

Analysis of Cooperation in the Tourism Sector between Uzbekistan and Kyrgyzstan: a Study of Cross-border Value Chains

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Kyrgyzstan



KYRGYZSTAN

- In 2016 tourism occupied 4.6% of the GDP, 3.7% of the total employment (Institute of Public Policy and Administration, the University of Central Asia)
- Liberal visa regime for citizens of 45 countries

E.g. Uzbek citizens can enter Kyrgyzstan visa-free for up to 60 days.

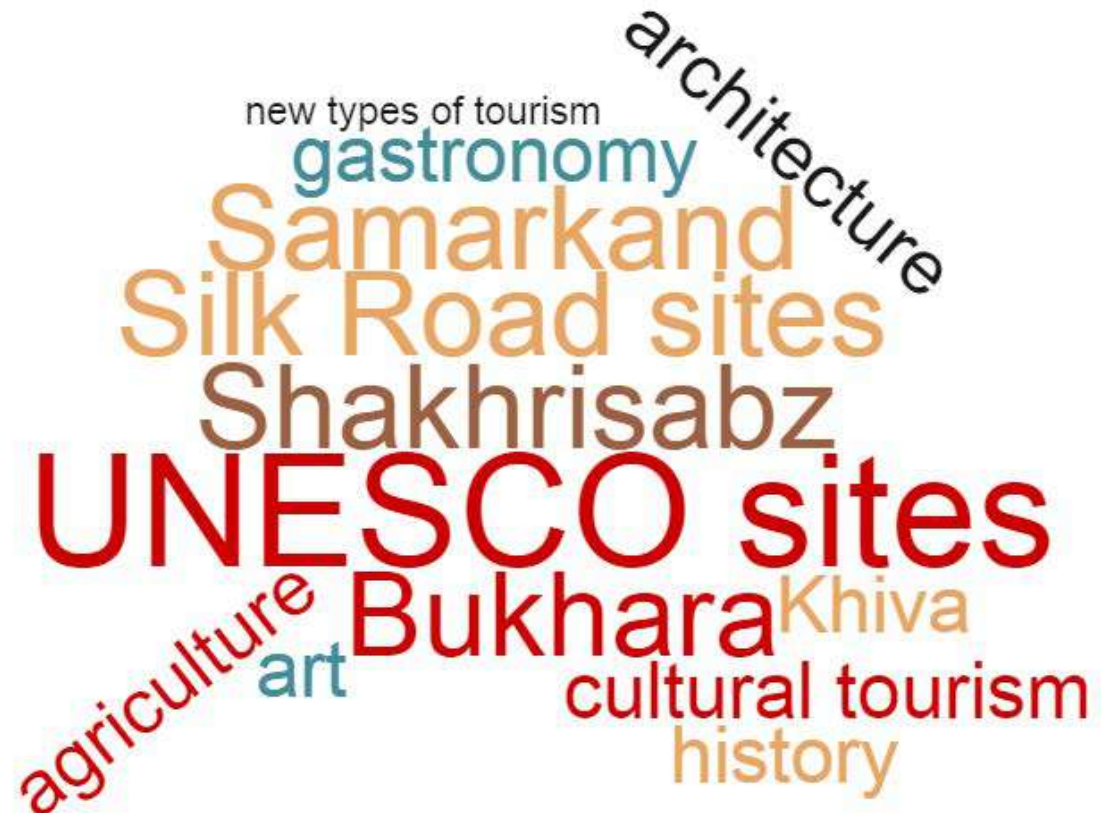


A word cloud of tourism-related terms in Kyrgyzstan. The words are arranged in a cluster, with 'adventure tourism' and 'mountains' being the largest and most prominent. Other words include 'hiking', 'trekking', 'nature', 'eco-tourism', 'Nomad's games', 'Silk Road', 'landscapes', 'Issyk-Kul', 'skiing', 'Karakol', and 'lakes'. The words are in various colors (blue, orange, red, brown) and orientations.

eco-tourism
Nomad's games
Silk Road
landscapes
hiking
Issyk-Kul
skiing
adventure tourism
mountains
Karakol
trekking
lakes
nature



- Major tourism reforms in 2016 - 2019:
 - e-visa and full/time-bound visa free regimes for over 85 countries (2nd most liberal regime in the CIS)
 - E.g. Kyrgyz citizens were granted a visa free regime for up to 60 days (*Ministry of Foreign Affairs of Uzbekistan*)
 - Other steps:
 - destinations promotion;
 - extending the range of tourist products;
 - cooperation agreements;
 - free exchange of foreign currency;
 - planned transport connectivity reform;
 - revision of tourism laws.

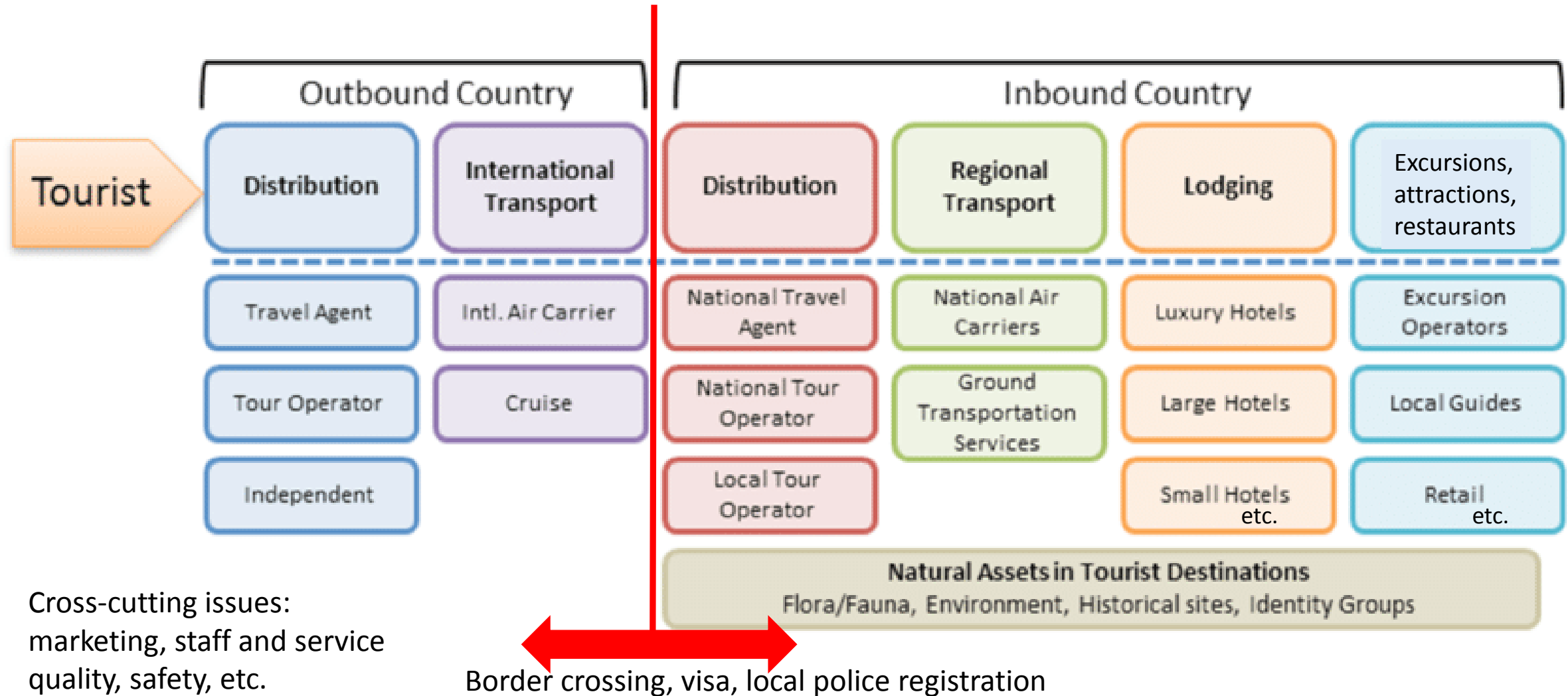


How can building enhanced regional value chains deliver a better cross-border tourism experience **between Uzbekistan and Kyrgyzstan?**

- In what ways do the current cross-border value chains operate in the tourism sector of Uzbekistan and Kyrgyzstan?
- What are the current success factors contributing to effective cross-border value chains for delivering a better tourism experience?
- What are the main bottlenecks for cross-border value chains in delivering a better tourism experience between Uzbekistan and Kyrgyzstan?
- What policies and practices are needed to boost cross-border tourism value chains for a better tourism experience?

- ✓ Qualitative study
- ✓ Purposeful sampling
- ✓ Key informant interviews in Uzbekistan and Kyrgyzstan:
 - **State and local authorities**
 - **Businesses:**
 - Service providers: accommodation, transport, restaurants, attraction operators, guides, event-companies
 - Intermediaries in the tourism sector: tour operators and tour agents
 - Tourism-focused associations
 - **Uzbek, Kyrgyz and International tourists**
- ✓ Geography of data collection:
 - Uzbekistan: Tashkent city, Ferghana, Andijan, Bukhara and Samarkand regions
 - Kyrgyzstan: Bishkek, Jalal-Abad region, Osh region, Issyk-Kul

Tourism Value Chain



Resuming the charter flight “Tashkent-Tamchy” (Issyk-Kul) for the summer tourist season from June 27 to September 6, 2019. Operated by INSPIRO Travel (Kyrgyzstan), Asia Lux Travel (Uzbekistan) and UzAirways.



Uzbek – Kyrgyz border “Dustlik”, Andijan region, Ferghana Valley, Uzbekistan
Kyrgyz – Uzbek border “Dostuk”, Osh region, Kyrgyzstan (Source: Internet)





Uzbek – Kazakh border “Gisht-Kuprik”, Tashkent region, Uzbekistan
Kazakh – Uzbek border “Jibek-Joli”, South-Kazakhstan region, Saragach, Kazakhstan (Source: Internet)

- Upgrade of border posts and regulations
- The hurdle of a local passport registration
- Irregularities in visa regimes – the Silk Visa negotiations;
- Transport deficiencies
- A unified system of booking
- Joint Silk Road marketing and combined tour packaging
- Empowering businesses for tourism policy recommendation (e.g. initiative on registration cancellation in Kyrgyzstan);
- Specialization, training and development for staff, knowledge exchanges;

- Data collection to be completed in September 2019 – peak and end of touristic seasons in the target areas.
- Research presentation at the 5th Annual Conference “Life in Kyrgyzstan” in Bishkek on October 23-24, 2019
- Final Policy Paper and Policy Brief by October 30, 2019.

Recommendations for further research:

- Detailed marketing research on tourism subsectors.
- Further research on transport connectivity of different parts of the region.
- Quantitative research on impact of policy measures on tourism volumes.
- Other large-scale cross-country quantitative studies.
- Exploration of environmental, economic and socio-cultural impacts of tourism between the considered countries and beyond.
- Case studies and success stories of tourism companies.

Thank you!

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