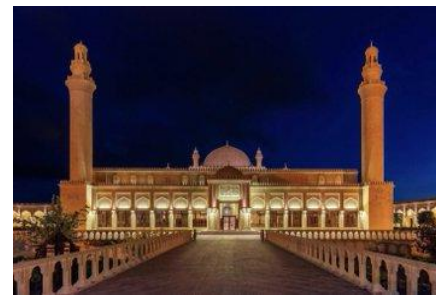


*STRATEGIC KEY AREAS
AND
DRAFT ECO REGIONAL ACTION PLAN FOR
SUSTAINABLE TOURISM DEVELOPMENT*



***STRATEGIC KEY AREAS
AND
DRAFT ECO REGIONAL ACTION
PLAN FOR SUSTAINABLE
TOURISM DEVELOPMENT***



**Economic Cooperation
Organization**

Executive Summary

Working towards the strategic objective of the ECO Vision 2025 in tourism sector in order to establish a peaceful and green tourism destination with diverse products and high quality services in the region, there is a need to make a more strategic approach to regionally address the main tourism development standards. This Draft ECO Regional Action Plan for Sustainable Tourism Development (Regional Action Plan) has been designed to address and achieve the higher regional tourism standards while emphasizing tourism sector as an important element of the regional development. The approach adopted in preparation of the Regional Action Plan is inductive, i.e. based on an assessment of current global and regional tourism trends, policy goals and sectoral development challenges and regional requirements through analysis of the regional tourism in terms of its strengths, weaknesses, opportunities and threats (SWOT). Based on the results of this approach, it has been concluded to follow and continue initiatives in the strategic areas of branding, marketing and promotion of the region, travel and tourism facilitation, diversification of tourism products and services, human resource development, increasing quality standards, digitalization, investment generation and, private sector and local community involvement in tourism activities.

The Regional Action Plan is organized around eight different sets of strategic key areas:

- i. Branding, marketing and promotion
- ii. Travel and Tourism Facilitation
- iii. Diversification of Tourism Products and Services
- iv. Human resource and capacity building for increase of the quality of the services
- v. Quality development and harmonization of rules and procedures for sustainability of the natural and cultural environment
- vi. Digitalization
- vii. Investment Generation and Facilitation
- viii. Private sector and local community involvement in tourism activities

Each of these strategic key areas has a series of actions and activities. There are recommendations for realigning and restructuring the way that the ECO tourism cooperation develops in order to achieve sustainable regional tourism development while making best use of available resources. It is hoped that this realignment will enable the regional ECO tourism to develop effectively by implementing the suggested regional tourism initiatives in the plan.

It is worth emphasizing that while the ECO Secretariat is devoted to achieve the regional tourism goals and objectives as indicated in this plan, it has limited resources and facilities compared to the vast resources of the Member States for promotion of their tourism products. Therefore, commitment and contribution of the Member States will substantially increase and facilitate the implementation of the action plan.

The strategic vision of the ECO Region in the area of Tourism as defined in the ECO Vision 2025 is *“to establish a peaceful and green tourism destination with diverse products and high quality services in the region.”*

The core strategic key areas of cooperation in regional tourism sector are defined as follows:

**Branding,
marketing and
promotion**

**Travel and Tourism
Facilitation**

**Diversification of
Tourism Products
and Services**

**Human resource
and capacity
building for
increase of the
quality of the
services**

**Quality development
and harmonization of
rules and procedures for
sustainability of the
natural and cultural
environment**

Digitalization

**Investment
Generation and
Facilitation**

**Private sector and
local community
involvement in
tourism activities**

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STRATEGIC KEY AREAS AND DRAFT ECO REGIONAL ACTION PLAN FOR SUSTAINABLE TOURISM DEVELOPMENT

1. INTRODUCTION

ECO Vision 2025 adopted in the 13th ECO Summit in 2017 at Islamabad, specified the Tourism industry as the priority development field for the coming decade. The strategic objective of the ECO Vision 2025 in tourism sector is to establish a peaceful and green tourism destination with diverse products and high quality services in the region. It is the intention of the ECO Member States to vigorously pursue success on this sectoral track going forward.

Tourism has an essential role in the integration of the economies of the ECO region and in the enhancement of their cultural and natural resources. With its huge potential, tourism can be a powerful tool for regional development, as it stimulates new economic activities and has a positive economic impact on employment and community development in reducing inequalities. With these objectives in mind, the Secretariat is committed to contributing to the growth of tourism and urging the Member States to take the necessary measures for promotion of ECO region as a considerable tourism destination.

1.1 MANDATE

Considering the vital role of tourism in the regional economy and its significant contribution to meet the sustainable development standards, an important step was taken towards increasing cooperation in the area of Tourism during the 3rd ECO Ministerial Meeting on Tourism, which was held on 3-4 October 2019 in Khujand, Republic of Tajikistan. The Khujand Declaration on tourism underlined the importance and the necessity of undertaking a Plan of Action to promote cooperation in the field of tourism among Member States through harmonized policies. Hence, to catalyze the potential of tourism and to develop a coherent regional policy approach, ECO Strategic Key Areas and ECO Regional Action Plan for Sustainable Tourism Development has been developed on the basis of ECO Vision 2025 and objectives as enshrined in Izmir Treaty. The directions contained in various declarations, resolutions and decisions adopted by various ECO meetings provide the necessary policy framework availed to develop the Strategic Key Areas and ECO Regional Action Plan for Sustainable Tourism Development. This document specifies the strategic key areas, general objectives, guidelines and the road map to pursue activities that would enhance joint regional cooperation among ECO Member States in tourism sector, which is also in accordance with the national priorities of the Member States.

2. GLOBAL TOURISM TRENDS AND IMPACTS OF COVID-19 PANDEMIC

In 2020, global tourism sector was faced with one of the most acute crisis suffering sizeable losses and setbacks when travel and mobility almost came

to a cessation due to COVID-19. As COVID-19 spread across the world, travel restrictions and border shutdowns were introduced in many countries and regions to curb its spread including the ECO region. Flights were cancelled, hotels closed down and travel restrictions were introduced. Aviation industry is one of the most dramatically affected sectors facing the deepest crisis ever in history due to drastic declines in air travel demands and stringent travel restrictions. The hotel industry is also among the hardest hit with the unprecedentedly low levels of occupancy rates due to declining demand for travel with the fear of health and safety concerns, lockdown measures and forced confinement.

According to WTTC, before the COVID-19 pandemic, tourism and travel had become one of the most important sectors in the global economy accounting for almost 10.3% of the global GDP and creating more than 330 million jobs across the world. During the past five years, one in four of all new jobs created across the world have been in Travel & Tourism. According to WTTC's latest annual research, the travel and tourism sector suffered a loss of almost US\$4.5 trillion to reach US\$4.7 trillion in 2020, with the contribution to GDP dropping by a staggering 49.1% compared to 2019; relative to a 3.7% GDP decline of the global economy in 2020. In 2019, the travel and tourism sector contributed 10.4% to global GDP; a share which decreased to 5.5% in 2020 due to ongoing restrictions to mobility. In 2020, 62 million jobs were lost, representing a drop of 18.5%, leaving just 272 million employed across the sector globally, compared to 334 million in 2019. The threat of job losses persists as many jobs are currently supported by government retention schemes and reduced hours, which without a full recovery of travel & tourism could be lost. Domestic visitor spending also decreased by 45%, while international visitor spending declined by an unprecedented 69.4%.

Prior to the corona virus outbreak, the global tourism sector had seen almost uninterrupted growth for decades. However, according to UNWTO, global tourism suffered its worst year on record in 2020, with international tourist arrivals declining by 74% in 2020 compared to 2019. That equates to a decline of around 1 billion international arrivals, bringing the industry back to levels last seen in the late 1980s.

Every sector of the travel and tourism industry has been affected by COVID-19 including air travel, transport, cruise lines, hotels, restaurants, attractions (such as national parks, protected areas, and cultural heritage sites), travel agencies, tour operators and online travel entities. Small and medium enterprises (SMEs), and micro-firms, which include a large informal tourism sector, make up around 80 percent of the tourism sector and have not survived the crisis without substantial support. It is estimated that this will result in a domino effect on other sectors throughout the tourism supply chain impacting livelihoods in agriculture, fisheries, creative industries, and other services.

The COVID-19 pandemic and its impacts on individual countries and destinations are changing continuously depending on the level of spread and quarantine restrictions. It is estimated that the recovery of the sector will likely

start with rising demand on the side of the travelers for domestic tourism due to the fear of getting infected or being left quarantined in a distant destination while travelling. While governments have extended some support so far to prevent the effects of the pandemic on tourism and travel, it remained mostly domestic and interventions focused on retaining jobs and ensuring key businesses survive.

According to UNWTO preliminary estimates, international tourism experienced a mild 4% increase in 2021, with 15 million more international tourist arrivals (overnight visitors) than in 2020. However, arrivals remained 72% below the levels of pre-pandemic year 2019. An estimated 415 million international arrivals were recorded globally in 2021 versus 400 million in 2020.

Due to evolving nature of the pandemic, it is estimated that restrictions on travel may be reintroduced on and of worldwide including quarantine, mandatory testing, closure of borders and cancellation of air travel. In the mean time, the gradual increase in vaccination rates will help restore the consumer confidence and contribute to loosening of travel restrictions slowly normalizing the travel and making safe international travel a possibility. While experts have cautious recovery outlooks for tourism, a full recovery is not yet foreseen in 2022 with many countries still battling different variants of the pandemic.

The challenging economic environment may also affect the travel demand in 2022. Particularly the spike in oil prices and the rising inflation and the disruption in supply chains may cause higher transportation and accommodation prices, supply shortages putting pressure on consumer purchasing power and savings.

According to experts, prospects for a full rebound in 2022 does not seem likely and in fact according to the UNWTO's estimates, it will take the industry between 2.5 and 4 years to return to pre-pandemic levels of international tourist arrivals. UNWTO experts estimate a growing demand for open-air and nature-based tourism activities, with domestic tourism and 'slow travel' experiences gaining increasing interest.

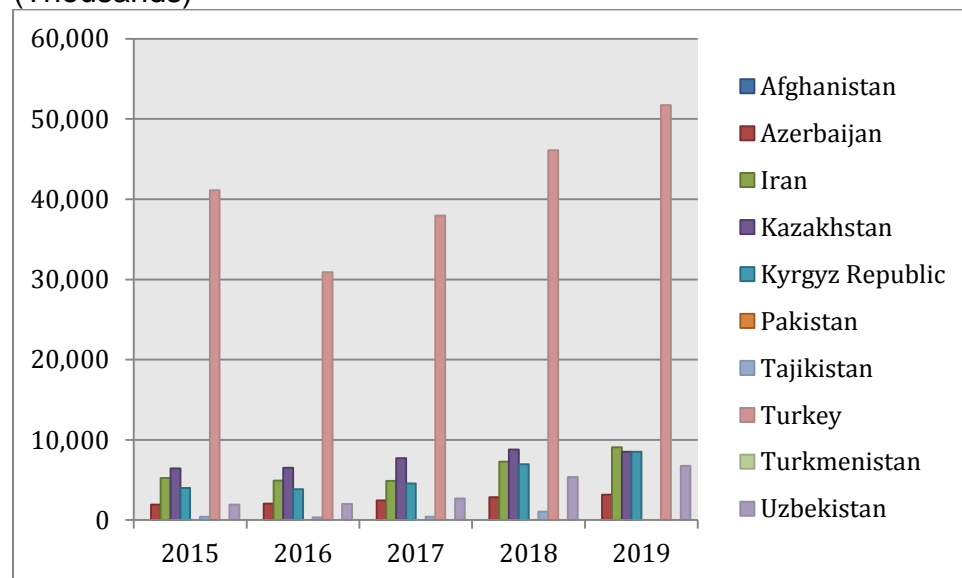
To support the sector's recovery in a wider spectrum both regionally and globally, it is essential to have a global and regional coordinated approach in terms of coordination and the implementation of policies to enhance the travel experience, by applying global protocols for health and hygiene to ultimately rebuild the confidence of travelers. If enough measures are taken, the World Travel and Tourism Council reports that the tourism industry will be the key sector in driving the recovery of the global economy post COVID-19 by generating new jobs and driving visitors back to destinations starting in 2022.

3. TOURISM IN THE ECO REGION

Despite the recent challenges exposed in tourism sector, prior to COVID-19 pandemic, the tourism industry had been the fastest growing sector globally

surpassing the world trade and economy for the past decade. According to the latest figures, one out of ten jobs worldwide was directly connected to tourism. Showing a similar upward trend during the last decade, international travel to the ECO region in 2019 exceeded 87 million people, holding a total of 6 percent share in worldwide tourism arrivals. Considering the region's potential and population, the ratio between tourist arrivals and total international tourism expenditures is still relatively modest. It is also reflected in the tourism revenues as the ECO region has received an international tourism receipt of around 49.3 billion dollars, which account for only 2.72 percent of the global tourism receipts. The average total contribution of travel and tourism sector to GDP in ECO region in 2019 was 7 percent, which is below the global average. In 2019, 10.3 percent of global GDP accounted for travel and tourism industries. Turkey was the main tourist destination in ECO region, registering the highest number and share of international tourist arrivals (11.3 percent) followed by Kyrgyzstan (8.3 percent) and Azerbaijan (7.2 percent).

Table.1 Visitor Arrivals to ECO Region by Country of Destination, 2015-2019 (Thousands)



Source: National Statistical Offices of Member States, WB, UNWTO, WTTC

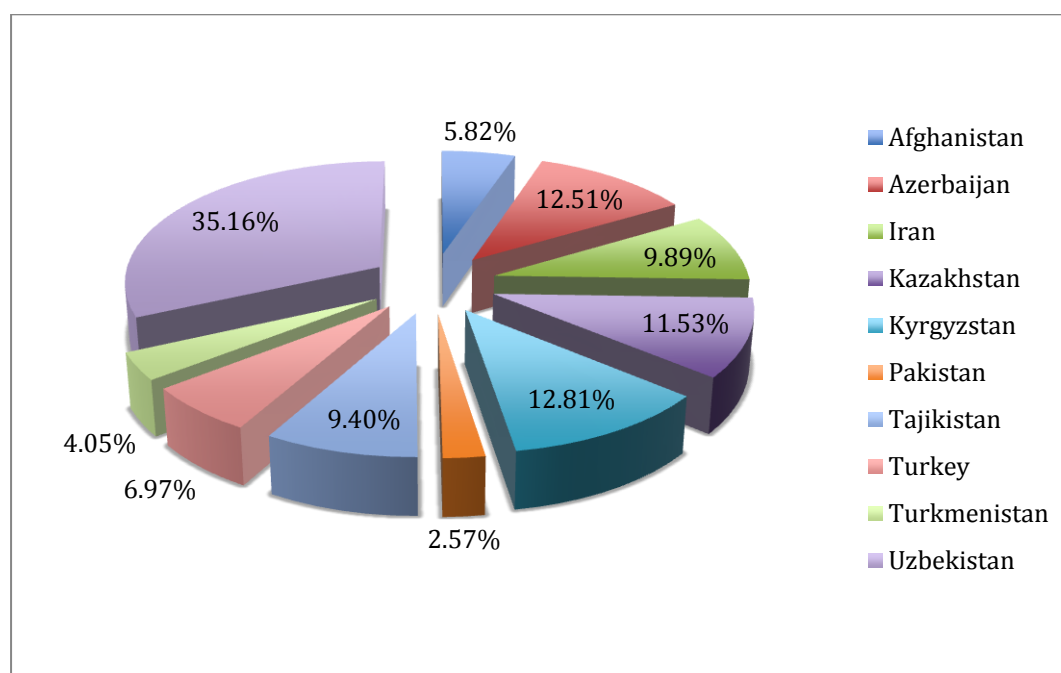
According to WTTC, more than 10 million individuals were employed in travel and tourism industry in 2019 within the ECO region accounting for around 6.9 percent of total employment. Around 10.7 percent of total export of the region in 2019 has been international tourism receipts.

In 2019, the intra regional tourist flows between ECO Member States accounted for more than 24 million with its total share standing at 27.5 percent, which is far below the potential. In 2019, Uzbekistan has registered 35.16 percent of the intra regional tourism followed by Kyrgyzstan at 12.81 percent, Azerbaijan at 12.51 percent and Kazakhstan at 11.53 percent.

Table.2 International Arrivals to ECO Region by Country of Origin, 2015-2019

	2015	2016	2017	2018	2019
Total	61,119,418	50,831,377	60,923,140	78,028,959	87,240,915
Africa	579,289	520,804	618,207	841,739	1,022,990
Americas	1,384,785	839,759	705,381	944,978	1,157,738
East Asia and The Pacific	1,742,915	1,146,119	1,332,684	1,695,945	1,992,871
Europe	43,469,785	35,016,907	42,873,243	55,972,361	62,701,824
Middle East	5,768,381	4,234,054	5,222,239	7,528,938	8,638,243
South Asia	3,068,977	3,262,373	4,376,124	4,217,587	4,867,775
Others	5,105,286	5,811,361	5,795,262	6,827,411	6,859,474
Afghanistan	590,468	783,938	850,264	1,127,261	1,396,075
Azerbaijan	1,726,380	1,766,778	1,786,494	2,578,475	3,004,062
Iran	1,874,167	1,944,933	2,886,061	2,260,915	2,373,918
Kazakhstan	4,558,447	4,251,541	4,974,547	2,775,619	2,768,412
Kyrgyzstan	1,726,592	1,742,966	1,842,660	2,571,215	3,076,097
Pakistan	305,380	302,493	377,770	459,633	617,950
Tajikistan	579,219	651,120	990,314	1,762,621	2,256,536
Turkey	929,688	925,587	1,010,312	1,263,165	1,673,965
Turkmenistan	543,732	413,151	499,973	641,940	973,086
Uzbekistan	2,809,353	2,973,307	4,355,861	8,642,133	8,439,984
Intra ECO	15,643,426	15,755,814	19,574,256	21,960,147	24,007,586
Share	25.6%	31.0%	32.1%	28.1%	27.5%
Extra ECO	45,475,992	35,075,563	41,348,884	56,068,812	63,233,329
Share	74.4%	69.0%	67.9%	71.9%	72.5%

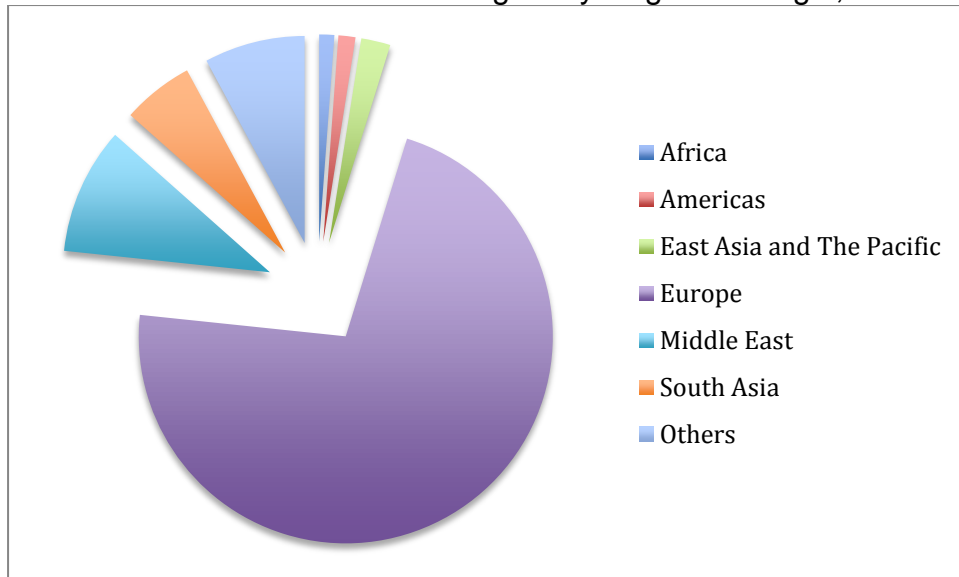
Table.3 Intraregional Arrivals to ECO Region by Country of Origin, 2019



In 2019, the number of visits from non-ECO countries was more than 63 million, accounting for a total of 72.5 percent. Around 71.87 percent of

international visits were realized from Europe. This indicates the popularity of ECO region for Europeans as a tourist destination.

Table.4 Visitor Arrivals to ECO Region by Region of Origin, 2019



There is limited data for 2020 and 2021, yet the regional tourism sector was one of the hardest hit industries by the corona virus pandemic. The revised scenarios made by international tourism organizations indicate that the regional tourism sector shrank by 60 to 80 percent in 2020. It remained still in survival mode in 2021 until July when the global widespread use of vaccines has boosted hopes for recovery. Forecasts given in UNWTO World Tourism Barometer, January 2022, indicate a modest improvement was recorded in year 2021 especially for Turkey in January-November 2021 though the tourism earnings recorded remained below the pre-pandemic levels in 2019. Despite the challenge of the omicron variant which hampered tourism in the beginning of 2022 with introduction of new travel bans and restrictions, it had limited impact as cases receded. It is still estimated that post-pandemic recovery of tourism sector to 2019 levels in the region will be slow. Despite the clear improvements in international travel and easing restrictions, uneven vaccination rates globally and in the region may put the recovery at risk. While easing restrictions on international travel is expected to rebound international tourism with some signs of positive outlook in 2022, domestic tourism is estimated to support the recovery of the sector for those countries who are not dependant on international arrivals. The changing tourism trends after the pandemic for open air activities, rural and nature based tourism may help compensate the regional domestic tourism. Looking ahead, the measures taken today regionally will shape tourism of tomorrow. The current obstacles will turn into opportunities for recovery of tourism sector only with the active support and coordination among both public and private stakeholders nationally and regionally by jointly revitalizing regional travel. Only then the regional tourism sector will adjust and come stronger through the process.

3.1 ECO Region Tourism Competitiveness

The 2019 edition of Travel & Tourism Competitiveness Report features the latest iteration of the Travel & Tourism Competitiveness Index (TTCI). Published biennially, the TTCI benchmarks the T&T competitiveness of 140 economies and measures the set of factors and policies that enable the sustainable development of the Travel & Tourism (T&T) sector, which in turn, indicates the viability of a country to invest and travel within the tourism sector. Tourism sector is defined as a priority area in ECO Vision 2025 but as can be seen in Table 6, according to complete performance results of 2019 TTCI, the level of global competitiveness of the tourism sector in ECO Member States is relatively low. While the report includes no data for Afghanistan, Turkmenistan and Uzbekistan, Turkey holds its position as the region's top scoring member state in tourism sector. The average score of ECO Member States is 3.54 ranging from 3.10 in Pakistan to 4.2 in Turkey. The region has generally improved its competitiveness rank since 2017.

Turkey has the highest score in tourist service infrastructure ranking 37 globally with a score of 5.0. Pakistan with a score of 121 remains the least competitive country in the region when it comes to T&T, including the region's least favorable safety and security conditions with a ranking of 134. On the other hand, the Member States in the ECO Region have improved across all pillars of T&T enabling environment and policy conditions to generate tourism but are often challenged by lower scores for international openness. Security concerns play a role in some ECO Member States restricting international openness. To have a competitive travel and tourism sector internationally requires a certain degree of openness and travel facilitation. Restrictive policies such as cumbersome visa requirements diminish tourists' willingness to visit a country. International openness represents greatest disadvantage of the ECO region relative to global competition. Tourists intending to visit the ECO region often face barriers while the aviation and overall T&T sector is stifled by limiting bilateral air service and regional trade agreements. The region has to work on removing the barriers for tourism facilitation and better trade integration to improve its competitiveness globally.

Table.5 ECO Region TTCI 2019 Scores

Rank	Country	Score	Change since 2017		Difference from global Average (%)
			Rank	Score	
43	Turkey	4.2	1	2.0	9.8
71	Azerbaijan	3.8	0	2.7	-1.3
80	Kazakhstan	3.7	1	2.2	-4.6
89	Iran	3.5	4	3.4	-7.9
104	Tajikistan	3.3	3	3.1	-14.6
110	Kyrgyz Republic	3.2	5	4.1	-16.0
121	Pakistan	3.1	3	7.1	-19.5
	ECO Region Average	3.54			-7.9

The underutilization and preservation of natural and cultural resources is another challenge the regional tourism sector must overcome. Only Turkey and Iran scored above average for cultural resources. In fact, ECO region's rich historical and cultural heritage and geographic features create the potential for significant natural and cultural tourism; which is also indicated by the number of UNESCO natural World Heritage sites each Member State has, yet the region performs low for natural tourism digital demand and natural asset attractiveness. More needs to be done to expand habit protection and heritage sites in the region. Moreover, the relatively low digital demand for ECO region's natural and cultural demand indicates potential gaps in marketing and traveler perceptions. Safety and security concerns and ineffective promotion and marketing of the region are some of the reasons of this gap. To generate tourists and improve competitiveness of the ECO region with its natural and cultural potential, the region needs to maintain its edge in protection of natural and cultural heritage and tourism service infrastructure while simultaneously removing business, travel and security barriers. Combined with the regional advantage of price competitiveness and backed with enhanced enabling environment, international openness and global digital promotion, the region may increase its competitiveness scores globally.

The region also underperforms the world on Business Travel pillar. This indicator measures the average number of international associations meetings held annually in each country. The number of international association meetings taking place in a country is included to capture, at least partially, business travel. Enhancements to air and ground infrastructure in the region, backed with high scores regionally for price competitiveness and increased marketing and promotion activities has the potential to attract more association meetings to the region.

ECO Member States typically score higher than the global average for pillars in the Enabling Environment sub index - in particular, Health and Hygiene indicators. Online services and business operations have increasing importance in T&T, with the Internet being used for planning itineraries and booking travel and accommodation. Generally modest scores in ICT readiness sub index indicates that ECO Member States need to take more advantage of the growing online travel and tourism service offerings, platforms, information distribution and marketing opportunities.

The region has low scores in Environmental Sustainability pillar, which indicates the Member States need to take strict policies to increase environmental enforcement and regulatory stringency of the environmental regulations and variables assessing the status of air pollution, water, forest resources and marine life, proxied by fish stock status, and species endangerments by increasing environmental treaty ratifications from a set of 29 international treaties, all of which bodes well for natural resources and nature-based tourism.

Table. 6 ECO Region Travel & Tourism Competitiveness Index 2019 Overall Rankings

Member State	Global Rank	ENABLING ENVIRONMENT					T&T POLICY & ENABLING CONDITIONS				INFRASTRUCTURE		
		Business Environment	Safety & Security	Health & Hygiene	Human Resources & Labor Market	ICT Readiness	Prioritization of T&T	Int'l. Openness	Price Competitiveness	Environ. Sustainability	Air Transport Infrastructure	Ground & Port Infrastructure	Tourist Service Infrastructure
Turkey	43	4.4	4.3	5.5	4.2	4.6	5.1	3.8	5.6	3.7	4.7	3.6	5.0
Azerbaijan	71	5.1	5.9	6.1	5.3	5.0	5.0	3.1	5.9	4.1	2.6	3.9	3.2
Kazakhstan	80	4.7	5.6	6.5	4.7	5.0	4.3	2.5	6.3	3.8	2.7	2.9	3.4
Iran	89	3.9	5.4	5.0	4.1	4.5	3.7	2.4	6.7	3.9	2.5	3.1	2.8
Tajikistan	104	4.3	5.6	5.5	4.7	3.4	4.3	2.5	5.6	3.9	2.2	2.8	2.0
Kyrgyz Republic	110	4.4	5.2	5.7	4.3	4.0	3.8	3.0	6.1	3.7	2.0	2.1	2.1
Pakistan	121	4.2	3.7	4.5	3.4	3.0	3.6	2.2	5.7	3.6	2.2	3.3	2.7
ECO Average	88	4.4	5.1	5.5	4.4	4.2	4.3	2.8	6.0	3.8	2.7	3.1	3.0

Source: Travel & Tourism Competitiveness Report 2019
Data NA for Afghanistan, Turkmenistan and Uzbekistan

One of the ECO regions highest-scoring pillars is Price Competitiveness relative to the global average. Lower costs related to travel in a country increase its attractiveness for many travelers as well as for investing in the travel and tourism sector. Among the aspects of price competitiveness taken into account in this pillar are airfare ticket taxes and airport charges, which can make flight tickets much more expensive; the relative cost of hotel accommodation; the cost of living, represented by purchasing power parity; and fuel price. Iran is the top scoring country globally in this pillar followed by Kazakhstan and Kyrgyz Republic with rankings of 4th and 9th place globally. The relative global advantage in price competitiveness pillar combined with improvements in other areas can help attract more price conscious visitors to the ECO region.

Consequently, the region suffers from underdeveloped transport and tourist service infrastructure defined by quality airports, ports, roads, tourist services and availability of leading airlines and route capacity. Travellers often face barriers when visiting the region, while the aviation and overall T&T sector is stifled by limiting bilateral air service. The region needs to develop its airport infrastructure and route capacity to make flying and travel to and from the region more accessible and affordable for potential tourists.

4. STRENGTHS, WEAKNESSES, OPPORTUNITIES, AND THREATS ANALYSIS

Strengths	Weaknesses
------------------	-------------------

- Rich and diverse cultural heritage, natural assets and folk culture in all ECO Member States
- Diverse historical cities and, UNESCO World Heritage Sites in all ECO Member States
- Unknown tourism destinations to be explored
- Highly welcoming environment for tourists
- Political will and support for tourism development
- Silk Road heritage
- Availability of tourism accommodation and facilities in capital cities
- Adequate safety and health facilities in major cities
- Geographical proximity to outbound markets
- Scope for diversifying ECO region tourism offer by developing alternative multi-seasonal tourism activities and niche products i.e. medical tourism, ecotourism, religious tourism etc.
- Weaknesses in transport and tourism infrastructure
- Irregularities in Visa Regimes
- Unstandardized, tardy and cumbersome border-crossing and visa procedures and regulations
- Fragmented transport network and connectivity to major destinations
- Lack of easy, low-cost air connectivity to and from all ECO Member States and major markets
- Inadequate marketing strategy
- Lack of a recognizable unified regional tourism brand
- Lack of Joint Marketing and Combined Tour Packaging
- Lack of a digital platform to promote the regional tourism initiatives
- No regional presence in major digital tourism platforms.
- Lack of unified and harmonized service quality and environmental standards for tourism services and facilities
- Poor enforcement and monitoring of standards governing the work of service providers and facilities in the sector
- Inadequate harmonization of tourism regulatory frameworks
- Lack of regional synergy for cooperation and coordination among the private and public national tourism organizations and bodies
- Shortfalls in skilled, well-

trained, customer and service-oriented tourism workforce

- Slow-moving intergovernmental communication and cooperation among the Member States and the relevant tourism bodies and institutions
- Lack of professional tourism and hospitality training to enhance quality of services
- Lack of systematic cooperation platforms and knowledge exchanges among public and private stakeholders
- Lack of a coordinated approach and incentives across the ECO Member States for promotion of investment initiatives in tourism sector
- Unequal uptake of digital technologies in tourism sector across ECO region
- Uneven tourism investment promotion and facilitation around the region

Opportunities

- Continuing growth of the tourism sector internationally
- Pro-tourism approach of the Member States
- Availability of isolated, authentic, undiscovered tourism destinations that appeal to travellers seeking off the beaten track destinations.
- Growing international interest in Silk Road heritage destinations
- Predominantly young population to be employed in tourism work force
- Availability of private sector open for sectoral cooperation
- Availability of international finance

Threats

- Increasing global competition in tourism sector
- Continuing health and pandemic risks globally
- Risk of economic crisis in tourism generating markets
- Natural disasters
- Security risks and political unrest in some Member States
- Risks of doing business in the region
- Lack of mechanisms to facilitate local and foreign

- institutions to fund tourism initiatives
 - Expanding global online tourism presence
 - Ethnic diversity and local communities with appealing authentic experiences to the visitors
 - Scope for development of international tourist routes in the region
 - World class tourism infrastructure, hotels and airports in some Member States
- investment in tourism sector

Source: ECO Secretariat Tourism Directorate Staff Analysis

5. ECO VISION 2025 TOURISM OBJECTIVES

The strategic vision of the ECO Region in the area of Tourism as defined in the ECO Vision 2025 is *“to establish a peaceful and green tourism destination with diverse products and high quality services in the region.”*

Eco Vision Guiding Lines:

Guiding line for tourism development reflected in Serial no. i - x of Section 3D of ECO Vision 2025 sets the following targets for tourism sector to be achieved by 2025 as follows:

- i. The ECO-Tourism brand through effective mediums at the regional, national and international levels will be strengthened in order to attract first-time and repeat visitors.
- ii. Silk Road tourism through cooperation with the international community and relevant organizations will be revived.
- iii. Visa facilitation for the citizens of the region.
- iv. Tourism activities will be diversified into various niches including; health/medical, ecological, culture, winter, sea, mountain sports, climbing, skiing, desert and religious.
- v. In tourism promotional activities, utilization of electronic media will be increased.
- vi. Tourism related human resource development and capacity building activities will be promoted.
- vii. Relevant rules and procedures in tourism sector will be adopted in the ECO Region.
- viii. ‘Standardization and accreditation bodies’ and ‘sustainable and green tourism’ monitoring mechanisms will be established and improved in collaboration with international tourism bodies.
- ix. Private sector and local community involvement in the tourism activities will be strengthened.
- x. Diverse means and new solutions will be developed and utilized to address emerging issues and range of markets to best serve the ideals and goals of sustainable tourism in the region.

6. GUIDING PRINCIPLES

The actions proposed to be observed in the ECO Regional Action Plan for Sustainable Tourism Development are guided by the ECO Principles for Sustainable Tourism Development adopted in the 3rd ECO Ministerial Meeting on Tourism.

Eco Principles for Sustainable Tourism Development

Sustainable Tourism in the ECO region meets the needs of contemporary generation (tourism stakeholders) without compromising the ability of the region's future generation to meet their needs. It leads to manage all available resources in such a way that economic, social, cultural and aesthetic necessities can be fulfilled while maintaining cultural integrity, essential ecological processes, and biological biodiversity and life support systems in the Region.

Sustainable tourism in the ECO region should seek a balance among (a) economic benefit and investment; (b) social participation, including local communities, with direct earnings, and seeking preservation and consolidation of its cultural values and traditions; (c) conservation and protection of environment and biological diversity, taking into account the introduction of education and dissemination of information to promote an environmental consciousness among the local population and visitors.

ECO Sustainable tourism development is conducted (operate) in the framework of sustainable development while addressing the natural, cultural and human environments. It calls for special priority in the matter of cultural diversity and respect for the human dignity of both local communities and tourists. It should meet the economic expectations and environmental requirements of destinations. It is considered the establishment of stakeholders' alliances based on sustainability criteria, an integrated policy approach, consideration of regional culture and economy, participation of all actors including active role for industry in sustainable tourism development.

Sustainable Tourism Development guidelines and management practices are applicable to all forms of tourism in all types of destinations. Sustainability principles refer to the environmental, economic and socio-cultural aspects of tourism development, and a suitable balance must be established between these three dimensions to guarantee its long-term sustainability.

ECO regional sustainable tourism development, a means to ensure country planning in each ECO Member States, is mutually supportive and a common approach for integrated tourism development to be observed in the region. It provides an overall regional framework for maximized economic benefits of tourism avoiding destinations degradation from tourism activities.

It fulfills the strategic objectives identified by ECO Vision 2025 for "establishing a peaceful and green tourism destination with diverse products and high quality services in the Region" based on the following principles:

1) Principle of Inter-generational Equity

This principle oversees the preservation of the natural and environmental resources for the benefit of the next generation and guarantees the safeguarding of the tourism resources of the region (by present generation) for future generations. To observe Intra-generation Equity in regional tourism development, the Principle of Prevention Action and Precautionary Principle based on international law should be taken into consideration.

2) Principle of Intra-generation Equality

This principle applies for fair use of natural resources by present generation to address their development needs and economic growth as well as social welfare. It also implies that use of shared natural resources by one State should fairly take into account the developmental needs of other State.

3) Principle of Integration development and environment

This principle implies the need to ensure that environmental considerations are integrated into tourism development programs, with a view to achieving sound, continuous and sustainable economic growth as well as ensure tourism development proposals designed to meet international guidelines for sustainable development and integrate to national development plan. To observe the integration principle in regional tourism development, the principle of right to development, the polluter pays principle, principle of dissemination of environmental information; principle of environmental impact assessments based on international law should be noted.

4) Principle of sustainable use of natural and biodiversity resources

It considers the optimal use of environmental resources, maintain essential ecological processes and conserve aesthetic values as well as biodiversity resources of host communities. The principle of sustainable use of natural resources aims to ensure the exploitation of natural resources in a sustainable, appropriate, rational and/or prudent manner. Its approach is to focus on the adoption of standards governing the usage rate of natural resources in tourism development process, particularly rare and precious resources such as water and energy, rather than their preservation for future generations. To observe this principle, the principle of conservation and sustainable use of biodiversity resources for considering ecosystem approach in tourism development plan in ecologically sensitive areas and protection and rational exploitation of ecosystem biodiversity, species diversity, and genetic diversity should be applied.

5) Principle of preservation of cultural identity

This principle deals with the need to respect, preserve and support the identity, integrity and legacy of local and indigenous cultures in tourism destinations. This principle has a meaningful linkage with the principle of carrying capacity and should be analyzed with the principle of the participation of the local community in the management of tourism destinations.

6) Principle of carrying capacity

This principle addresses the need to identify the limits of social and environmental capacities of tourism destinations and reflect them in relevant policy and planning, in order to absorb tourists without submerging and overwhelming local culture and causing environmental damage. The principle of carrying capacity often calls for a restriction (control) on tourism to avoid cultural and environmental degradation.

7) Principle of cultural and natural heritage and landscape

This principle addresses the need for the collective protection of natural heritage sites of outstanding universal value and promotes landscape protection, management and planning, in tourism destinations and their buffer zones, and to retain a harmony with the cultural and natural heritage of the area.

8) The participatory principle and partnership of all stockholders

The principle of partnership addresses the need to provide an appropriate environment in which all stakeholders have the opportunity to conduct their affairs and hear and be heard. The participatory principle also implies the need to have shared responsibility at all levels and within all processes. It implies that the role of all stakeholders including ECO tourism industry, local and regional investors, local community, government representatives, international organizations, NGOs and environmental groups on the management and decision making process at tourism destination should be guaranteed. It also observes the need for active participation and involvement of local communities and indigenous peoples in the decision making process of tourism development and management at ECO tourism destinations.

9) Principle of integrated sustainable tourism planning

This principle describes the need for the integration of ECO regional and national sustainable tourism strategies, policies and planning into overall national development plans. Such integration is crucial for the sustainability of tourism activities and development in destinations in the Region. It also focuses on the need for cross-sectorial integrated planning and projects as well as creation of chain production in tourism industry across the Region.

10) Principle of committed tourism industry

This principle applies to the participation, involvement, engagement, and commitment of the tourism industry to short, medium, and long-term policy setting and decision making and their implementation and management processes regarding sustainable tourism activities. It also considers that the sustainability of tourism activities in ECO tourism destinations depends on the approaches of the regional and international tourism industry and the types of services and products to be offered at destinations and the fact that short term interests of tourism business should transform to mid and long-term one by the tourism industry through, inter alia, close partnerships with government and civil society, better environmental management and practices, higher commitments to engender a new culture of accountability and apply sustainable consumption and production patterns to tourism activities in ECO tourism destinations.

11) Principle of tourism safety and right to rest and leisure

The principle of tourism safety addresses the need to ensure the security and safety of visitors and their belongings, as a necessary precondition to establishing a sustainable business in ECO tourism destinations and observes the need to respect law and value of the visiting country by tourists. This principle also implies the right of everyone to rest and leisure as an inalienable part of human rights and applies to the right of all persons to enjoy reasonable work hours, periodic holiday with pay and freedom of rest and movement without limitation. It also considers the right of visitors to have easy access to ECO tourism destinations while addressing seasonality of tourism.

12) Principle of sustainable transport development

This principle addresses the role of sound, safe and sustainable transport system in sustainable development of ECO tourism destinations. It also addresses the needs for reliable and economically viable connectivity system in the ECO region to provide market friendly access to these destinations through integrated destination access strategies in our Region.

13) Principle of incentive measures and voluntary initiatives

This principle addresses the use of incentive measures and voluntary initiatives as socio-economic tools to serve the participatory principle, and raises the issue of environmental consciousness, dissemination of information and capacity development in ECO tourism destinations.

14) Principle of development of suitable indicators and standards

This principle addresses the need to develop basic indicators and standards to monitor the progress of the sustainable development of tourism, and to assist decision-makers and policy-makers in focusing on the sustainability of tourism activities and development in ECO Region.

By implying this principle, indicators and standards can translate physical and social science knowledge into manageable units of information that can facilitate the decision making process. They can help measure and calibrate progress towards sustainable development tourism goals as indicated in vision 2025. They can also provide early warning, sounding the alarm in time to prevent economic, social and environmental damage. This principle has links with the sustainability principle.

15) Principle of sustainable consumption and production pattern in tourism industry

This principle addresses the need to eliminate unsustainable production and consumption patterns in ECO tourism destinations, in order to minimize depletion and reduce pollution. It regulates consumers' behavior towards sustainable consumption and assists the tourism industry in fulfilling its responsibility and commitment to the environment.

16) Principle of financial resources and investment protection in tourism

This principle suggests an appropriate international and regional financial mechanism to address the investment needs of ECO tourism industry and alleviate the financial constraints of ECO sustainable tourism developments. It addresses the need for proper mechanism and national legislation to protect

income investment and confront with financial constraints, which affect the proper implementation of ECO tourism action plan.

Acknowledging the necessity to educate and mobilize the ECO community about sustainability and sustainable principles of tourism, the application of such principles should be made on all ECO Tourism Policies and Development Plans, enabling the pursuit of such targets in an effective and efficient manner.

7. ECO TOURISM STRATEGIC KEY AREAS

In order to meet the requirements of the ECO Vision 2025 objectives, it is essential that Member States give direct attention and undertake explicit policies and plans in a number of areas in coordination with the private sector addressing the main opportunities and strengths in regional tourism sector while aiming also the main regional constraints. In the light of the overall ECO Vision objectives and goals and the outcomes of the SWOT analysis conducted by the Secretariat, below 8 themes have been identified as key strategic areas to achieve the regional tourism objectives as a means for achieving sustainable and inclusive economic growth. Cooperation in implementation of regional initiatives and projects in these key areas can help countries reap the socioeconomic benefits of sustainable tourism development. The strategic key areas of cooperation in tourism sector are as follows:

- i. Branding, marketing and promotion
- ii. Travel and Tourism Facilitation
- iii. Diversification of Tourism Products and Services
- iv. Human resource and capacity building for increase of the quality of the services
- v. Quality development and harmonization of rules and procedures for sustainability of the natural and cultural environment
- vi. Digitalization
- vii. Investment Generation and Facilitation
- viii. Private sector and local community involvement in tourism activities

8. ACTION PLAN OUTCOMES

The implementation of the ten-year Draft ECO Regional Action Plan for Sustainable Tourism Development will trigger a dynamic improvement of major indicators in the tourism sector (international, regional and national tourist arrivals, length of stays of international and regional tourists), and will have stimulating socioeconomic impacts on the region increasing the jobs in the sector, incomes and GDP.

By the year 2032, ECO Regional Action Plan for Sustainable Tourism Development should make it possible to achieve the following outcomes:

- i. the number of tourists visiting the ECO region reaching 150 million;
- ii. enhanced intra-regional tourism;

- iii. Improve the competitiveness of the regional tourism sector;
- iv. the average length of stay is increased to at least 7 days;
- v. the average contribution of tourism to ECO countries' GDP stands at least 12%;
- vi. The total number of jobs created in travel and tourism industry reaches 15 million;
- vii. Direct contribution of travel and tourism contribution to GDP in ECO region is increased up to more than 200 billion dollars.

9. ACTIONS TO BE TAKEN

For realization of this Regional Action Plan, collaboration and commitment is needed at the highest level. Implementation requires harmonious interaction, coordination and collaboration among various parties and organizations at the national and regional level. Governments need to set explicit goals and form implementation strategies at the national level in order to carry out the proposals contained in the Action Plan. To enable implementation of the ECO Regional Action Plan for Sustainable Tourism Development, the Member States agreed to give effect to the following actions defined in each key area. The actions, defined in line with eight strategic key areas enumerated above, will be implemented in accordance with the arrangements described in section 11 below. For each action the Member States in collaboration will prepare an implementation modality indicating the mode of activities at the regional level, and the timeframe. The review and monitoring process of each action will be worked out in collaboration between the Secretariat and Steering Committee as explained in section 11 below.

10. IMPLEMENTATION, FOLLOW-UP AND REVIEW MECHANISM

- i. In three months following the adoption of this Regional Action Plan on Tourism, the ECO Secretariat will convene a high-level working group (HLWG) to discuss implementation of the Regional Action Plan on Tourism. The Meeting shall, among others, develop timetable for the activities envisaged under each Action, giving precedence to those of priority nature for the Region. The Meeting may also assign a lead country for each Action.
- ii. The implementation of this Regional Action Plan shall be the responsibility of the concerned authorities in the Member States. In order to facilitate the implementation of this Regional Action Plan, each member state shall designate a national focal point to coordinate and oversee the implementation of its national components.
- iii. A Steering Committee of relevant tourism experts/officials will be established by the High Level Working Group referred to above from among the candidates nominated by the Member States and serve as the principal coordinating body to address all issues relating to its implementation. The Steering Committee in collaboration with the ECO Secretariat, national focal points and relevant institutions/authorities in Member states, shall pursue the management, coordination and close monitoring of the activities of the program. ECO Member states shall collectively determine the implementation priorities; develop work program or plans, modes of

- activities for consideration/approval by ECO decision-making bodies.
- iv. The terms of reference of the Steering Committee will be defined by the HLWG. This Steering Committee will, in collaboration with lead countries and the Secretariat, develop indicators/benchmarks for the periodic evaluation of the implementation of the Regional Action Plan on Tourism in general and each action in particular. The inputs from relevant partners, particularly UNWTO and WTTC may be sought in this regard.
 - v. A Technical Committee comprising of experts from, relevant government authorities and stakeholder groups with both public and private sector representatives from each Member States will be formed to undertake bi-annual regional technical expert group meetings to effectively coordinate and support the implementation of the action plan and its requirements.
 - vi. To ensure implementation, and exercise effective execution of its requirements at the national level, the government authorities and stakeholder groups of the Member States participating in the implementation of the Regional Action Plan will form proper implementation management procedures and processes under the management of a National Implementation Supervisory Task Force. It will aim to develop, coordinate, speed up and oversee the proper implementation of regional projects and initiatives within the strategic key areas at the national level through a commonly agreed communication mechanism with the stakeholders and the authorities from the Member States.
 - vii. There will be annual review reports on the status of the implementation of the Regional Action Plan. The review reports, to be prepared jointly by the Steering Committee and the Secretariat, should be submitted for consideration to the annual meetings of the ECO Regional Planning Council (RPC).
 - viii. There will be periodical review committee meetings for the Regional Action Plan, preferably done by the ECO Ministerial meeting every two-year of the implementation of the Regional Action Plan. The periodical review is meant to allow necessary adjustments in the Regional Action Plan in the light of emerging regional and global situations, based on the recommendations made by the Steering Committee and Secretariat.
 - ix. Secretariat will facilitate work of the Steering Committee and the Technical Committee including their physical and virtual meetings. The CPR will be requested to allocate necessary financial resources from the ECO Feasibility and General Purpose Fund (FGPF) and Special Support Fund (SSF).
 - x. The ECO Ministers of Tourism shall supervise, coordinate and monitor the implementation of this Regional Action Plan.

11. FINANCING

For realization of the Regional Action Plan and its requirements, there is a need to have a financial framework, detailing the ways and means through which the proposals in the Regional Action Plan are to be financed. To this end, efforts will be devoted to mobilizing greater financing from a wide range of sources, including from financial institutions, international organizations, the private sector, and PPP arrangements. To support investments with regional

scope, the Secretariat will strive to maintain technical assistance financing from international organizations and financial institutions.

12.DRAFT ECO REGIONAL ACTION PLAN FOR SUSTAINABLE TOURISM DEVELOPMENT

The Strategic Key Areas and the Plan of Action is developed, in letter and spirit, in a way to reflect the regional tourism agenda as mandated in ECO Vision 2025; and above all, the immediate needs and requirements of ECO Member States with a view to promote the competitiveness of the ECO regional tourism sector by creating a favourable environment for its growth by establishing an integrated approach to the tourism sector. The Draft ECO Regional Action Plan for Sustainable Tourism Development sets forth proposals for action at the regional level in eight strategic areas. The specific objectives to be followed in the Plan of Action are guided by the ECO Principles for Sustainable Tourism Development. Considering the core mission of ECO as an economic development organization and bearing in mind the multiple impacts of tourism for sustainable economic development as well as the wide spectrum of stakeholders involved or affected by tourism, the Plan of Action concentrates on different tourism dimensions.

Based on the defined strategic key areas, ECO Regional Action Plan for Sustainable Tourism Development has been designed as a general road map to enable systemic coordination and cooperation among the ECO Member States for achieving the expected outcomes in the implementation of the strategic key areas for the regional development of tourism sector. It is premised on the responsibility of ECO Member States and all stakeholders in the tourism sector to ensure that the tourism aims and objectives as envisioned by the leaders of the ECO region in ECO Vision 2025, and the Khujand Declaration on tourism adopted by ECO Tourism Ministers is timely achieved. It provides a systemic approach to coordinate cooperation among the ECO Member States to reach the aims set forth through sharing experience, expertise and facilities. It specifies the strategic key areas, general objectives and guidelines to pursue activities that would enhance joint regional cooperation among ECO Member States in tourism sector, which is also in line with the national priorities of the Member States. The Action Plan emphasizes the extensive opportunity for developing sustainable tourism in the region.

Key Area 1. Branding, marketing and promotion

Main Challenges:

The region lacks a common approach for marketing, promotion and branding tourism activities and despite its unique natural and cultural assets, tourist arrivals to the ECO region are below its potential and it is a relatively less popular tourism destination internationally, while its image and hence potential is unsteady. A concerted common action by ECO Member States to embark on a joint tourism programme is imperative to provide the ECO region a more attractive, competitive, powerful and recognizable product image as a tourism destination and a strong institutional boost to highlight the attractiveness and

variety of ECO tourism experience. In this regard, a regional collective promotion and marketing programme to promote the region, as a single destination must have to be developed with the collaboration of the tourism Ministries and private stake holders of the region. This joint promotional and marketing programme also calls for a platform for intensified cooperation of both public and private sectors in ECO Member States in establishing joint investment initiatives and programs to overcome the main challenge of budgetary restrictions for enhancing marketing, promotion and branding of the region in the international arena. To effectively position the ECO region globally, by marketing and promoting ECO region's assets extensively in the areas of history, nature, religion, archaeology, living culture, cuisine and hospitality, the Member States may take the following actions:

1. Create a common regional tourism brand in collaboration and a coordinated approach to publicize and promote ECO Region under this brand through both formal and informal partnerships between both private and public sector organizations and in various digital platforms.
2. Establish alliances between national and regional tourism stakeholders with a view to designing a joint tourism marketing strategy for the ECO region which will create a common brand, define the target markets, communication strategy, distribution approach and implementation structure and to enhance cooperation efforts for promotional activities at the sub-regional level as well as at the level of the ECO region through creating awareness, nationally and internationally, of its superlative heritage, environment and special qualities and consider setting up a regional tourism promotion and marketing mechanism.
3. Hold ECO-wide promotional tourism events such as fairs, exhibitions, road shows, Olympic games within the region and internationally.
4. Design an actively used ECO Regional Tourism Website to take advantage of e-marketing in order to create a global marketing network and sharing tourism related information, business opportunities, investment initiatives, tour packages, hotel and tour bookings and other relevant data to facilitate accessibility to various regional and national tourism opportunities under the same platform as a user-friendly portal for visitor enquiries.
5. Ensure strong regional presence in destination marketing materials especially well-known digital platforms, information portals and major international tourism and travel-trade fairs.
6. Intensify tourism networking and contacts in source markets and in international tourism and travel trade fairs, through publication of ECO Tourism Guides and travel brochures, including TV programs, travel films, and cross-cultural travel workshops and seminars involving, among others, travel agents and tour operators. Engagement of p.r. and promotion through specialist media and operators may be considered.
7. Organize familiarization trips for travel trade media and the tourism sectors within the member countries.
8. Revive and promote Silk Road Tourism initiative with the cooperation of the Member States, international community and relevant organizations and promote ECO-wide Silk Road cultural heritages in all available platforms.

- i. Create an effective Silk Road brand strategy, enhancing collaboration between Silk Road destinations and increasing consumer awareness.
 - ii. Initiate strategic planning of regional tourism around regional silk roads and launch a joint Silk Road tour package to improve attractiveness of the tourist destinations along the Silk Road through reflecting the local cultural heritage.
 - iii. Increase connectivity and accessibility between destinations and products through developing ECO Silk Road travel routes
 - iv. Increase the online presence of ECO Silk Road tourism, through the ECO Regional Tourism Website.
 - v. Hold international ECO Silk Road festivals, exhibitions and events
9. Set up Tourism Destination Chain and Connectivity among ECO Countries and hold ECO wide promotional events within the region including annual competition of ECO Tourist destinations.
 10. Set up a digital tourism market promotion database of cultural events to help publicize and promote visual and auditory arts, particularly traditional festivals and folk events accessible to the public.
 11. Publish a joint “Journal of Tourism” in ECO Member States.
 12. Activate the “ECO Tourism Promotion Fund” to mobilize funding and resources for maintaining continuous promotion of the region in the international arena.

Key Area 2. Travel and Tourism Facilitation

Main Challenges:

Travel facilitation is closely linked with the development of Tourism and is a key contributor to the overall appeal of a destination, which can lead to increased demand and sustained tourism performance. Therefore, accessibility of the ECO region is the primary requirement for promoting tourism to and within the region. The development of the tourism industry throughout the region needs intra regional and international connectivity through all modes of the transportation in order to ensure comfortable, cheaper, accessible and secure travel in ECO Region. There is an immediate need for cooperation in the ECO region for making travel into and within ECO region easier and more efficient. Development of easy and cost effective air connectivity among all the ECO Member States will boost tourism flow within and to the region.

Travel facilitation also involves all the services and facilities related to getting the potential tourist from his/her point of origin to the destination including visa policies and fees, travel regulations and taxes, and the relevant immigration processes and services. The additional time, effort and cost associated with visa and entry formalities, whether real or perceived, can influence destination choice of the potential consumers. There is a need for ECO Member States to increase partnerships and common initiatives to ensure fast, transparent and effective travel facilitation and visa regimes. An accessible and efficient visa regime enables ECO region to attract visitors from viable global markets. Introducing measures to make these policies and processes more efficient

and effective can improve the travel experience into the region with implications for the economies of the Member States. Due to inter linkages between transport and tourism sector to achieve the targeted aims for facilitation of mobility and accessibility of the region and tourism attractions, a cross-sectoral cooperation, consultation, planning, synchronization and harmonization of transport and tourism policy synergies and coordination of action among all the Member States and relevant stakeholders in public and private sector is strongly needed. To ensure smooth and cost-effective accessibility of the region and stimulate travel flows and tourism growth, Member States may take the following actions:

1. Organize meetings of transport, tourism and other relevant authorities to expand connectivity through air, water, rail and land transportation.
 - i. Air-travel being the most convenient and fastest way of travel, organize meetings of transport, tourism and other relevant authorities for increasing aviation capacity and regulations to promote cost-effective air travel arrangements among Member States, introduction of new air routes to lucrative priority markets, direct air links between potential regional tourism destinations, increased flight frequencies and improved travel connectivity overall.
 - ii. Organize meetings of relevant authorities for improving land and rail connectivity to enhance accessibility and travel time between the main cross-border tourism attractions and cities among the Member States.
2. Collect information on the existing infrastructure and facilities that can support ECO intra-regional connectivity and tourism.
3. Identify obstacles and opportunities on transportation linkages.
4. Increase regional coordination for improving tourism services and local transportation to the main tourism attractions of the Member States.
5. Organize meetings of relevant authorities to initiate smart visa policies including electronic visa applications, changes to the method of visa issuance, including Tourist Visa on Arrival (VoA), immigration on board, introduction of other forms of travel authorization and improve processes and remove barriers to ease visits to ECO region by minimising the deterrence to legitimate travellers whether for leisure or professional purposes. Consider reducing fiscal and administrative burdens by setting up a common set of rules applying to people crossing the ECO borders, including automation and harmonization of entry requirements and the rules on issuance of visas for short stays (up to three months).
6. Support the development of common ECO Tourism Visa for the region and organize meetings of concerned authorities on liberalization of visa regimes, expanding of visa waivers across ECO Member States and consider launching a multi-destination, limited time “ECO Tourism Visa” scheme for ECO Member States for people travelling to destinations in the ECO region for short-term.
7. Study the grounds for an “ECO Common Tourism Visa for non-ECO Member States”.

8. Organize meetings of relevant authorities to review the regulatory framework to promote smarter tax policies and better coordination between national, regional and local authorities to ensure ECO region is a competitive destination to visit and in which to do business; VAT, levies, local taxes and air passenger taxes may be included within the scope of the review of the regulatory framework.

Key Area 3. Diversification of Tourism Products and Services

Main Challenges:

The ECO region constitutes a rich and unexplored network of destinations capable of providing unique experiences catering to various tourism segments such as business, culture, nature and adventure, sun and beach holidays, and health and wellness, among others. Diversifying products, services and market in the tourism sector is essential to avoid dependence on a single activity or market. Building on partnerships to develop enhanced tourism experiences with a view to optimizing key assets for the benefit of tourism and economic development through increasing regional spread, season extension and promoting sustainable growth has huge benefits for increasing the demand to the ECO region. Tourism is currently highly seasonal in the region but there is scope for developing alternative multi-seasonal activities to enrich the tourism offer during the off-season. The businesses require investments in capacity and quality to reduce their seasonality and improve their profitability. Based on its capacity, the ECO region can diversify tourism services and products into diverse segments. To achieve the ECO Vision 2025 objectives to help address seasonality, regional experiences that combine different tourism products and experiences that provide year-round tourism opportunities in the region across Member States needs to be developed. Achieving this objective regionally requires action at the national level and close cooperation among the tourism Ministries of the Member States. To promote multi-seasonal tourism opportunities through diversification of regional tourism products, the Member States may take the following actions:

1. Support the regional tourism sector to expand into niche products or markets where there are demonstrable benefits to the regional economy, its people and the sustainability of the tourism industry.
2. Investigate and identify the potential and opportunities for diversification of intra-regional tourism and broaden the tourism offer by joining efforts to bring out lesser-known or niche destinations and identifying all available and potentially available tourism resources and facilities in various tourism segments such as ecotourism, cultural tourism, architectural heritage tourism, religious tourism, health tourism, recreational tourism, and business tourism, urban city break tourism, lake, mountain climbing, cycling, health, culinary, hunting, fishing, rural tourism, transit tourism, shopping, wildlife tourism, bird watching, and many others and making it internationally more accessible throughout various networks.
3. Establish a data bank and catalogue of specialized tourism destinations and products, including natural and cultural heritage sites, through the identification of new tourism experiences and/or an

optimization of existing tourism experiences or destinations in the ECO region such as ECO ecotourism database, ecotourism catalogue for the ECO region.

4. Identify national and intra-regional potential packages of tourism opportunities to develop and boost off-peak tourism destinations and products and to stimulate travel through possible services that would meet the interest of target markets such as MICE, health and wellness, urban tourism, outdoor tourism, or by social tourism schemes aimed at specific segments like seniors, youth, families, etc.
5. Identify cross-border tourism opportunities and form regional viable tourism clusters at popular destinations close to borders to encourage intraregional tourism.
6. Hold joint meetings and seminars of various tourism segments in the region to intensify collaboration to enhance regional and global reach and strengthen multi-stakeholder coordination.
7. To stimulate demand for travel during off-peak season, propose incentives offered by the public and private sector to trigger demand to facilitate intra-regional travel and encourage increased length of stay.
8. Develop youth exchange programs, international tourism and sports festivals, sports programs and camps for individuals aged 16 to 30 within the ECO region.
9. Hold subsidised joint social tourism programmes for people with special needs in the region.

Key Area 4. Human resource and capacity building for increase of the quality of the services

Main Challenges:

Professional and qualified workforce is essential to the success of any tourism business or destination. With the rapid growth of tourism sector, the need to develop the required human resources for the tourism industry has become imperative. Many ECO Member States face the problem of lacking strategies and policies for human resources development for tourism. Some of the sector specific problems which need to be addressed in the ECO region include the quantity and quality of human resources which are related to the labor-intensive nature of the industry and the need for a high standard of specialized skills in international working environments; and the shortage of tourism training infrastructure and qualified trainers in many countries. Providing skills training to vulnerable groups and disadvantaged communities will help ensure future service delivery is stronger and will also be an opportunity to close social inequality while equipping the workforce with the right high quality skills to interact safely with future travelers. To reach competitive standards in terms of facilities and quality of services in international standards, the Member States may take following specific actions at the regional level:

1. Develop human resources development programs and a regional framework mechanism for exchange of training resources and facilities through vocational and university level tourism training programs for ECO regional tourism professionals.
2. Encourage coordinated approach among Member States' training and education institutions, workforce organizations and industry to help ease the critical labor shortage in the sector through regional online learning opportunities following a detailed Regional Training Needs Analysis in tourism sector.
3. Enhance quality and effective tourism apprenticeships by fostering national apprenticeship coalitions and networks in the ECO region.
4. Initiate youth exchange programs among the Member States for facilitating apprenticeship in tourism industry through official annual and seasonal announcements.
5. Coordinate development of specialized training programs, workshops for tourism professionals especially in the SMEs to increase quality of services in the ECO region.
6. Promote cooperation among training centres in the Member States for training of trainers and mentors for strengthening social dialogue through more active involvement of national partner organisations.
7. Establish cooperation with World Tourism Organization (UNWTO) and other international and regional tourism organizations to get their full support to ensure the effective regional cooperation of national tourism institutes with a view to promoting human resources development in the ECO Member States.

Key Area 5. Quality development and harmonization of rules and procedures for sustainability of the natural and cultural environment

Main Challenges:

Development and implementation of harmonized service quality and environmental standards that can help protect the environment and bring tangible benefits to local communities, aligned with international best practices, including those related to safety, health and environment protocols are essential to increasing the competitiveness of the region as a global tourism destination, and attracting tourists from international markets. To minimize the impact of tourism in the Member States' political, environmental, and social climate and provide positive experiences for both visitors and hosts requires joint collaboration and sensitivity. The establishment of a common ECO regional tourism brand as a high-quality tourist destination also requires essentially defining the common harmonized safety, hygiene, environment and minimum service quality standards in tourism services, facilities, hotels, restaurants, heritage sites, transport systems etc. to improve its global profile and image. This objective requires Member States to work in a coordinated and collaborative manner to protect and foster its brand value through regionally harmonized quality standards and regulations while carrying out programmes to ensure the preservation, conservation and promotion of the natural, cultural and historical heritage of Member States. To achieve a

harmonized higher quality service and standards in regional tourism sector in line with the best practices, the following actions may be taken by the Member States at the regional level:

1. Develop regional policies on ecotourism and prepare an action plan of cooperation through feasible short, medium and long term support activities promoting and supporting sustainable ecotourism development at regional level.
2. Promote the adoption and implementation of the ECO regional tourism standards certification system aligned with international best practices into the policy and regulatory framework of the Member States.
3. Develop and implement ECO tourism standards and certification programmes with measurable standards and indicators for each of the tourism areas while addressing and monitoring the essential requirements of facilities and services for visitors, the industry infrastructure, the environment and local communities and make them transparent to the tourists to help with their choices.
4. Strengthen measures to prevent tourism related exploitation and threats on cultural heritage and natural resources.
5. Enhance the ability of ECO regional tourism to address the climate change issue
6. Develop ECO tourist protection guidelines.
7. Develop a regional inspection mechanism to ensure standards compliance.
8. Conduct regional trainings and workshops on the quality standards and sensitizing public and private tourism stakeholders on the development of environment and culture friendly forms of tourism.
9. Promote ECO region as a brand with uniform tourism standards.
10. Adopt appropriate preventative measures and sustainability practices to protect the region's natural tourism assets when developing and implementing regional tourism programs and projects.
11. Collaborate with international organizations such as UNWTO and UNIDO to harmonize and institutionalize 'Regional Standardization and Accreditation bodies' and 'sustainable and green tourism' monitoring mechanisms'.

Key Area 6. Digitalization

Main Challenges:

The technological innovations and the digitalization of the tourism sector has introduced new business models of tourism suppliers, as well as improved and connected operations along global tourism value chains. It has transformed the expectations and behaviors of the consumers, opening up new and highly creative ways of delivering tourism services to enhance the visitor experience. As the vast majority of tourists internationally now use the Internet as their primary means of research, marketing and promotion through various Internet platforms has become a cost-effective and convenient option for reaching the consumers and promotion of tourism offerings and destinations. While some ECO Member States have considerably enhanced their virtual promotion and global reach through the digital platforms, there are

significant differences in the uptake of digital technologies in tourism across ECO region, which still exhibits a huge unused potential in integration of digital technologies into the sector. With tourists increasingly using digital technologies to search, plan and book travel, it is essential that ECO Member States engage meaningfully to incorporate advanced digital technologies and prioritize accelerating the move to a more seamless and contactless end-to-end travel and tourism experience through new technologies to compete favorably with best-in-class tourist destinations around the world. Integration of advanced commonly preferred digital technologies into the regional tourism activities and portals has the potential to facilitate competitiveness and global reach of the ECO region and promotion of its diverse tourism offerings. As the sector fast tracks this transition globally, the ECO Member States may pursue the following actions to enhance the presence and initiatives of the regional tourism sector in digital platforms to expand their market reach and sharpen their competitive edge:

1. Improve the social media presence of the ECO region in various digital platforms through continuous share of engaging content.
2. Create a user-friendly, specialized ECO Tourism Website for easy access to information on tourism offerings, programmes and events in ECO Member States and promotion of the region.
3. Create a digital catalogue of all the tourism destinations of ECO Member States to be hosted in the ECO Tourism Website.
4. Introduce digital tourism initiatives to build the capacities of the Tourism sector of the Member States and compete favorably with best-in-class tourist destinations around the world.
5. Collaborate with travel related advisory websites like Trip Advisor, Trivago, Expedia, Booking.com to promote regional tourism destinations.

Key Area 7. Investment Generation and Facilitation

Main Challenges:

Tourism sector is one of the priority sectors for generation of domestic and foreign direct investment (FDI). Engendering investment in this sector is also inclusively crucial for the other sectors of the ECO Member States for stimulating economic growth and enhancing poverty reduction. While investment instigates the transfer of technology and facilitates improvements in productivity, tourism is the only sector that its product and service is consumed at the same location where it is produced. Therefore by providing products and services to the businesses through the value chain, and directly to the tourists through various means, it also stimulates local economies in creating jobs, increasing per capita income and elevating overall standards of living of the local people. The implementation of tourism infrastructure development projects can help upgrade or reposition destinations, while creating jobs for many. In order to emerge as a fertile and lucrative frontier for investment and explore the enhancement of means to facilitate investment flow to regional tourism initiatives for long-term resilience of the regional tourism sector, the ECO Member States may take following regional actions:

1. Develop initiatives to facilitate investment into regional tourism projects

- including a possible ECO regional tourism investment promotion framework.
2. Prepare a regional Tourism Investment Guide to provide a compendium of policies, laws and incentives across the ECO Member States for identification and promotion of investment initiatives in tourism sector.
 3. Publicize and highlight the opportunities and possibilities of investment, which exist in ECO Member States and the best practices of some Member States in tourism sector by preparing a regional brochure on investment opportunities in the ECO tourism sector in collaboration with the Member States.
 4. Prepare a digital platform where investors can access information on broad ECO investment opportunities in various tourism segments i.e. infrastructure development for transport and telecommunications, hotels, resorts, marinas, golf clubs, spas, boutique hotels; infrastructure for medical tourism such as specialized medical centres and hospitals; entertainment and theme parks etc.
 5. Organize ECO Regional Tourism Investment Conferences, trade shows and fairs with the key objectives of raising awareness of the ECO region's significant investment potential and marketing tourism investment opportunities.
 6. Enhance the role of Public-Private Partnerships (PPPs) in the expansion and upgrading of the existing tourist capacities and activities and for the construction of new facilities of appropriate quality and service standards, using up-to-date technologies.
 7. Promote regional and cross-border tourism projects in the ECO Member States to attract investments.
 8. Promote investment in the conservation of the regional natural and cultural heritage.

Key Area 8. Private sector and local community involvement in tourism activities

Main Challenges:

Tourism is a people oriented sector and its major activities depend on human resources. The sector is underperforming in some ECO Member States as tourism development often takes place without the participation of communities, leading to unsustainable projects and few economic gains for the local communities. Due to the crosscutting nature of the tourism sector, a close coordination across various national stakeholders in the private sector including tour operators, tourism agencies, and tourism organizations is essential to reach the regional tourism objectives. The development of community-based tourism in the region including tourism initiatives that involve local people in all kinds of tourism activities and allow visitors to interact with locals and to encourage rural communities to utilize the tourism resources for their livelihoods has the potential to generate greater economic benefits to the local communities especially for poverty reduction and job creation. The private sector also has a key role to play in

tourism industry. While governments make policies and plans for development of tourism in terms of national economic objectives and priorities, tourism is an economic activity largely carried out by the private sector in many countries. As various stakeholders have different interests in the sector, the Member States encouraging greater participation and cooperation with the private sector and local communities have more chances of achieving efficiency in reaching their tourism objectives.

Since some ECO Member States face constraints in terms of their financial and human resource capacities to carry out their plans to reach their tourism development objectives, there is considerable scope and benefits for strengthening and promoting regional cooperation for reaching these objectives collectively with the public and private stakeholders and the inclusion of the local communities. There is a need for a clear mandate from the Member States to facilitate appropriate roles for the various stakeholders and a close coordination across various national stakeholders in the private sector including tour operators, tourism agencies, and tourism associations and local communities is essential to reach the aims of the ECO Vision 2025. Increasing the private sector participation and role in regional tourism development initiatives, and implementing joint tourism promotion initiatives are key elements to build resilience and publicity of the regional tourism sector. The cultural links among the ECO Member States needs to be further promoted to reinforce the region's cultural image and enhance visits across the Member States and globally. Coordination among the local cultures and communities at the international level can be achieved with the collaboration of the private sector through the national tourism organizations and tour operators. National tour operators and travel agencies are key for involving the local communities into tourism activities and the development of community-based tourism, especially in ECO Member States, where many tourism attractions are difficult to reach, connections with the local population is hard. The active involvement of local people and local community in tourism activities is the major principle of sustainable tourism and highly essential in order to increase the benefits of tourism. Local food, local culture and festivals are add-on products to tourism and it also enables authentic experiences to the visitors. Indigenous knowledge of the local people and communities helps in the conservation of environment and local heritage. In order to attract greater private sector participation and local community involvement in tourism activities, and enhance regional partnership between the public and private tourism sectors and the local community, the Member States may take following regional actions:

1. Identify existing and potential new local tourism products that have good potential to be improved or developed to support the diverse aspects of local cultures.
2. Organize meetings of the representatives of the tour operators and tourism associations of the Member States to evolve ways and means to promote intra-regional tourism.
3. Establish processes for regular communication between the local tourism enterprises and communities and other public and private

- stakeholders in the region through regular meetings of “Council of Tourism” in the ECO-CCI.
4. Publication of a Handbook of Associations and Agencies active in the field of Tourism in the ECO Region.
 5. Intensify public-private sector partnerships and links as an effective marketing and promotion force with the collaboration of local and national tourism organizations and associations of ECO Member States under the auspices of the ECO Tourism Forum and other relevant bodies and networks.
 6. Hold a “Forum of ECO Heads of Tourism Associations, Unions and other Tourism Stakeholders” as a platform for evolving ways and means to promote intra-regional tourism and considering various joint regional Tourism activities including ECO tourism destination chain, designing chain tour packages in the region and increasing the image of the region internationally etc.
 7. Consider establishment of a regional tourist agency.
 8. Establishing a Tour operators chain and connectivity network among major tour operators in ECO region for providing ECO Tourism Routes and Packages and to provide professional services by setting up an appropriate platforms of dialogue, cooperation, data exchange and experience sharing to use all capacities and opportunities in ECO region as a rich area in cultural and historical heritage.
 9. Increase tour operator programming of the ECO tourism destinations, with the modification and expansion of existing tour operator itineraries and introduction of new programmes with cooperation of regional tour operators.