



CAREC Visa Facilitation Study: Preliminary Findings

**CAREC Tourism Working Group Meeting
Capacity Building Workshop
Istanbul, 26 June 2024**



Brendan Sobie
Independent Consultant
CAREC Aviation and Tourism



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

Missions to Kazakhstan, Uzbekistan, Tajikistan, and Kyrgyz Republic were recently completed to interview relevant stakeholders, assess the challenges and opportunities for tourism visa streamlining and identify other potential initiatives to facilitate multi-country itineraries

Preliminary Findings: Silk Road Visa

Stakeholders in the four countries that were initially targeted for the Silk Road Visa pilot program uniformly indicated this is no longer needed given their current visa free programs

The idea of a Silk Road Visa initially emerged several years ago when visa free programs in Central Asian countries were limited; visa free lists have since expanded significantly, essentially making the concept of a single visa for the four countries (similar to the Schengen visa) moot

	Visa-Free Countries	e-Visa countries
Uzbekistan	93	57
Kazakhstan	83	109
Kyrgyz Republic	80	ALL
Tajikistan	77	140

Source: Interviews with stakeholders

Note: Visa on arrival is also available for some e-Visa countries

The number of visa-free countries has increased recently and there are plans to further expand the list of visa-free countries; for example, to 100 countries for Kazakhstan



Current State of Play



CAREC countries ranked by Tourism Visa Openness (% of world's population under no visa, visa on arrival and e-Visa programs)

CAREC now has a higher overall visa openness index than the global average despite very low scores from Mongolia, PRC and Turkmenistan

These figures are somewhat misleading as they are outdated and based on the population of each country included under visa free or e-Visa lists rather than how big or important they are as a source market

Visa on arrival is common in Central Asia but not reflected as it is offered for select e-Visa countries

<i>Country</i>	<i>No Visa</i>	<i>Visa on Arrival</i>	<i>e-Visa</i>	<i>Traditional Visa</i>	<i>Openness index</i>
Kazakhstan	46%	0%	45%	9%	68.66
Kyrgyz Republic	28%	0%	72%	0%	63.90
Uzbekistan	45%	0%	36%	19%	63.26
Georgia	30%	0%	51%	19%	55.65
Tajikistan	26%	0%	54%	19%	53.47
Pakistan	0%	45%	33%	22%	48.17
Azerbaijan	5%	26%	45%	24%	45.75
Mongolia	18%	0%	0%	82%	17.75
PRC	1%	0%	0%	99%	0.64
Turkmenistan	0%	0%	0%	100%	0
KAZ/KYR/UZB/TAJ	36%	0%	52%	12%	62
CAREC average	20%	7%	34%	29%	42
Global average	47%	18%	14%	21%	40

Note: Afghanistan excluded

Source: UNWTO Tourism Visa Openness Report 2023 (published March 2024)

Travelling to all Central Asian countries is possible!

A small group of Chinese tourists drove China-registered SUVs across Kazakhstan, Kyrgyz Republic, Uzbekistan, Tajikistan and Turkmenistan over 29 days in May/June 2024

A Chengdu-based travel agency specializing in car tours organizes these trips regularly with cooperation from travel companies in the five countries



Pamir Highway
Tajikistan, June 2024

Preliminary Recommendations: Visas



- 1) Synchronization of Visa Free and e-Visa Lists
- 2) Improvement to e-Visa websites and processes
- 3) Alignment of Visa Free Length of Stay and Other Conditions
- 4) Clear and Joint Communication of Visa Requirements
- 5) Potential Joint Digital Nomad Visa
- 6) Potential Joint Second Home Visa

While the idea of a joint Silk Road tourist visa is now moot there is still a lot countries can do jointly to align their visa policies to facilitate Silk Road travel

However, synchronization of lists and other joint visas such as digital nomad will not be easy to implement; foreign affairs ministries warn alignment of policies and joint visas are difficult as they all have their own security assessments

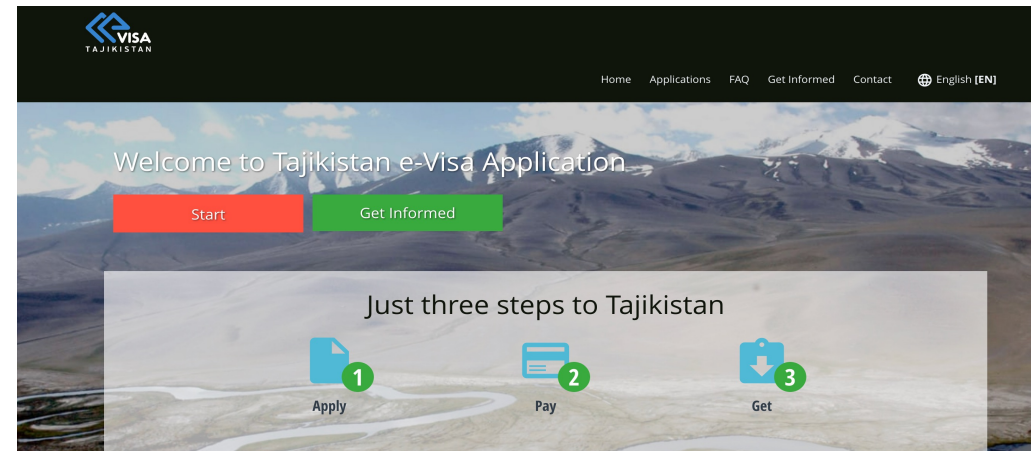
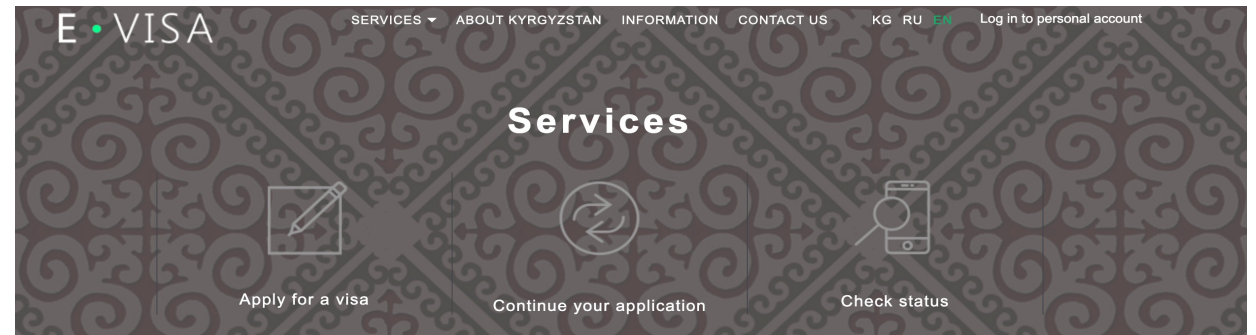
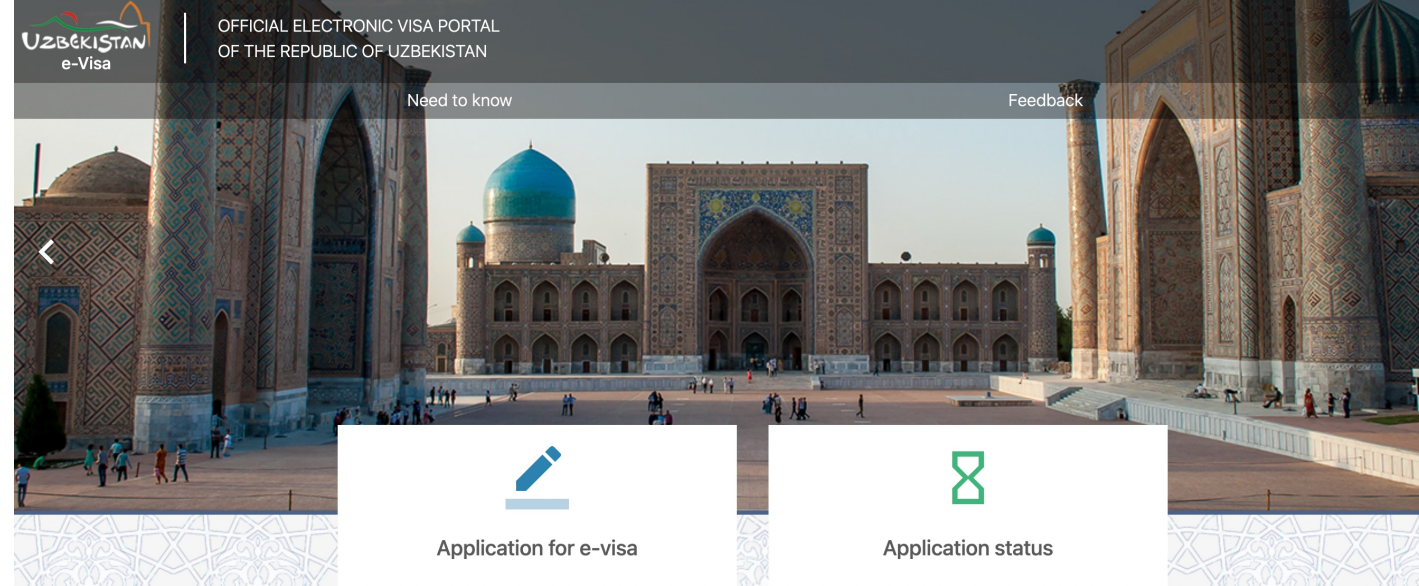
e-Visa websites

Central Asian tourism players say visitors find the e-Visa websites difficult to use

Website security warnings scare away some visitors

Processing times are not always that short

e-Visa requirements and list of e-Visa countries vary; the list of visa-free countries also vary although the total numbers are similar



The Need for Better Communication



Some of the visa policies are messy and not communicated well

Uzbekistan and Kyrgyz Republic only allow visa-free entry for certain nationalities if you are at least 55 years old

Kyrgyz Republic has an unusual visa-free entry option for Chinese and Indian citizens that are invited by two Bishkek casinos and pre-purchase vouchers

Uzbekistan allows visa-free entry for certain nationalities not on their visa-free list if you stay less than five days and if you are in transit (fly to a different destination than where you arrived from)

Streamlining and better communicating visa policies and requirements, potentially using the VistSilkRoad portal, would facilitate multi-country itineraries

Digital Nomad Visa



Several CAREC countries are now looking at introducing digital nomad visas

Globally, over 50 countries have now introduced this visa with many more countries across all regions now looking at the concept (source: UNWTO)

Digital nomad visas can be an innovative way to attract and retain high skilled workers, but digital nomads are not always categorized as tourists and CAREC tourism stakeholders have mixed views on whether this visa is worthwhile

CAREC could provide a platform for several countries to introduce the visa simultaneously with the same requirements, enabling digital nomads to secure the visa for more than one country

Having the ability to work from two neighboring countries in a year could be particularly appealing given that often digital nomads cannot stay in a single country more than 183 days in a year while maintaining tax free status

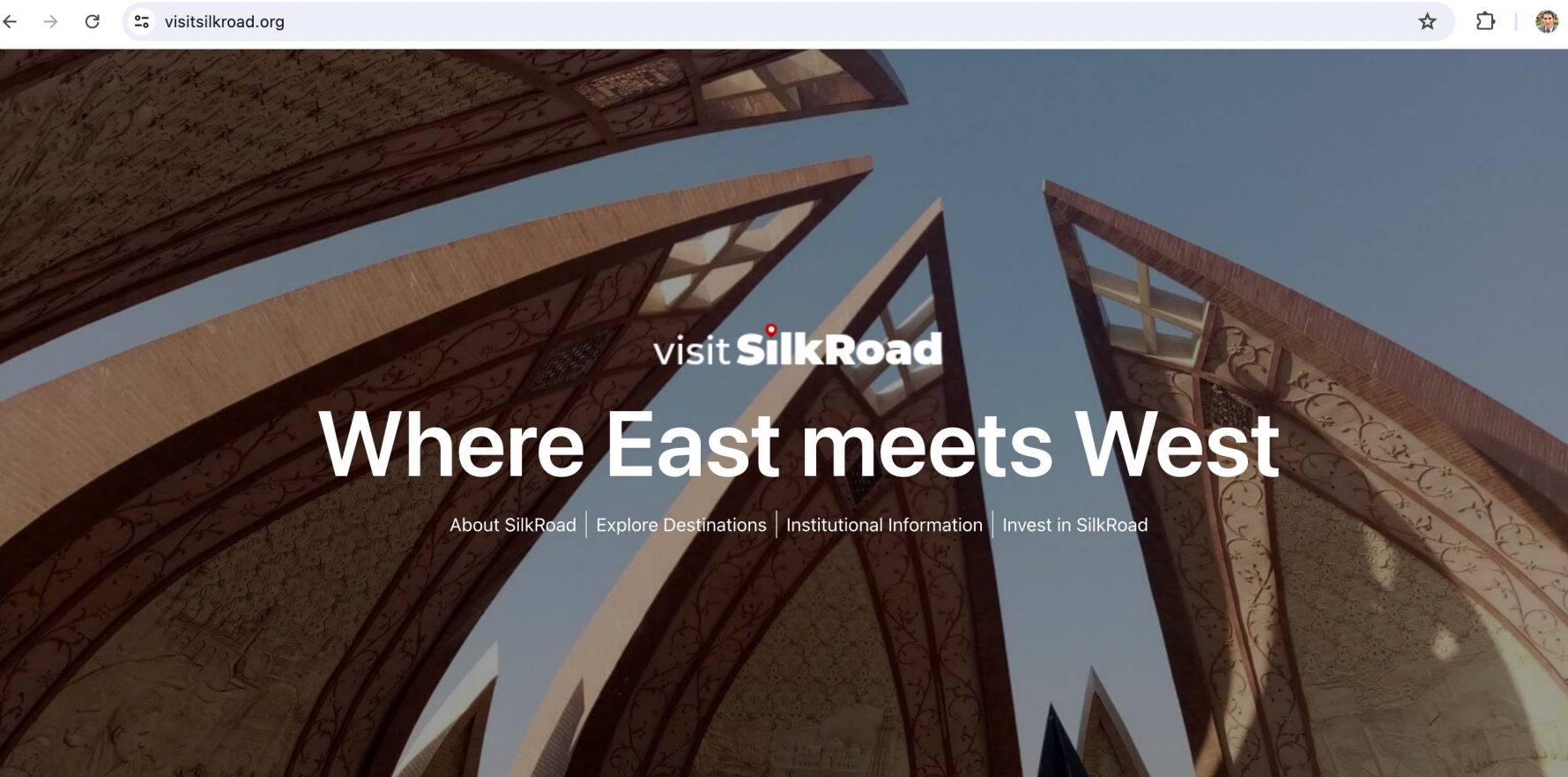
Preliminary Recommendations: Marketing of Multi-Country Itineraries



1. Joint marketing of Central Asia as single destination
2. Joint website promoting multi-country Silk Road travel
3. Joint promotion of intra-CAREC travel

The VisitSilkRoad portal was launched late last year but it seems to be static (no regular updates) and lacks a marketing strategy (no one seems to know about it)

The portal could be used to provide updated visa-free, visa on arrival and e-Visa lists (with links to e-Visa sites); the status of border crossings; and information on current routes/airlines connecting CAREC countries



Joint marketing and exhibiting is possible!

The five Central Asian countries had a joint exhibit last year at Tourism EXPO Japan

There will not be a joint exhibit this year despite JICA funding being available after two of the countries decided to instead have their own exhibits

Unfortunately, this is one of many examples of one step forward/one step back in efforts to promote collaboration



Tourism EXPO Japan, October 2023

Preliminary Recommendations: Connectivity



1. Improving border crossings
2. Improving air connectivity between Silk Road countries
3. Expeditions to assess infrastructure of multi-country Silk Road tourist routes



ПАСПОРТТЫҚ БАҚЫЛАУ ПАСПОРТНЫЙ КОНТРОЛЬ PASSPORT CONTROL

Border crossings in CAREC are often not tourist friendly and congested with a lack of signs and services/amenities (no aircon, no toilets, no drinking water etc.)

Green lanes for tour buses, staff training and better services are needed; this has been talked about for years and there are now some plans, but progress is very slow

Intra-CAREC air connectivity



This summer there are 35 regional international routes within CAREC (excluding PRC) compared to 27 in 2019

But only 9 of these routes are served with at least one daily flight and only 12 have at least 4 weekly frequencies

The intra-CAREC market is still quite small, accounting for only about 4% of total international seat capacity

Some of smaller routes and the airlines that operate them are relatively unknown outside of CAREC (for example, Hunnu Air's Almaty-Ulaanbaatar service)

There are massive opportunities, particularly for low-cost carriers, to stimulate growth in this market, as highlighted by the CAREC Aviation study published last year, but there are also numerous obstacles

Top Intra-CAREC routes: 2024 vs 2019

ROUTE	SUMMER 2024 FREQUENCY	SUMMER 2019 FREQUENCY
Baku-Tbilisi	37 per week	16 per week
Almaty-Tashkent	27 per week	20 per week
Astana-Tashkent	11 per week	12 per week
Aktau-Baku	9 per week	7 per week
Almaty-Bishkek	8 per week	10 per week
Baku-Tashkent	8 per week	5 per week
Almaty-Dushanbe	7 per week	8 per week
Bishkek-Tashkent	7 per week	4 per week
Dushanbe-Tashkent	7 per week	3 per week
Almaty-Baku	6 per week	5 per week
Almaty-Tbilisi	6 per week	7 per week
Tashkent-Tbilisi	5 per week	1 per week

CAREC air connectivity



CAREC (excluding PRC) international seat capacity growth by market: 2024 vs 2019

Main markets	Summer 2024
CAREC-Türkiye	+71%
CAREC-CAREC	+59%
CAREC-Russian Federation	+39%
CAREC-GCC*	+35%
CAREC-PRC	+26%
CAREC-Europe (excluding Türkiye)	+22%
Smaller markets	Summer 2024
CAREC-India	+169%
CAREC-Southeast Asia	+89%
CAREC-Korea	+43%
CAREC-Africa	+30%

Overall international seat capacity from CAREC this summer (end March to end October based on the IATA summer schedule season) is about 36% above 2019 levels

Globally capacity is only up 2% this summer

Regional capacity within CAREC is up 59% but on a low base; there are more flights to Russia and Türkiye than regionally

CAREC needs more diverse networks to attract tourism, but the most critical need is to improve regional connectivity which would help facilitate multi-country Silk Road itineraries, particularly given the current condition of land border crossings

Preliminary Recommendations: Others



- 1. Developing Pakistan as a source market**
- 2. Developing China and India as source Markets**
- 3. Implementing standards for certification**
- 4. Implementing standards for tourism data**

Pakistani citizens still need visas to travel to other CAREC countries (e-visas for a few countries); CAREC countries could consider a joint visa for Pakistan to facilitate intra-CAREC travel

Some Central Asian countries have now introduced visa free policies for Chinese and Indian citizens, resulting in a significant increase in tourists, but the policies vary; it is important to adopt entirely visa free policies for these growth markets

CAREC countries could consider introducing common standards for tour guide and tour company certification, particularly as cross-border itineraries become more common

Currently visitor data is not following global standards, making it difficult to analyze trends (including growth in multi-country Silk Road itineraries) and resulting in over-counting

China and India growth

Growth in weekly flights to China and India: 2024 vs 2019

	June 2024	June 2019
Kazakhstan-China	46	31
Kazakhstan-India	17	4
Uzbekistan-China	42	8
Uzbekistan-India	14	10
Kyrgyz Republic-China	7	6
Kyrgyz Republic-India	2	0
Tajikistan-China	6	4
Tajikistan India	1	0

Source: OAG

Kazakhstan expects 500,000 visitors from China and 200,000 from India in 2024, compared to 367,000 and about 100,000 in 2023; reciprocal visa free travel with China began last year and India became visa free in 2022

Uzbekistan is targeting 1 million visitors from China this year compared to only about 50,000 in 2023; it now has China on its visa-free list (but no reciprocity yet) and still requires e-Visas for India

Kyrgyz Republic and Tajikistan still require e-Visas for China and India (with some exceptions) – not surprisingly they have not experienced the growth in visitors or flights that Kazakhstan and Uzbekistan has

Implementation is key

Many of the recommendations discussed in this presentation and this workshop are not new; they have been made multiple times over the last several years

Stakeholders expressed a desire to focus more on implementation and organize “on foot” expeditions to see firsthand the the state of infrastructure and other challenges

Stakeholders believe there are too many studies and events; they also pointed out a need to coordinate better with other organizations that have tourism working groups such as SCO



Lake Timur-Dara, Tajikistan

Thank you!

Brendan Sobie
Independent Aviation Analyst and Consultant
CAREC Aviation and Tourism
Email: brendan@sobieaviation.com

