

# ROAD MAP ON FACILITATING ACCELERATED RECOVERY, SAFE AND SUSTAINABLE DEVELOPMENT OF TOURISM AFTER COVID-19 IN THE ECO REGION



Nasir al-Mulk Mosque, Shiraz, Iran



Istanbul, Türkiye



Ascension Cathedral, Almaty, Kazakhstan



Badshahi Mosque, Lahore, Pakistan



Spring in Kyrgyzstan



Iskanderkul Lake, Tajikistan

## 1. INTRODUCTION

ECO Vision 2025 adopted at the 22<sup>nd</sup> Meeting of the Council of Ministers (COM) held in 2017 in 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 cooperation, as it stimulates new economic activities and has a positive impact on employment and community development in reducing inequalities. With these objectives in mind, the Secretariat is committed to contributing to the sustainable and safe development of tourism and urging the Member States to take the necessary measures for promotion of ECO region as a unique tourism destination.



Blue Mosque, Afghanistan



Juma Mosque, Azerbaijan

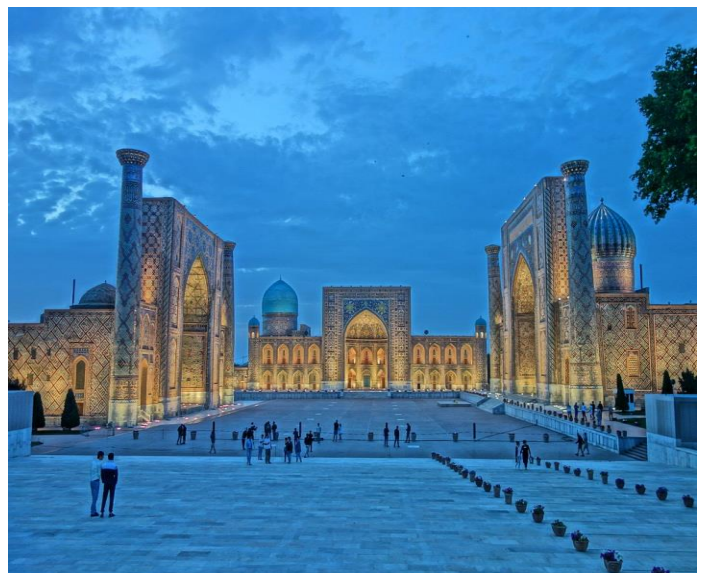
## 2. MANDATE

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 3<sup>rd</sup> 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.

However, the start of COVID-19 pandemics at the end of 2019 retarded progress on tourism development contrary to what was envisaged and planned. Overcoming negative impact of the epidemic and return to pre-COVID-19 levels have become priority in the ECO region. Moreover, the COVID-19 pandemic has provided a chance to reconsider and reset the direction of the regional tourism sector. Hence, to catalyze the potential of tourism, to develop a coherent regional policy approaches to start the substantial and safe recovery of the regional tourism, and to overcome negative effects of COVID-19 Pandemic, "Draft Road Map on Facilitating Accelerated Recovery, Safe and Sustainable Development of Tourism after COVID-19 in the ECO Region" has been developed on the basis of the immediate needs of the regional tourism industry.



Dasoguz, Turkmenistan



Registan, Samarkand, Uzbekistan

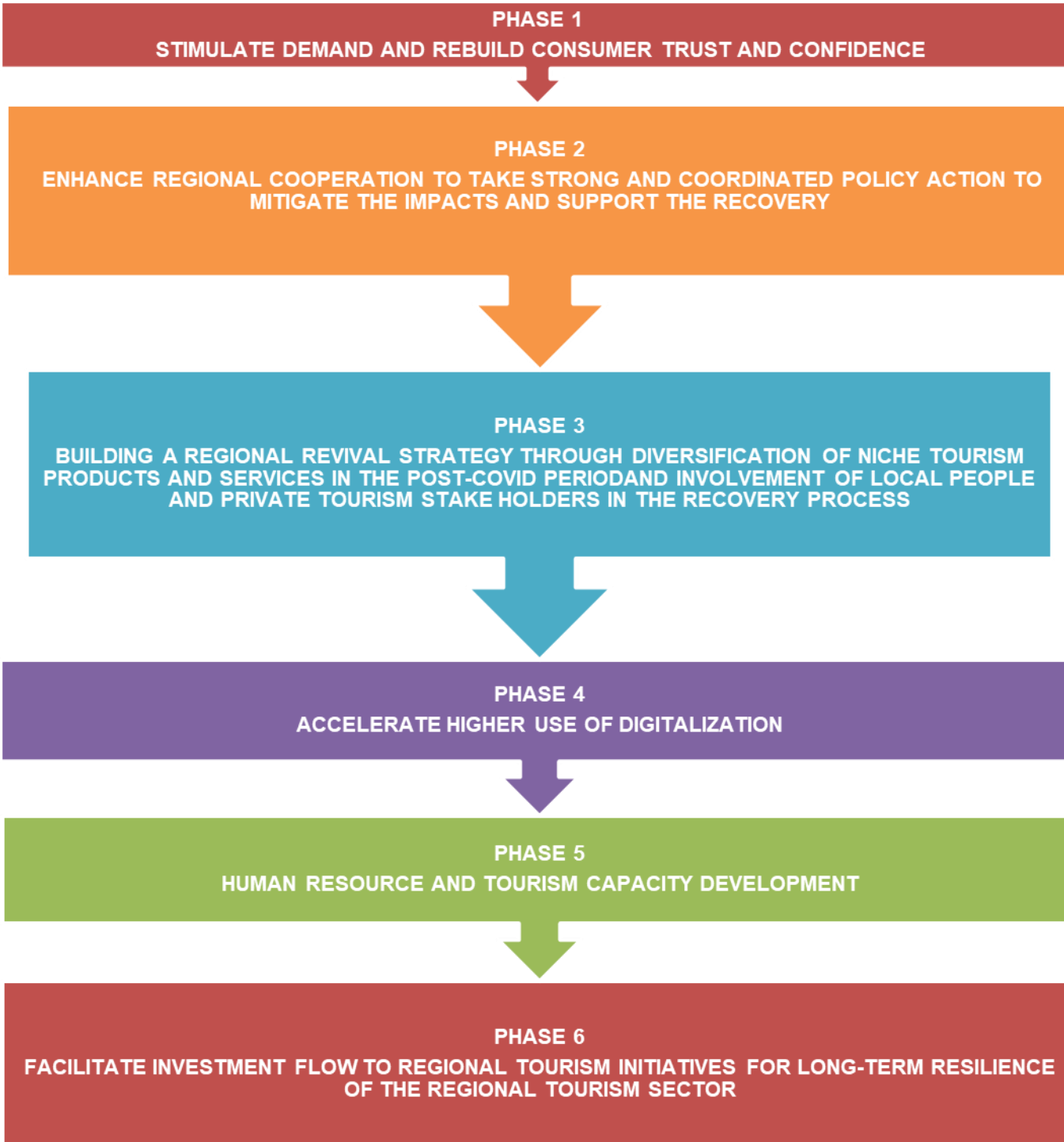
### 3. BACKGROUND

In 2020, Tourism sector has unexpectedly suffered a downturn in the ECO region like the rest of the world due to the prevailing travel restrictions and low demand for travel for fear of infection. The International Air Transport Association (IATA) predicts that global passenger traffic will not return to pre-COVID-19 levels until 2024. The abrupt fall in tourist arrivals in the region has caused economic difficulties and job losses for businesses involved in relevant industries. Based on WTTC 2019 data, following table shows ECO Member States' degree of dependence on tourism based on contribution of tourism and travel sector to GDP (Table 1). Travel and tourism contribution of the countries as a percentage to GDP and employment indicates that there are 4 groups in the ECO region in terms of tourism dependence in their economies. Top Member State in terms of its tourism dependence is Turkey while six other Member States have a major tourism industry. Considering the revival of the tourism sector is crucial for these economies, it is essential that all ECO Member States may stimulate their economies by promoting their tourism potential.

**Table 1: Grouping of ECO Member States Tourism Dependence in terms of Travel and Tourism contribution to GDP and employment (WTTC 2019)**

|  |   |
|--|---|
| Highly Tourism Dependent Member States<br>(more than 10% of the GDP) | Türkiye %11.3   |
| Tourism Dependent Member States<br>(5% to 10% of GDP)                | Azerbaijan %7.2<br>Iran %6.8<br>Kazakhstan %5.2<br>Kyrgyz Republic %8.3<br>Tajikistan %6.4<br>Pakistan %5.9 |
| Member States with major Tourism<br>(2.5% to 5% of GDP)              | Uzbekistan %4.5   |
| Member States with minor Tourism<br>(Less than 2.5% of GDP)          | Afghanistan n/a, Turkmenistan n/a   |

According to international organizations, the outlook for the post-pandemic recovery of the tourism sector is uncertain and will depend on consequences of the economic and health circumstances such as the evolution of the pandemic, availability of a vaccine (or other control measures), and the lifting of travel restrictions, as well as the survival and readiness of businesses throughout the tourism ecosystem to meet demand, impacts on consumer confidence and travel behavior, and developments in the wider global economy. It is estimated that post-pandemic recovery will take place in different stages through a phased approach in which countries will be attempting to balance the health and economic priorities. An analysis on regional policy options and actions for recovery of the tourism sector of the ECO Member States and a six-phase road map for transformation of regional tourism sector is provided below:



## **Phase 1: Stimulate demand and rebuild consumer trust and confidence through adoption of consumer friendly relaxed policies and regional guidelines and safety protocols for travel and tourism professionals, their work environment and the community**

Encouraging tour operators and airlines to develop relaxed booking policies to encourage future holiday bookings during the COVID-19 crisis is essential to enhance consumer trust. Waiving fees if clients want to change travel destinations or trip dates may ease the stress on the consumer side for attempting to plan future trips in the uncertain pandemic conditions. To support and encourage consumers, a regional policy may be developed to guarantee payments in tourism related bookings. Furthermore, implementing adequate health and safety protocols at all points of tourism activities will be key to rebuilding confidence while ensuring the safety and security of travellers, workers and host countries. Collaboration and cooperation between countries will be essential in this regard. As a step to stimulate confidence and demand for travel, designing and implementing regional COVID-19 hygiene certification programs, guidelines and protocols for travel facilities, hotels, taxis, restaurants, and attractions is critical to keep travelers and employees safe and build consumer trust. In an effort to establish a harmonized approach towards setting guidelines around the reopening of the sector, WTTC launched the "Safe Travels" stamp to allow potential travellers to recognize establishments around the world, which have adopted standardized health and hygiene protocols. Backed by the United Nations World Tourism Organization (UNWTO), to put into place safety and hygiene standards in line with international standards to ensure the safe reopening of the Member States to tourists from around the world when travel restrictions begin to ease, the "Safe Travels" stamp may be used across the travel and tourism value chain in the region.

## **Phase 2: Enhance regional cooperation, partnerships and solidarity to take strong and coordinated policy action to mitigate the impacts and support the safe and sustainable recovery**

According to WTTC, the current trends and survey studies of consumer preferences and behavioural patterns, projections on resumption of travel indicate that recovery will be proximity-based, gradually moving from domestic to regional and lastly intercontinental. Tourism professionals agree that domestic tourism will lead the way in the recovery process. Cross-border regional tourism among countries in close proximity will also be another opportunity in the recovery of the sector. As a first step towards recovery, establishing regional coordination among Member States to re-establish effective operations and resume international travel through travel bubbles or corridors, which would allow Member States in the region to put in place safety and hygiene protocols for opening up channels for air and land travel and on a reciprocal basis need to be considered and planned by the national public and private tourism stakeholders including Ministries, tour operators and businesses. ECO Member States who have secured enough vaccine facilities may sort out a convenient way to consider volunteering to offer regional tourists COVID-19 vaccines to attract more tourists to their countries safely amid COVID-19.

### **Phase 3: Building a regional revival strategy through diversification of niche tourism products and services in the post-covid period and involvement of local people and private tourism stake holders in the recovery process**

The behavior trends of the international and local travelers during the Covid 19 pandemic have indicated a shift towards more nature based tourism and outdoor experiences. It is estimated that travelers will be more inclined to visit safer, less crowded and closer destinations increasing the demand for domestic and regional tourism options and open-air and nature-based tourism activities. In that regard by conducting a regional tourism potential analysis, the tourist destinations that could attract demand in the region could be turned into a tour route whereby a tourism package could be prepared collectively for the international and the domestic traveler segments separately with the help of the national tour operators.

The 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. 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 through inclusive tourism programs and appropriate platforms of dialogue.

### **Phase 4: Accelerate higher use of digitalization**

During the COVID-19 pandemic, while global tourism has been forced to slow down, the importance and need for digitalization was predominant. Tourism operators have calibrated their e-commerce presence; tourism businesses and countries on the demand side offered virtual experiences, real-time information to keep the interest live. Museums, destinations, botanical gardens, zoos and various tourism providers have gone online to showcase their assets. Leveraging digital services have proved to be so vital to keep interest, popularity and demand during the pandemic, which may facilitate attract in-person visits when the pandemic is over. In that regard to keep online regional presence, cooperation among the Member States for joint development and enhancement of digitalization in tourism services including a common tourism website involving higher use of automation for direct hotel and tour bookings, contactless payments and services may accelerate tourist arrivals and demand in the ECO region.

### **Phase 5: Human resource and tourism capacity development**

Tourism is a very labour intensive sector. Globally, labor shortages are considered to be the number one barrier to tourism growth. During the pandemic tourism sector has been devastated and lots of jobs have been lost causing workers to shift into different sectors. To address looming labour shortages in the sector, cooperation in the capacity development and training of the unskilled staff is essential to provide quality tourism services and enhance competitiveness of the region. Partnerships in the region could be developed in order to identify the labor needs in tourism sector and ensure a well-trained, customer and service-oriented tourism workforce for the recovery period. The regional tourism industry will most importantly, as a containment step, need to focus on providing its entire staff health, hygiene, and emergency response training.

## **Phase 6: Explore the enhancement of means to facilitate investment flow to regional tourism initiatives for long-term resilience of the regional tourism sector**

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. In order to compensate the decrease in investment in the sector during the pandemic, member States may take active policies to incentivize and restore investment in the tourism sector to maintain the quality of the tourism offer and promote a sustainable recovery. Developing initiatives to facilitate investment into regional tourism projects including a possible ECO regional tourism investment promotion framework, 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 are among possible actions. Publicizing and highlighting 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 may accelerate the flow of investment into the region.

## **4. IMPLEMENTATION, FOLLOW-UP AND REVIEW MECHANISM**

**4.1.** In three months following the adoption of this Road Map on Tourism, the ECO Secretariat will convene a high-level working group (HLWG) to discuss the implementation of the Road Map.

**4.2.** A Monitoring 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 Monitoring 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 Road Map. ECO Member states shall collectively determine the implementation priorities; develop work program or plans, for consideration/approval by ECO decision-making bodies.

**4.3.** There will be annual review reports on the status of the implementation of the Road Map. The review reports, to be prepared jointly by the Monitoring Committee and the Secretariat, should be submitted for consideration to the annual meetings of the ECO Regional Planning Council (RPC).

**4.4.** Secretariat will facilitate work of the Monitoring Committee including their physical and virtual meetings. The CPR will be requested to allocate necessary financial resources from the FGPF and SSF.

**4.5.** The ECO Ministers of Tourism shall supervise, coordinate and monitor the implementation of this Road Map.