoting the region by creating a network of multifunctional facilities that provide free parking spaces, toilets and regional and tourist information (cf. figure 6.3.3);
- Developing new tourism products and new activities such as golf, Nordic skiing or horse riding;
- Linking tourist attractions by developing walking and cycle paths network;
- Enhancing the accessibility of touristic spots by improving road conditions and infrastructure.

East Kazakhstan cluster: Focus on adventure, sports, nature, culture, health and wellness



Jambyl cluster: Focus on culture



- Improving the state and the condition of the assets;
- Improving accessibility and connectivity
- Improving sustainability and complementary services

Require

- to structurise historical heritages in the area for the Heritage-based tourism purpose. This structurizing includes follows;
 - ✓ Historical and cultural heritage;
 - ✓ Ancient Taraz, which is UNESCO World Heritage Site;

Key actions

- Reformulation of the linkage between the Historical, the New Silk road and the proposed bypasses through the following programs.
 - ✓ Networking of confluence of two Silk roads and bypass with connecting facilities. The information center, roadside service facilities and heritage spots will be utilized for the network;
 - ✓ Local villages along the historical road can be integrated for the touristic network. Their productive activities (e.g. agriculture, rural product) can be utilized for touristic activities.

Jambyl cluster: Focus on culture



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