

CAREC TOURISM WORKING GROUP · 9–10 SEPTEMBER 2026

Tourism in the Almaty–Bishkek Economic Corridor

Kristian Rosbach
Senior Regional Cooperation Specialist
Asian Development Bank



What is ABEC?

CAREC economic corridors are about making neighbouring cities and regions function as a single market. ABEC is CAREC's first pilot: launched in 2014 by Kazakhstan and the Kyrgyz Republic with ADB support, linking two regional hubs. Tourism is one of five workstreams, alongside connectivity, agribusiness, environment, and health.

ABEC is implemented by the ABEC Subcommittee, chaired by the CAREC National Focal Points, and overseen by the Kazakh-Kyrgyz Intergovernmental Council, which is headed by both countries' prime ministers.

Why supporting tourism under ABEC?

Creating one tourism destination market makes both countries more attractive as a destination. Linking winter sports on the mountain range with summer tourism around Issyk-Kul reduces seasonality and hence reduces investment risks. Year-round flows change the business case for ski resorts, hotels and the roads serving them.



Issyk-Kul in summer, and the Tian Shan range that links the two countries' ski potential.

ABEC Tourism Master Plan

2019: the first edition

- Framework for one common tourism area across the two countries: vision, ownership, land use, hard and soft infrastructure.
- Twelve clusters mapped — two city, two suburban, three natural, two resort and three ski clusters.
- Priorities: ski development on the Almaty–Issyk-Kul range, an air hub at Almaty, shorter travel times to Issyk-Kul.



2026: the green update

- Green tourism: eco-routes, sustainable accommodation, hiking and cycling trails, less pressure on lakes and national parks.
- Sustainable development: resource efficiency, renewables, green logistics, lower carbon footprint.
- Regional integration: digitalised border crossing, sustainable transport, better cross-border routes.

What changed between editions. The first plan set direction but did not move money. The working group asked for the update to be finalised with a focus on practical implementation, applicability at the level of government bodies, and a priority investment portfolio of five to seven projects by the end of 2026.

A joint accommodation classification system

One rulebook covering every accommodation type on both sides of the border — hotels on the Hotelstars scale, and guest houses, hostels, campsites and yurt camps on categories adapted to local conditions.



Hotels



Guest houses



Hostels, campsites, yurts

Dec 2024

Memorandum of understanding signed to implement the system in both countries

Mar 2025

System formally endorsed by parliament in the Kyrgyz Republic

Dec 2025

First training for classification experts held in Bishkek — 17 trainees

Jun 2026

Advisory Council convenes for the first time; agreements signed by both tourism agency heads

Where each country stands

- Kyrgyz Republic: approved and in implementation.
- Kazakhstan: adapting the system to national arrangements.
- Both: aligning approaches so the two systems stay compatible.

The institutional setup

The Advisory Council exists because paragraph 4.2 of the 13th Intergovernmental Council decision required it. Its regulations are set by memorandum; it meets at least once a year; and it tracks the share of classified accommodation in both countries.

Skills and professional standards



8,500

trained tourism professionals missing each year across the corridor

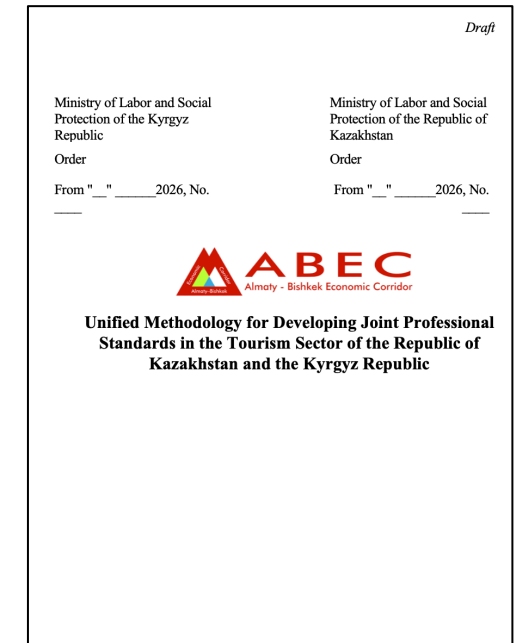
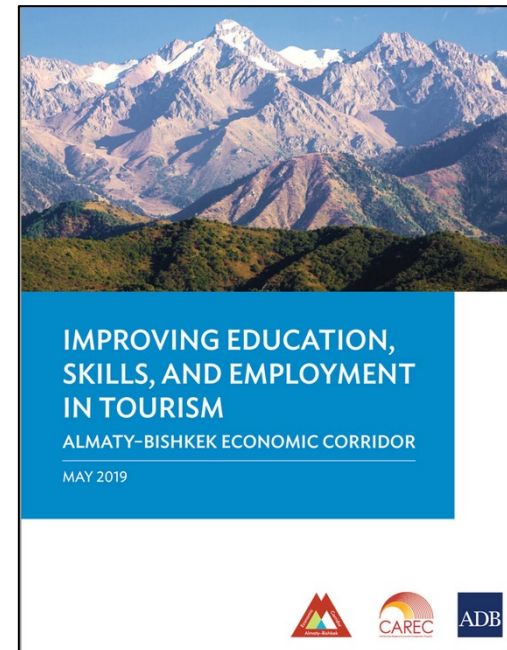
\$30m+

estimated opportunity cost of that gap, every year



What was done about it

- A skills gap analysis quantified the shortage and its cost
- A business and institutional plan for an Almaty Tourism Skilling Center, for up to 600 students a year under the International University of Tourism and Hospitality.
- Joint professional standards for tourism occupations developed, with phased application within ABEC targeted by end 2026.



From planning to investment



\$56 million

Issyk-Kul Environmental Management and Sustainable Tourism, approved 2024: climate-resilient wastewater, a museum, a tourism information centre, bike and walking trails, parks and waste collection.



40%

shorter travel time promised by the Almaty–Issyk-Kul alternative road. Today the trip runs via Bishkek — over 460 km and roughly eight hours to Cholpon-Ata. Capital cost is estimated at \$80–120 million, toll-financed.



\$30.7 million

ABEC Regional Improvement of Border Services, approved 2025, rebuilding the Karkyra, Kichi-Kapka and Ak-Tilek crossings, which will also benefit tourism.

And a pipeline behind them: a pre-feasibility study and development strategy for the Turgun mountain resort, five public–private tourism projects identified in the Kyrgyz Republic, and an Almaty–Bishkek electric bus service in preparation.



Four learnings from a decade of ABEC tourism work

1

Bilateral institutional setup is key

The Intergovernmental Council at prime minister level ensured political will for the reforms and projects, despite frequent changes of vice/deputy ministers.

2

Asymmetric momentum

One country legislated the classification system while the other was still adapting it. Compatibility, not uniformity, was the workable target.

3

Regional cooperation based on trust

The tourism working group met frequently to develop trust and appreciate that both countries benefit from cooperation.

4

Focus on projects

The conceptualization of regional projects helps parties work together towards a common goal.

Implications for CAREC tourism cooperation

1

Accommodation Classification could become a regional deliverable

The joint system was built from a review of both national systems and international practice, with criteria adapted to local conditions. A CAREC-wide version, or mutual recognition between national systems, would extend work already tested between two members, including a web platform.

2

ABEC as a pilot for new reforms

ABEC's can implement new ideas and international best practice that can be rolled out in the wider CAREC region.

3

Economic Corridor Development is a great vehicle for tourism development

The multi-sector approach of spatial economic corridors, its institutional high-level setup, and the integrated planning helps develop and implement tourism reforms in addition to the greater market, economies of scale and scope.

ANNEX

Supporting detail



Twelve years of ABEC tourism cooperation

2014	ABEC launched; first joint working group meeting on the corridor initiative
2019	Tourism Master Plan published; second Tourism Working Group meeting in Bishkek; skills gap study; Georgia study tour
2020	Roundtable on tourism development and virtual meetings on Kyrgyz tourism project proposals; Almaty Skilling Center business plan; Almaty–Issyk-Kul road economic impact assessment
2021–22	Joint accommodation classification system report and COVID-19 health and safety protocols developed with UN Tourism; travel bubble approach presented; Turgen resort technical assistance
2023	Classification system introduced in Bishkek; ABEC joint classification report published
2024	Fourth Tourism Working Group meeting in Almaty; Issyk-Kul project approved; memorandum of understanding on the classification system signed in December; prime ministers mark ABEC's tenth anniversary
2025	Classification system endorsed by parliament in the Kyrgyz Republic in March; first training for 17 classification experts in December
2026	Green update of the master plan presented in February; Tourism Working Group and first Advisory Council meeting in June; agreements signed by both tourism agency heads



Who decides what in ABEC tourism

Intergovernmental Council

Bilateral, at prime-minister level. Its 13th meeting mandated the Advisory Council on the classification system — the political anchor for the tourism agenda.

ABEC Subcommittee

Created by the Intergovernmental Council in 2017 to steer the corridor across sectors; the tourism working group reports into it.

Joint Working Group on Tourism

Co-chaired by the State Agency for Tourism Development of the Kyrgyz Republic and the Tourism Industry Committee of Kazakhstan's Ministry of Tourism and Sports. Agrees a signed protocol at each meeting.

Advisory Council on the classification system

Composition and working format set by memorandum of understanding; meets at least annually; oversees implementation and alignment of the two national systems.

ADB

Analytical work, master planning, standards development and secretariat support through ABEC technical assistance and national coordinators in both countries.

What the ABEC tourism master plan green update proposes

Twelve clusters

- Two city clusters (Almaty, Bishkek) and two suburban clusters around them.
- Three natural-area clusters: Song-Kul, Balykchy–Karakol, Kolsay–Charyn/Chundja.
- Two resort clusters at Tamchy and Cholpon-Ata; three ski clusters at Almaty/Turgen, Bishkek and Karakol.

The four conditions the plan sets

- Develop an air hub at Almaty as the gateway for the whole region.
- Make both cities attractive for city-break visitors, using shopping as a complement.
- Cut travel time between the airport, Bishkek and Issyk-Kul.
- Restructure the institutional framework, with reforms enabling public–private partnership management.



The plan distinguishes investments that depend on reform from those deliverable under existing frameworks, and separates public, private and blended financing. Demand forecasts under several implementation scenarios support the priority list.



The tourism project pipeline

Five public–private projects identified in the Kyrgyz Republic

- A skiing and sport centre with spa at Issyk-Kul.
- Water transport and lakeside cruising on Issyk-Kul.
- A panorama hotel with golf course and yachting port.
- Concessional development of Song-Kul and its surroundings.
- A convention and fair centre in Bishkek.

Turgen mountain resort, Kazakhstan

- A priority destination in Kazakhstan's state tourism programme and in the ABEC master plan.
- ADB technical assistance of \$225,000 approved in April 2021.
- By April 2023 it had delivered a development strategy, a pre-feasibility study with financing options, and stronger government capacity to develop mountain resorts.

Almaty–Issyk-Kul alternative road

- Almaty and Issyk-Kul are about 80 km apart in a straight line, but the mountains force traffic through Bishkek — over 460 km and roughly eight hours to Cholpon-Ata. A more direct route would cut the distance to around 260 km.
- An economic impact assessment confirmed additional GDP growth in both countries. A memorandum on the route dates back to 2007; the project is now at feasibility study stage, which will be completed within the year. The road's main purpose is for tourism.