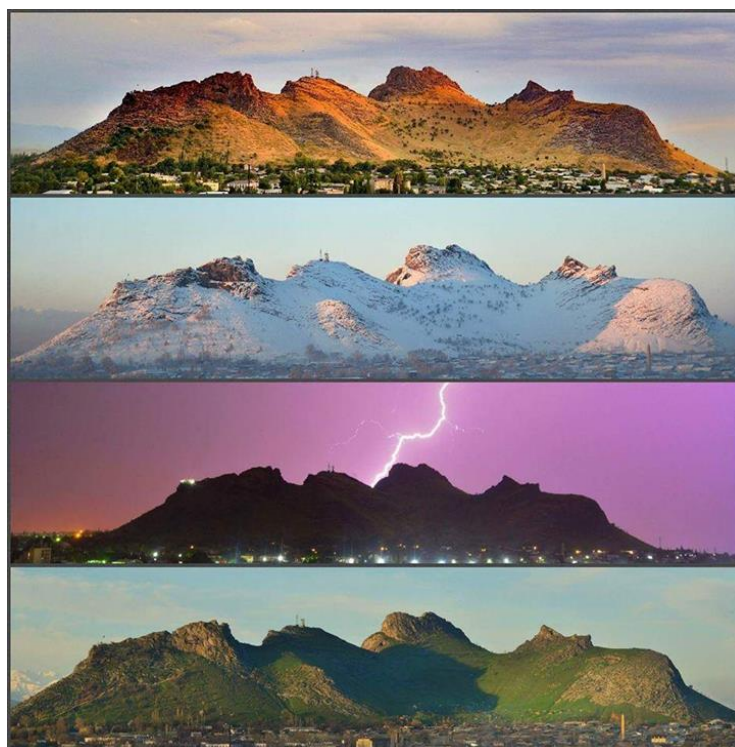




SUSTAINABLE TOURISM DEVELOPMENT STRATEGY AND PLAN FOR THE OSH REGION

COMPLETE VERSION



Ош аймагы - маданияттын ар түрдүүлүгүн сезиңиз!

Ошский регион - ощути разнообразие культур!

Osh Region - Feel Diverse Cultures!

Bishkek – 2023

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**Regional Economic Development Project
(Credit No. 6558 KG, Grant No. D5700)**

**Consulting services for the preparation of the
Sustainable Tourism Development Strategy and Plan for the Osh Region**

**SUSTAINABLE TOURISM DEVELOPMENT
STRATEGY AND PLAN
FOR THE OSH REGION
OF THE KYRGYZ REPUBLIC**

Provided by: ARIS Community Development and Investment Agency	Prepared by: ALE – KCBTA, PF "Central Asia Prospects"
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Bishkek - 2023

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ABBREVIATIONS

No.	Full names	Abbreviations
1.	Asian Development Bank	ADB
2.	Community Development and Investment Agency of the Kyrgyz Republic	ARIS
3.	Department of Tourism under the Ministry of Economy and Commerce of the Kyrgyz Republic	Department of Tourism, DoT
4.	European Bank for Reconstruction and Development	EBRD
5.	European Union	EU
6.	Fund for State Property Management under the Ministry of Economy and Commerce of the Kyrgyz Republic	FUGI under MEC KR
7.	Central Asia	CA
8.	German Agency for International Cooperation	GIZ
9.	Government (Cabinet of Ministers) of the Kyrgyz Republic	GKR
10.	Gross domestic product	GDP
11.	Gross regional product	GRP
12.	Jogorku Kenesh of the Kyrgyz Republic	JK KR
13.	Kyrgyz Association of Tour Operators	KATO
14.	Kyrgyz Community Based Tourism Association	KCBTA
15.	Kyrgyz Republic	KR
16.	Kyrgyz som	KGS
17.	Local government administrations	LGA
18.	Local self-governments	LSG bodies
19.	Ministry of Agriculture of the Kyrgyz Republic	MOA KR
20.	Ministry of Culture, Information, Sports and Youth Policy of the Kyrgyz Republic	MCISYP KR
21.	Ministry of Digital Development of the Kyrgyz Republic	MDD KR
22.	Ministry of Economy and Commerce of the Kyrgyz Republic	MEC KR
23.	Ministry of Emergency Situations of the Kyrgyz Republic	MES KR
24.	Ministry of Finance of the Kyrgyz Republic	MOF KR
25.	Ministry of Health of the Kyrgyz Republic	MOH KR
26.	Ministry of Internal Affairs of the Kyrgyz Republic	MIA KR
27.	Ministry of Natural Resources, Ecology and Technical Supervision of the Kyrgyz Republic	MNRETS KR
28.	Ministry of Transport and Communications of the Kyrgyz Republic	MTC KR
29.	Municipal solid waste	MSW
30.	National Historical and Archaeological Museum Complex “Sulaiman-Too”	Sulaiman-Too
31.	National Bank of the Kyrgyz Republic	NBKR
32.	National Development Program of the Kyrgyz Republic for 2021-2026	NDP KR 2021-2026
33.	National Development Strategy of the Kyrgyz Republic for 2018-2040	NDS KR 2018-2040
34.	National Natural Park	NNP
35.	National Statistical Committee of the Kyrgyz Republic	NSC KR

36.	Normative legal acts	NLA
37.	Organization for Economic Cooperation and Development	OECD
38.	Osh City and Osh Province	the Osh Region
39.	Osh Joint Tourism Development Council	OJTDC
40.	Osh State University	OshSU
41.	Open Joint-Stock Company	OJSC
42.	People's Republic of China	PRC
43.	Persons with disabilities	PWD
44.	Plenipotentiary representation of the President of the Kyrgyz Republic in Osh province	PRP KR in Osh province
45.	Problems	PR
46.	Project "Consulting services for the preparation of the Sustainable Tourism Development Strategy and Plan for the Osh Region" as part of the Regional Economic Development Project financed by the World Bank and implemented by ARIS KR	Project
47.	Promoting energy and resource efficiency in the tourism industry of Kyrgyzstan (project)	PERETO
48.	Renewable energy sources	RES
49.	Small Grants Programs	SGP
50.	State Committee for National Security	SCNS KR
51.	State Historical and Cultural Museum-Reserve"Özgön"	the Uzgen complex
52.	State Service for Regulation and Supervision of the Financial Market under the Cabinet of Ministers of the Kyrgyz Republic	SSRSFM under CMKR
53.	State Border Service under the State Committee for National Security of the Kyrgyz Republic	SBS KR
54.	State Committee for National Security	SCNS KR
55.	State Tax Service of the Kyrgyz Republic	STS KR
56.	Sustainable Tourism Development Strategy and Plan	STDSP
57.	Tourism Development Program of the Government of the Kyrgyz Republic for 2019-2023	TDP 2019-2023
58.	Tourism Development Program of Osh city "Osh - Silk Road provider"	TDP "Osh-Silk Road provider"
59.	Sustainable Development Strategic Plan for Chong-Alay district of Osh province, 2022-2026	SDSP 2022-2026
60.	Sustainable Development Strategic Plan for Nookat district of Osh province, 2018-2023	SDSP 2018-2023
61.	Tourism Development Strategy for the Alay Valley until 2027	TDS until 2027
62.	Tourism Development Support Fund of the Kyrgyz Republic	TDSF KR
63.	United Nations Development Program	UNDP
64.	United Nations Food and Agriculture Organization	FAO
65.	United Nations World Tourism Organization	UNWTO
66.	World Bank	WB
67.	World Economic Forum	WEF
68.	World Tourism and Travel Council	WTTC

INTRODUCTION

The history of Kyrgyzstan's tourism industry has more than one decade. Starting from the second half of the 20th century, Lake Issyk-Kul in the north of the republic has firmly cemented its reputation as one of the flagships of domestic tourism in the Soviet Union. It was here that capacious boarding houses, children's health camps and sanatoriums of all-Union significance were built. The southern region of Kyrgyzstan with its center in Osh was mostly left out of these large-scale processes. And even today, when increased attention is paid to the catching-up development of the southern regions of the country, the tourism industry of the Osh Region¹ continues to be financed by a leftover principle.

The Regional Economic Development Project, launched by the ARIS with the financial support of the World Bank Group, aims to reduce imbalances in the development of the Osh Region by increasing the contribution of tourism to the local economic development. One of the components of this project is the programming of a regional Sustainable Tourism Development Strategy and Plan (STDSP), which also includes a priority investment program, marketing and branding strategies, as well as the organization of capacity-building activities for regional tour operators and other tourism-related stakeholders.

According to local tour operators and industry experts, along with chronic underfunding, the tourism sector² of the Osh Region today faces several other *systemic challenges* that complicate its sustainable development and hinder the improvement of the quality of services provided. These are as follows:

- low recognition of the region in the global tourism market;
- lack of effective intersectoral cooperation in supporting small and medium-sized businesses;
- low level of human capital development.

In developing this strategic document, the project consultants aimed to study the tourism sector of the Osh Region through the prism of existing problems and untapped opportunities, focusing on the search for sustainable forms of tourism development that can bear fruit in the next five years - from 2023 to 2028. In doing so, there were three questions that needed to be answered in-depth.

- What is the current state of the tourism sector?
- What should it be like in 2028?
- How to achieve these goals?

This research project allowed the project team to:

- understand where the regional tourism sector is now in terms of modern international standards;
- assess its development potential and key "pain" places;
- identify reference points for its strategic development;
- propose a set of specific investment, marketing and communication activities necessary for the progressive development of the tourism sector in the Osh Region.

The developers of this document proceed from the fact that the Strategy should become a handbook for state bodies and local administrations of the Kyrgyz Republic responsible for the development of tourism in the Osh Region. Representatives of the tourism business, in addition to partner participation in its implementation, should help to ensure monitoring and evaluating of the progress towards its planned strategic goals.

¹ The project consultant decided to consider Osh province and the city of Osh together, introducing the term "the Osh Region" for the purposes of this study.

² The terms "industry" and "sector" used in the study are identical in their meaning in relation to tourism. The same applies to the use of the words of "destination", "location" and "object".

RESEARCH METHODOLOGY

Compositionally, the STDSP is an interpretive study based on the inductive method of working with information. This approach involves the collection of data, its subsequent processing, and a comprehensive analysis. The saturation of all kinds of information and a detailed dive into the problems allowed the consultants to take a fresh look at the tourism sector of the Osh Region and develop a strategic vision for the prospects of its further development. In turn, based on this vision, the main areas of growth of the region's tourism industry were identified and a list of practical measures to build capacity in its individual sub-sectors was proposed.

The work on the document consisted of several stages. At *the first stage*, consultants made connections with all stakeholders, including:

- national authorities in charge of the tourism sector, as well as state administrations of the Osh Region at the regional, city and district levels;
- national and regional tourism associations and operators;
- local communities, including individual businessmen implementing their own tourism projects in the region;
- international organizations and donor countries providing technical assistance for tourism development in the south of Kyrgyzstan.

The *second stage* involved the collection of information through official inquiries, diagnostic interviews, expert evaluations, field studies, as well as the formation of a statistical database from official sources. In parallel, there was a study of collected information using different types of analysis (SWOT-analysis, comparative analysis, organizational analysis, abstract modeling, etc.), which allowed to assess the current state of tourism sphere in the Osh Region both in terms of external (strategic documents, laws, institutions and other aspects of the national level) and internal (aspects of the regional level) business environment. Also at this stage, the whole set of problems in the development of the regional tourism sector was identified.

The third stage of work can be called conceptual. Within its framework, the identified problems were prioritized. Subsequently, based on the results of brainstorming sessions with the project consultants and invited experts, ways of solving them and/or mitigating their negative manifestations were identified. Many of the developments were presented by the consultant to the main stakeholders of the project to collect feedback, critical comments and additional suggestions. This scheme of interaction has allowed the most objective assessment of the feasibility of the proposed initiatives and come close to the formation of a logically verified action plan for the development of sustainable tourism in the Osh Region.

Structurally, the STDSP consists of 3 large chapters divided into paragraphs.

The first chapter "*Situational Analysis of the Regional Tourism Sector*" is devoted to the analysis of the current state of the regional tourism industry through consideration of its individual sub-sectors (state administration, economy, transport, museum affairs, marketing, human resources) and problem fields (regulatory, monitoring, ecology, safety). In addition, the chapter provides a general assessment of the tourism potential of the Osh Region, identifies the main types of tourism with prospects for development, provides a SWOT-analysis of the tourism sector. On the basis of field research and analytical processing of the collected data, a comparative analysis of the pilot destinations proposed by the expert community to study the characteristics of the tourism sector of the Osh Region is carried out.

The second chapter "*Strategic Vision for the Sector Development*" defines the role and place of the Osh Region in the context of global and regional trends in tourism, systematizes the problems that hinder its sustainable development, and sets targets for the sector for the period until 2028. A separate block of paragraphs of the chapter is devoted to a description of innovative approaches and main tourism vectors, acceptance of which, according to the consultant, could make the development of the Osh Region tourism sector more sustainable and progressive.

The third chapter "*Package of Measures for the Sector's Sustainable Development*" acts as a policy document of the STDSP and includes a list of targeted measures and interventions recommended for adoption in the period from 2023 to 2028 at the national and regional levels to improve and modernize the tourism industry in the Osh Region, to give it sustainable forms of functioning and growth. Structurally, it consists of a priority investment program, a marketing strategy with a program of relevant activities, a commercialization plan for individual tourist destinations, recommendations for the tourism industry on communications policy, as well as a 2023-2028 general action plan for the STDSP implementation.

CHAPTER 1. SITUATION ANALYSIS OF THE REGIONAL TOURISM SECTOR

1.1. Tourism potential of the Osh Region

Taking into account the geographical, climatic, historical and cultural peculiarities, the Kyrgyz Republic in terms of tourism can be divided into conditional two macro-regions: the northern region comprising Chui, Talas, Issyk-Kul and Naryn provinces, and the southern one, which, respectively, includes Jalalabat, Osh and Batken provinces.

An analysis of the tourism development in these two macro-regions of Kyrgyzstan allows us to conclude that *the northern region is characterized by pronounced nomadism*. Due to the colder and wetter climate, the nomadic culture in this macro-region is represented more vividly and prominently. Some natural isolation of this macro-region, as well as proximity to other nomadic peoples of Greater Central Asia, have shaped the culture and life of local people. This is reflected in the culture, cuisine, philosophy, and hence in the features of the tourism development.

At the same time the embodiment *of the southern macro-region are the cities of the Silk Road*, and in a broader sense - *the culture of the Turkic-Persian East*. Warmer climate, the presence of plains, ethnic diversity, active trade relations with the sedentary peoples of present-day Uzbekistan, Tajikistan and Eastern Turkestan, as well as the legacy of ancient states of Maverannahr and Fergana in these territories have left an indelible mark on the culture and life of this region. Historically the Osh Region developed as a multiform territory, combining elements of both nomadic and sedentary cultures of Central Asia peoples.

The undisputed center of the southern macro-region, its economic, transport, cultural and political core is the Osh Region comprising Osh province and the city of Osh.

The city of Osh is located on the southeastern outskirts of Ferghana Valley, at the exit of the Ak-Buura River from the foothills of the Alay Range. The city is surrounded on three sides by the spurs of this ridge and is located at an altitude of 700-1000 m above sea level. According to the official opinion, the history of Osh is about 3,000 years old. The origin of the city is associated with the settlement of ancient farmers of the Bronze Age, found on the southern slope of Sulaiman-Too Mount.

Osh is the second largest city in the country after Bishkek and one of the largest cities in Fergana Valley. There is an international airport with connections to a dozen countries; its services, in addition to Kyrgyz citizens and guests of the city, are also actively used by citizens of neighboring Uzbekistan and Tajikistan. The city is home to the offices of many ministries and departments of the Kyrgyz Republic that oversee the entire southern region. As of January 1, 2022 there were 333.6 thousand people in Osh, including 11 suburban villages subordinated to the city. Its total area 182 km².

Osh province is located in the southern part of the Kyrgyz Republic and borders in the west with Batken province, in the north with Jalalabat province, in the northeast with Naryn province, in the east with China, in the south with the Republic of Tajikistan, in the northwest with Republic of Uzbekistan. The relief of most of the territory of Osh province, its northern, eastern and southern parts, is formed by mountain systems.

According to the NSC KR, as of January 1, 2022, 1 million 414.7 thousand people lived in Osh province. The total area of the region is 29.0 thousand km², or 14.5% of the territory of the Kyrgyz Republic. The administrative center of the province is the city of Osh. The province includes 7 districts, which, in turn, consist of 88 aiyl aimaks and 3 cities of district significance:

1. Alay district with a center in Gulcha village;
2. Aravan district with the center in Aravan village;
3. Kara-Kulja district with the center in Kara-Kulja village;
4. Chong-Alay district with the center in Daroot-Korgon village;

5. Kara-Suu district with the center in Kara-Suu town;
6. Nookat region with the center in Nookat town;
7. Uzgen district with the center in Uzgen city.

The analysis of projects carried out in recent years, scientific articles on the tourism industry of Kyrgyzstan³, the study of the websites of international and national operators (orexca.com, tripadvisor.com, centralasia-travel.com, caravanistan.com, advantour.com, visitalay.com, cbtkyrgyzstan.kg), as well as the site-visits of consultants made to the region, allow to identify the following **key tourism directions of the Osh Region**, which have a comparative advantage in attracting domestic and international tourists:

- Cultural tourism;
- Nature and adventure tourism;
- Gastronomic tourism.

It is important to note here that in the world tourism market, Kyrgyzstan is primarily associated with impressive mountain peaks and lakes, an original culture of nomads - in general, the tradition of nomadism. By all accounts, Issyk-Kul and Naryn provinces are the central locations where one can get acquainted with the mentioned authentic features of the republic. At the same time, Osh and its surroundings are perceived even by the inhabitants of the republic as "the territory of Muslim East" and "the Gastronomic mecca of Kyrgyzstan". It is this orientalism that is the hallmark of the region and that is what arouses interest of domestic and many foreign tourists.

At the same time, tourist advantages of the region are not limited to Osh city. Most of the Osh Region is located in the spurs of two greatest mountain systems of Central Asia - the Tien Shan and the Pamir-Alay, thereby opening wide horizons for the development of active and extreme types of tourism.

Cultural tourism in the Osh Region

Due to the inextricable connection with the culture of the ancient and medieval states of Maverannahr and the history of the Silk Road, the Osh Region is of interest from the point of view of cultural tourism.

As a segment of the tourism market, cultural (educational) tourism usually involves short-term trips (2-3 days), during which a tourist visits one or more cities, gets acquainted with their history, culture, sights, sometimes with the traditions and customs of local residents, as a result of which receives not only pleasant impressions, but also joins the material and spiritual values of various countries and peoples.

The history of the cities of Osh and Uzgen, located in the region, is inextricably linked with the Silk Road - a transcontinental trade route that connected China, Japan and India with the countries of the West, whose dawn fell on the High Middle Ages. The Fergana branch of the Silk Road passed through the mentioned cities, which was reflected in the strong merchant traditions of local communities.

³SIAR Research&Consulting (2012) *A Study of Kyrgyzstan's Travel Industry*, analytical report, [Online]. Available at: <http://siar-consult.com/wp-content/uploads/Issledovanie-turisticheskoi-otrasli-24.12.12.pdf> (In English).

USAID (2014) *Tourism Development in Kyrgyzstan*, annual report, [Online]. Available at: https://pdf.usaid.gov/pdf_docs/PA00K45Q.pdf (In Russian).

Jenish, N. (2017) *Tourism Sector in Kyrgyzstan: Trends and Challenges*, working paper 42, Bishkek: University of Central Asia [Online]. Available at: <https://www.ucentralasia.org/media/bytfagur/uca-ippa-wp42tourismeng.pdf>

The city of Osh has a reputation as one of the religious centers of Central Asia. This is largely due to the legends about Sulaiman-Too⁴ - the hallmark of the city. According to historians, since the 10th century, pilgrims from all over Asia have been drawn to this rocky hill, since it was believed that it was here that the prophet Sulayman turned to God. Ancient Osh was famous for its bazaars and caravanserais. The main one, called the Central Bazaar (in the reference books – Jaima Bazaar) and located on the banks of the Ak-Buura River, has even survived to this day.

In terms of its historical significance, another settlement of the, the city of Uzgen, can compete with Osh. The date of its origin dates back to the 1st-2nd centuries BC. The dawn of Uzgen fell on the 11-12th centuries, when for some time the city was the capital of the medieval state of the Karakhanids, which included vast territories of Western and Eastern Turkestan. The main attraction of the city is the architectural complex of the Karakhanid dynasty, built in the early 12th century.

Other smaller and less well-known historical sites of interest to tourists include:

- ruins of Kushan and Davan settlements;
- historical mosques;
- caravanserais;
- sites of ancient hunters and burial grounds;
- cave drawings.

In addition, the Osh Region is extremely rich in sacred places, which annually attract thousands of local and foreign pilgrims. According to the Aigine Cultural Research Center⁵, there are 151 sacred objects in the region ⁶. The most famous of them are: a complex of caves, stones and Babur's house on Mount Sulaimon-Too, a waterfall, springs and a cave in Abshyr-Ata (Nookat district), as well as the Duldul-At place, which includes petroglyphs of ancient Davan horse breeders, a mosque and a spring in Aravan district.

Nature and adventure tourism

In contrast to the cultural and educational tourism, this direction has relatively recently become popular in the mass segment and has a high potential for growth. This is largely due to the interest in it on the part of young people, who, more than other cohorts, are focused on active types of recreation, as well as the growing level of public concern about sustainable development and environmental issues. The advantage of this type of tourism is also its higher unit profitability for tour operators and local communities.

Nature and adventure tourism is a niche type of tourism, involving both short-term (1-2 days) and long-term stays (up to 2-4 weeks) in relatively untouched natural areas and remote rural areas. Quite often it combines ecological, ethnic (rural) and sports types of travel. In a modern interpretation, this type of tourism is based on the principles of sustainable development, respect for the environment, its preservation and study.

The natural and geographical features of Kyrgyzstan are unique in many respects and provide excellent opportunities for *mountaineering*. The origin of this active, high-risk type of tourism dates back to the 1930s, when alpine camps began to open in the Tien Shan and Pamir-Alai with the support of the state.

One of the legendary "seven-thousanders", Lenin Peak (7,134 m), the highest point of the Chon-Alai Range, is situated in the Osh Region. Since the early 1990s, this peak, along with other

⁴A description of the main tourist destinations is given in Appendix 1a.

⁵Aigine Cultural Research Center (2020) *National Guidelines for the Preservation of Sacred Sites, Pilgrimage Practices and Rituals*. Bishkek: Maxprint, 258 p. (In Russian)

⁶Sacred places are areas of land and water, buildings and objects that have divine properties in the minds of local residents.

mountain peaks in the region has become a popular international tourist destination, attracting thousands of climbers (about 3-5 thousand) from all over the world every year.

In addition to climbing mountain peaks, foreign travelers visiting the region are also offered a wide range of other forms of active tourism in the Kozho-Kelen valley and in the area around Lake Tulpar-Kul. They include *trekking, hiking, camping, mountain auto, motorcycle, bike and/or photo tours, as well as speleotourism*.

Ecotourism can also be attributed to the number of emerging tourist destinations in the Osh Region. This type of tourism involves visiting natural areas unaffected by anthropogenic impact in order to explore and enjoy wildlife while preserving their environmental sustainability. On the territory of Osh Region there are national parks Kara-Shoro and Kyrgyz-Ata, as well as Kulun-Ata State Reserve. The issues of visiting these destinations by tourists are not yet regulated at the legislative level.

Another popular destination, which can be attributed to both nature and cognitive tourism, is *ethnotours*. As a rule, they involve short-term (1-2 days) visits to yurt camps spread over alpine meadows in mountain gorges, passes (Sary-Oy, Chyirchyk, etc.) for the purpose of rest and acquaintance with the culture and life of the Kyrgyz people. The promotion of this direction involves the active involvement of local communities, their labor and manufactured products, and represents community-based tourism, i.e., creates conditions for regional and rural development. In recent years, this type of tourism is also in growing demand from the residents of the Osh Region.

Gastronomic tourism in the Osh Region

The Osh Region is traditionally famous for its delicious food. Due to its location in the central part of the Turkestan subcontinent (at the junction of the Central Asian Region and the Xinjiang Uygur Autonomous Region of China), it has absorbed the culinary traditions of the Kyrgyz, Uzbek, Uighur and Dungan peoples. Restaurants and cafes serving the cuisines of these peoples are widely represented in Osh and Uzgen.

This type of tourism implies that that travelers go to a particular country and get to know its culture, including through acquaintance with local cuisine. At the same time, food is perceived as a cultural unit, inextricably linked with the history, religion, legends and customs of the region visited. Conventionally, gastro tours can be divided into urban and rural (they are also "green"). In the first case, it is usually a visit to the shops for the production and processing of food, followed by their tasting. "Green" gastro tours focus on organic products and involve, for example, collecting wild berries in the forest, vegetables and fruits on farms.

A separate place in the gastronomy of the Osh Region is occupied by traditional *Osh and Uzgen teahouses* - "Farkhad", "Caravan", "Nookat" and others. Tea drinking in the East, tea meals are a unique tradition in the culture of many eastern peoples. Chaikhana has long been a place where people came to tell and listen to the latest news and rumors (when there were no newspapers and telephones), play backgammon with neighbors, hold business negotiations, celebrate significant events.

The Osh Region has a great potential for the development of gastronomic tourism, mainly as an integral element of tours focused on cultural-historical and nature-adventure tourism. It is important that successful practical developments in this direction already exist. So, at present, tourists visiting Osh are offered "rice" tours in Uzgen district, which include trips to rice fields, an ancient rice mill, participation in cooking pilaf, and, of course, its tasting.

1.2. Role of destinations in the regional tourism development

One of the important events, the starting point in the preparation of this document, was a meeting of the consultants with leading tourist operators of the Osh Region in June 2022. It was held in the format of a focus group discussion. During the meeting, tour operators were invited to express their views on the main problems of Osh Region's tourism sector, to identify its strengths and weaknesses. As a result of this discussion a SWOT-analysis of the region's tourism industry was made (see Table 1. In addition, the information about the region's main tourist destinations can be found in Appendix 1a).

The meeting also raised the issue of tourism destinations' potential: which of them could be considered established, and whose potential has not yet been fully disclosed. Ultimately, the speakers agreed that the most obvious *criterion for evaluating the destinations' potential* is their profitability. Among the profitable locations, that is, generating income on a systematic basis by attracting a significant number of tourists, tour operators confidently attributed only 3 destinations: Lenin Peak (Chong-Alay), the Lake Tulpar-Kul area (Alay and Chong-Alay), the Kojo-Kelen Valley (Kara-Suu). With some stretch, this list includes the Chyiyrych pass (Kara-Suu), the Abshyr-Ata waterfall (Nookat), the rice mill (Uzgen), and Sulaiman-Too (See Map 1).

As one can see, almost all "earning" destinations are locations of the adventure tourism segment, focused mainly on foreign tourists. The city of Osh is represented by only 1 object - its main attraction, Mount Sulaiman-Too. According to tour operators, this is due to the fact that the city is not sufficiently promoted in the eyes of foreign tourists, travelers mainly use it as a "transshipment base" for an overnight stay before the next stage of the tour. All other destinations, as a rule, attract sporadic, casual tourists, or travelers who go there for a specific purpose. For this reason, they should rather be classified as destinations with untapped potential.

In addition, during the discussion and as a result of an exchange of opinions with tour operators, a list of the main tourist locations in the Osh Region was determined (see Map 1). According to the tour operators, there are about 17 tourist destinations (locations) that are of interest in terms of tourism development in the region. Conversely, during meetings in the state administrations of Osh province, its districts and the city of Osh in May 2022, representatives of the regional authorities identified 20 locations for tourism promotion. Based on the results of comparing the list of tour operators and the list of regional authorities, as well as additional consultations with "Aigine" (Cultural Research Center), the consultants have decided for a substantive study of tourist destinations' characteristics in the Osh Region to focus on *14 pilot destinations* (the geography of the pilot destinations is presented on Map 2, and their detailed profiles are in Appendix 1b).

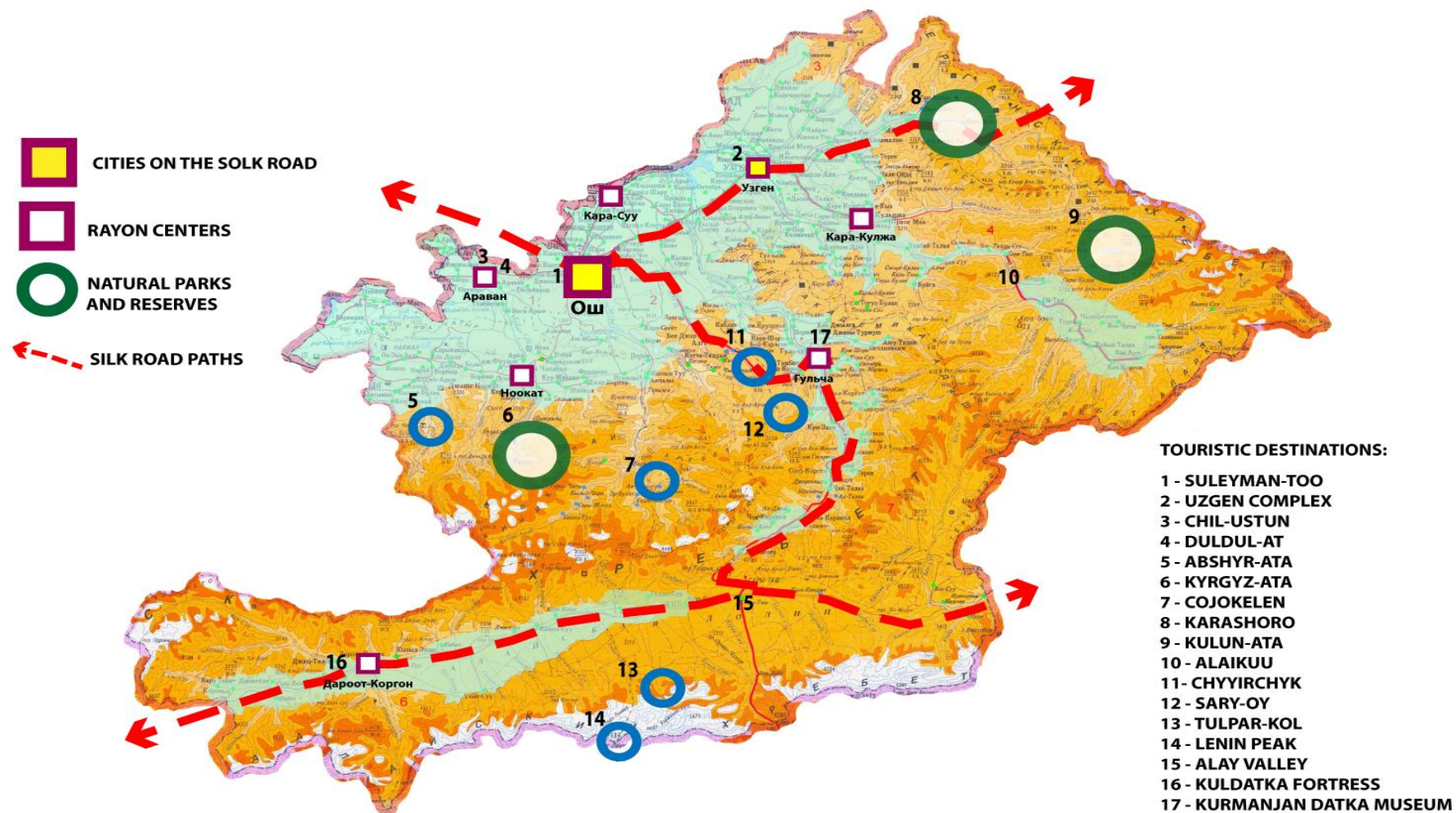
In order to comprehensively study these locations, based on the current standards of the Global Sustainable Tourism Council (GSTC)⁷, the consultants have developed criteria for their evaluation. Thematically, the criteria are divided into 4 blocks, namely, the factors of "Management", "Economy", "Culture", and "Ecology". Each of the factors consists of 3-17 components. The detailed methodology for this analysis can be found in Appendix 1c.

Based on this methodology, the consultants prepared a checklist, which became the main tool for assessing destinations. At each location, meetings were held with owners/responsible employees or representatives of local administrations on whose territory the destinations are located. During these conversations, the consultants were able to ask questions of interest to them, conduct a substantive survey and exchange contacts with interlocutors, as well as fill out checklists.

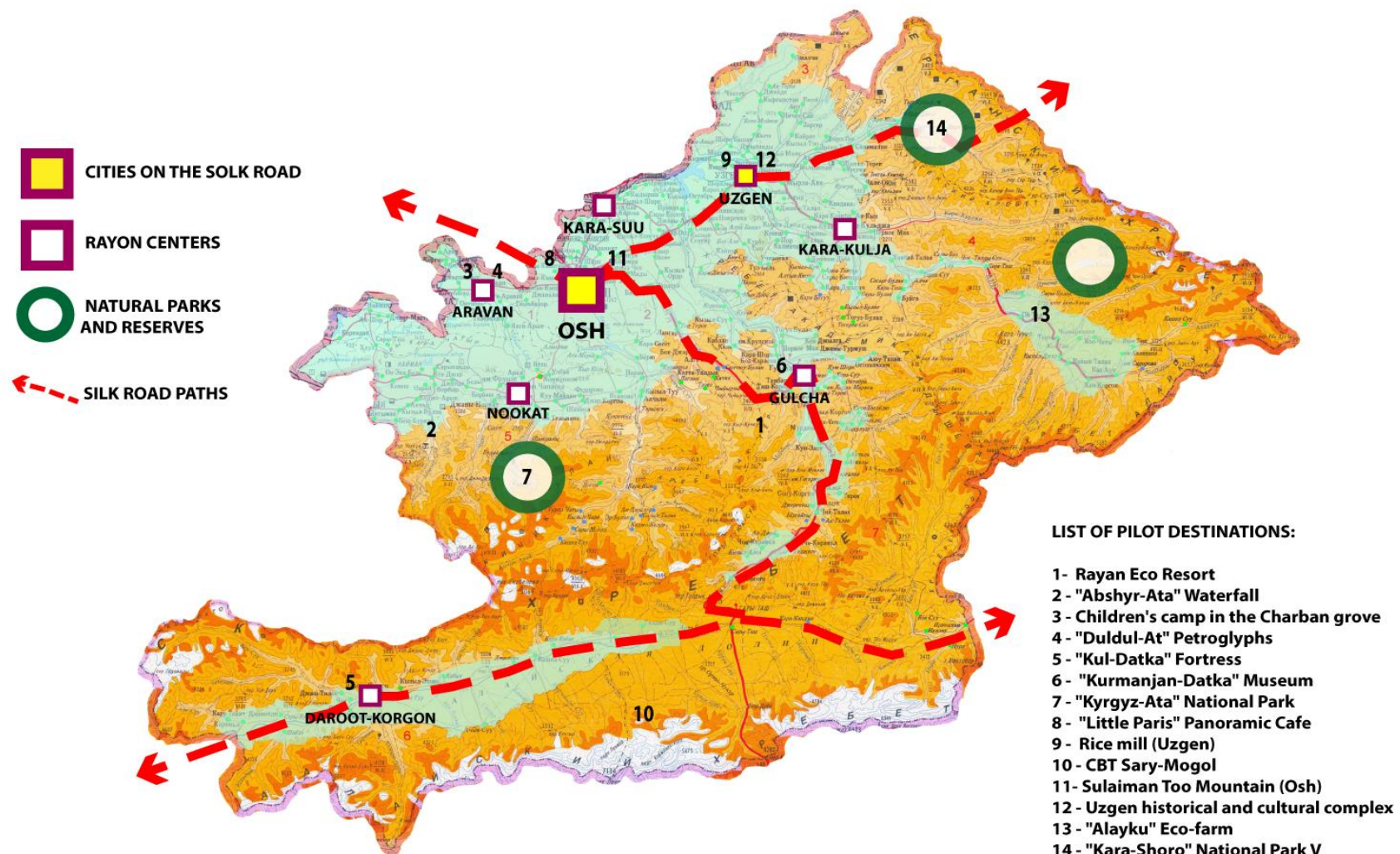
⁷GSTC (2019) *Destination Criteria*, [Online]. Available at: <https://www.gstcouncil.org/wp-content/uploads/GSTC-Destination-Criteria-v2.0.pdf>

Table 1. a SWOT analysis of the tourism sector of the Osh Region

<i>Internal factors</i>	
STRENGTHS	WEAKNESSES
<p>1. Impressive mountain landscapes (a number of seven-thousanders, including the legendary Lenin Peak, a great variety of alpine meadows, high mountain lakes)</p> <p>2. A large number of diverse tourist destinations, including those with untapped potential</p> <p>3. Rich intangible cultural heritage (nomadism, urban crafts, many sports games)</p> <p>4. Culinary diversity of the East (Kyrgyz, Uighur, Uzbek cuisines are widely represented)</p> <p>5. Ready tourist brand Osh city – “Osh – Silk Road Provider”</p>	<p>1. Weak brand awareness and image of the region, even nationwide</p> <p>2. Underdeveloped infrastructure</p> <p>a) the hotel stock is mostly not higher than 1-2 stars</p> <p>b) average and below average road quality</p> <p>c) lack of stable drinking water supply in most locations</p> <p>d) poor navigation support (signs, advertising)</p> <p>e) low level of access to sewerage (cold toilets prevail)</p> <p>f) low level of waste disposal, poor environmental awareness</p> <p>3. Low institutional level</p> <p>a) little experience in differentiating tourism products oriented to the most attractive market segments</p> <p>b) weak coordination between the public and private sectors</p> <p>c) high staff turnover in administrations and destinations</p> <p>d) limited capacity to practice social responsibility and preservation of tourist sites</p>
<i>External factors</i>	
OPPORTUNITIES	THREATS
<p>1. Favorable transit geographic location</p> <p>a) proximity to the main centers of the Ferghana Valley (Kokand, Khujand, Ferghana, Namangan, Margilan)</p> <p>b) the region is part of the Pamir Highway (Osh-Khorog road)</p> <p>c) growing interest and recognition of the Silk Road</p> <p>2. Growing number of industry enthusiasts, specialized travel companies, donor support</p> <p>3. Global trends in tourism, when travelers are looking for new and unusual forms of recreation and entertainment</p>	<p>1. Socio-political instability</p> <p>a) frequent change of political management teams</p> <p>b) lack of continuity, weak institutional memory</p> <p>c) tourist safety issues</p> <p>2. Impact of global crises (pandemics, financial collapses, etc.)</p> <p>3. Degradation of the environment (climate change, environmental degradation)</p>



Map 1. Main tourist destinations of the Osh Region



Map 2. Pilot tourist destinations

The data reflected in these checklists formed the basis of statistical analysis. As a result of these calculations, a Priority Index of all factors (I) was constructed, which determined the Rating of pilot destinations (see Table 2). In particular, this table shows that the Kurmanjan-Datka Museum currently has the strongest potential, whereas the Children's Camp has the weakest one.

Table 2. Rating of pilot tourist destinations		
No.	Tourist destinations	I
1.	Kurmanjan-Datka Museum (Alay)	4.1
2.	Sulaiman-Too (Osh)	3.7
3.	CBT Sary-Mogol (Alay)	3.5
4.	Rice mill (Uzgen)	3.4
5.	Eco-farm Alaiku (Kara-Kulja)	3.4
6.	Waterfall Abshyr-Ata (Nookat)	3.0
7.	Duldul-At (Aravan)	3.0
8.	Fortress Kul-Datka (Chong-Alay)	2.9
9.	the Uzgen complex	2.9
10.	Rayan Eco Resort (Alay)	2.4
11.	Kara-Shoro National Park (Uzgen)	2.0
12.	Panorama "Paris" (Osh)	1.6
13.	Kyrgyz-Ata National Park (Nookat)	1.5
14.	Children's camp in the Charban grove (Aravan)	1.4

A comprehensive assessment of 14 pilot destinations, in addition to determining their rating, also made it possible to conduct a comparative analysis of the level of mutual influence of individual components of the factors "Management", "Economy", "Culture" and "Ecology". This analysis, in turn, helped to identify typical problems of destinations, formed by the internal environment of their functioning, and also made it possible to determine the causes of their occurrence in the external environment (see Fig. 1).



Figure. 1. Tourist destinations in the external environment

The results of the comparative analysis were reflected in the study of various aspects of the functioning of the tourism sector in the Osh Region, which are given further in the text of the document.

1.3. Place of tourism in socio-economic development

Tourism in the Kyrgyz Republic is a priority sector of the national economy. This, in particular, is stated in the long-term strategic document document– the National Development Strategy for 2018-2040: "... the tourism industry makes a significant contribution to the sustainable development of the national economy, employment and income growth of the population, stimulates the development of tourism-related industries and spheres, the inflow of domestic and foreign investments".

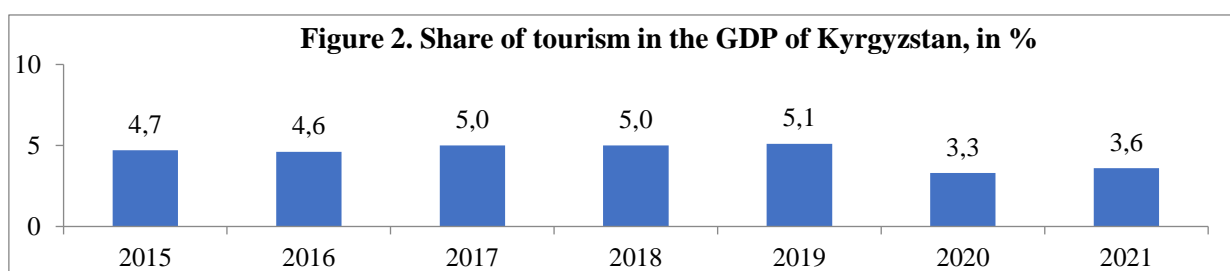
Kyrgyz Republic. The recognition of Kyrgyzstan in the world tourism market as a country that provides ample opportunities for recreation and travel is growing every year. According to the Travel and Tourism Competitiveness Index compiled by the World Economic Forum (WEF) analytical group, in the period from 2015 to 2021 Kyrgyzstan rose from 116th to 90th place (see Table 3).

In 2019, the international publishing house "Lonely Planet" included the republic in the list of 10 best countries for travel. Kyrgyzstan took the 5th place in the ranking, the top three of which were headed by Sri Lanka, Germany and Zimbabwe.

Table 3. Place of Kyrgyzstan on the WEF Tourism and Travel Competitiveness Index (measured every two years)

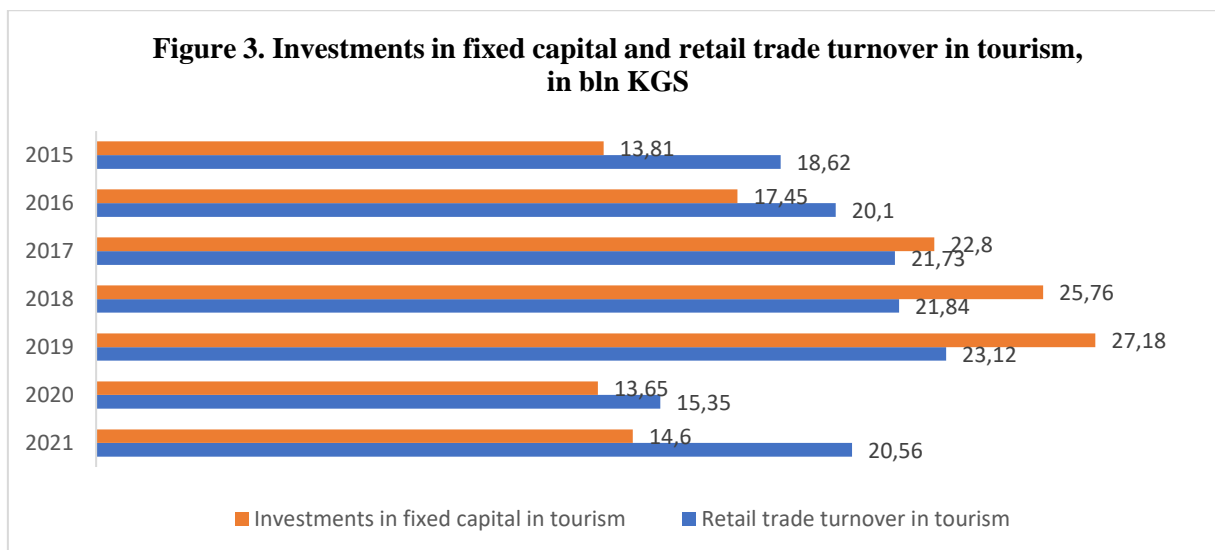
Place in the ranking	2015	2017	2019	2021
Kyrgyzstan	116	115	110	90
Kazakhstan	85	81	80	66
Tajikistan	119	107	104	92

According to the NSC KR, the contribution of tourism to the republic's GDP from 2015 to 2019 gradually increased from 4.7% to 5.1%. Such positive dynamics allowed the Kyrgyz Government in the "Tourism Sector Development Program of the Kyrgyz Republic for 2019-2023" to make an optimistic forecast and set a goal to increase the share of tourism in GDP up to 7% by 2023.

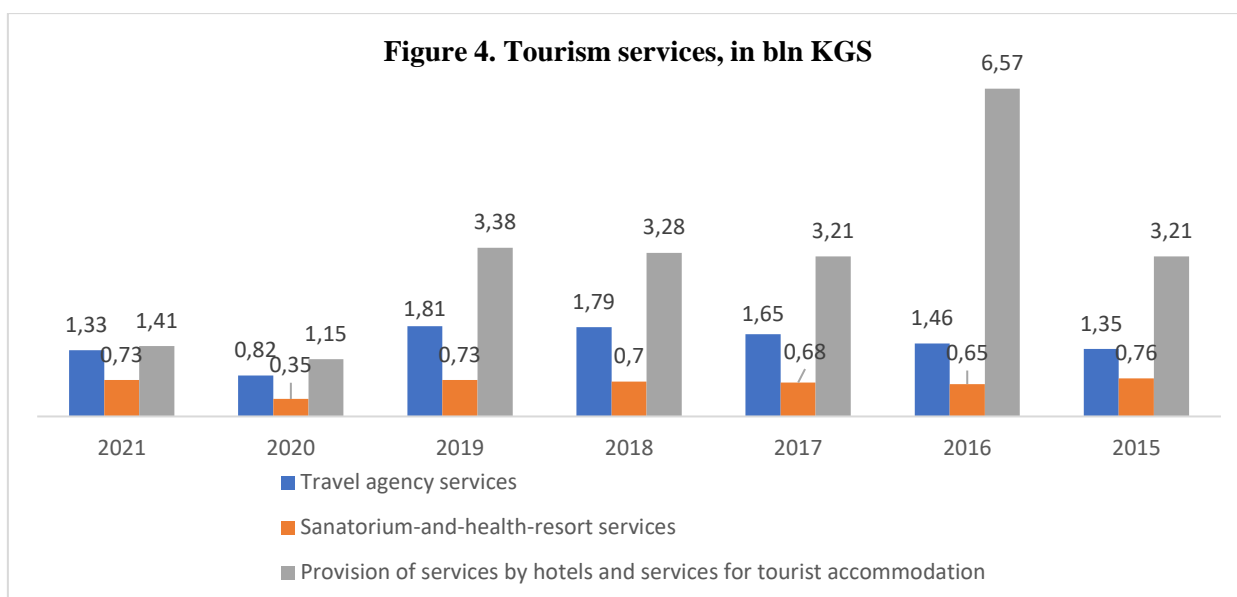


The *COVID 2019 pandemic* was a serious hindrance to achieving these figures, which caused the indicator in question to drop to 3.3% in 2020 and to rise slightly to the 3.6% level by the end of 2021 (see Fig. 2).

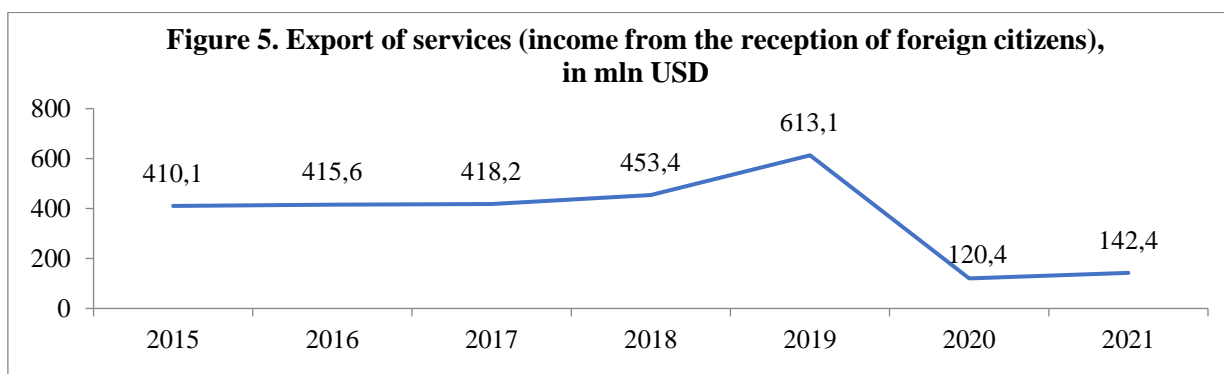
Similarly, COVID-2019 influenced other indicators characterizing the tourism sector. In particular, the flow of "Investments in fixed capital in the field of tourism", dynamically grown from 13.81 KGS bln in 2015 to 27.18 KGS bln in 2019, fell sharply to 13.65 KGS bln in 2020 and only slightly increased to 14.6 KGS bln in 2021. The same trend of growth, decline and gradual recovery is typical for the indicator "Tourism retail trade turnover" (see Fig. 3).



The same was observed in the dynamics of changes in the volume of different types of tourist services in the country (see Fig. 4).

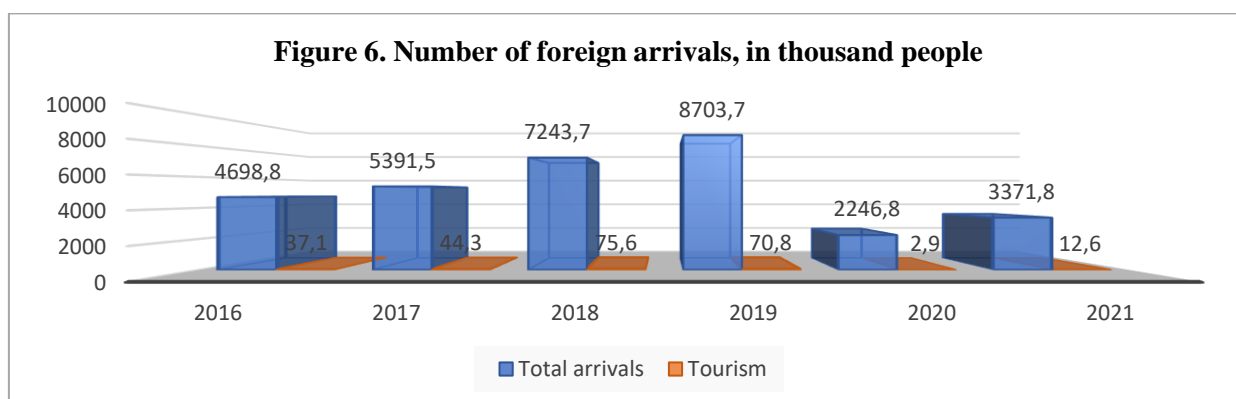


The promotion of exports of tourism services to foreign markets, which is defined through the income from the reception of foreign citizens, developed according to a similar scenario (see Fig. 5).



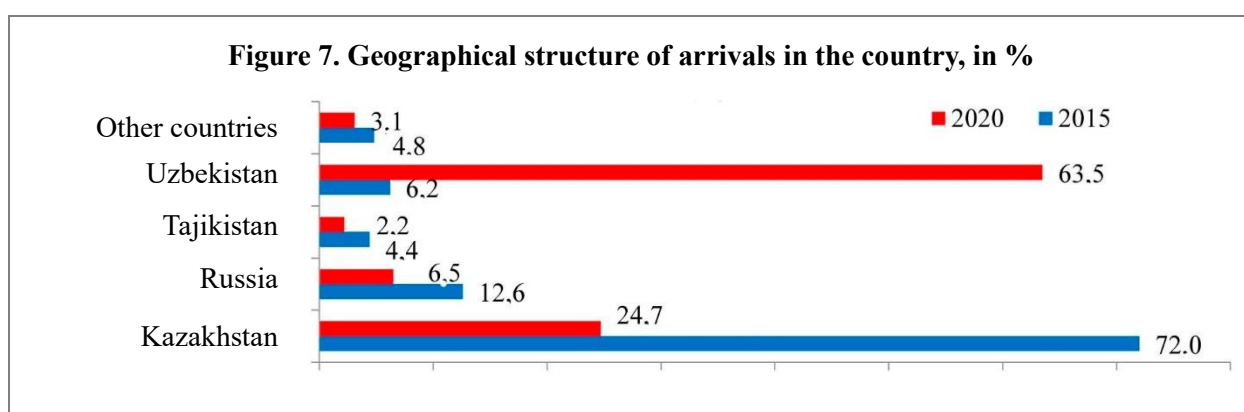
Thus, analyzing the data in Figures 2-5, we can conclude that for all indicators there was a growth trend until 2019, however, the COVID-2019 pandemic led to their sharp decrease. But despite this, after the stabilization of the situation, one can observe a slight, but still increase in indicators by the end of 2021.

According to the State Border Service of the Kyrgyz Republic, the number of crossings of the state border of the Kyrgyz Republic by foreign citizens had grown steadily - from 4.7 mln people in 2016 to 8.7 mln people in 2019. In 2020, this indicator decreased by 4 times compared to the previous year. At the same time, the number of persons who indicated the purpose of tourism when crossing the border decreased by almost 25 times (see Fig. 6).

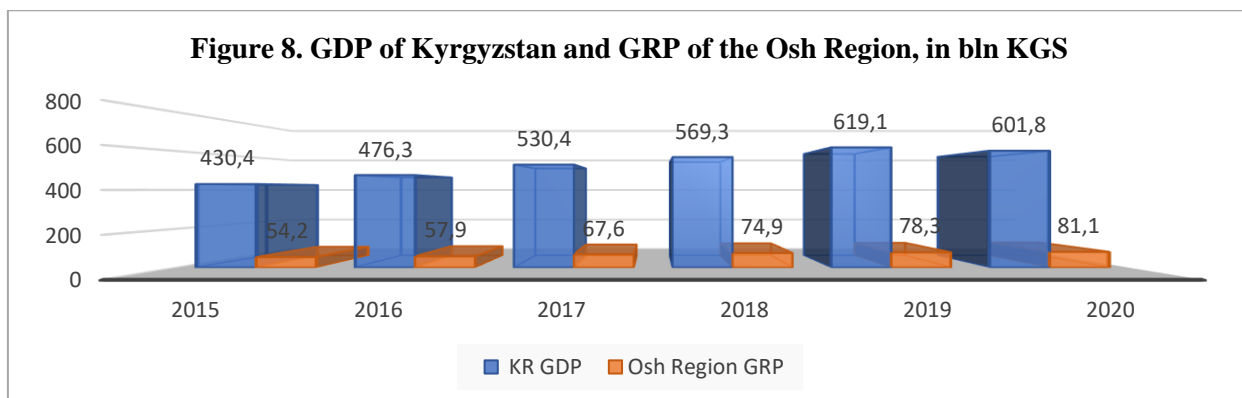


During the period under review, the geographical structure of visits to the republic has also changed. If in 2015 the border of the Kyrgyz Republic was crossed mainly by citizens of Kazakhstan (72.0%), then in 2020 citizens of Uzbekistan (63.5%) began to dominate in this indicator (see Fig. 7).

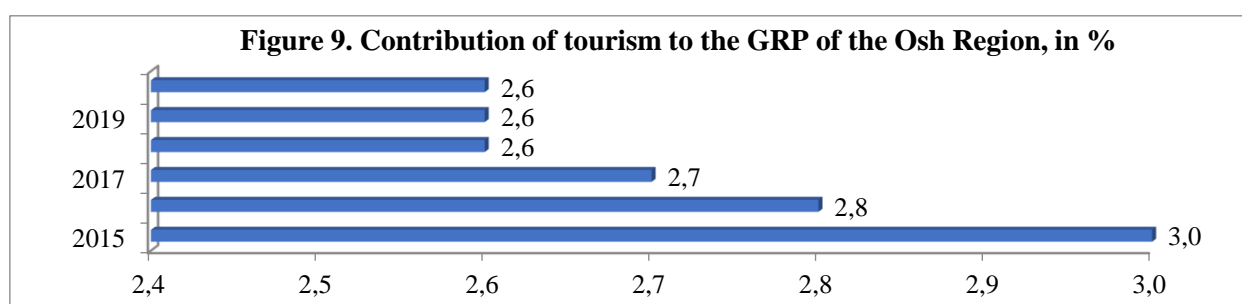
At the same time, it is important to take into account that, in accordance with the definition formalized in the Law of the Kyrgyz Republic “On Tourism”, not every foreign citizen crossing the border is a tourist. Tourists do not include those persons who are engaged in paid activities for a period of 24 hours to 6 months in a row or stay in the Kyrgyz Republic for an overnight stay for less than one day.



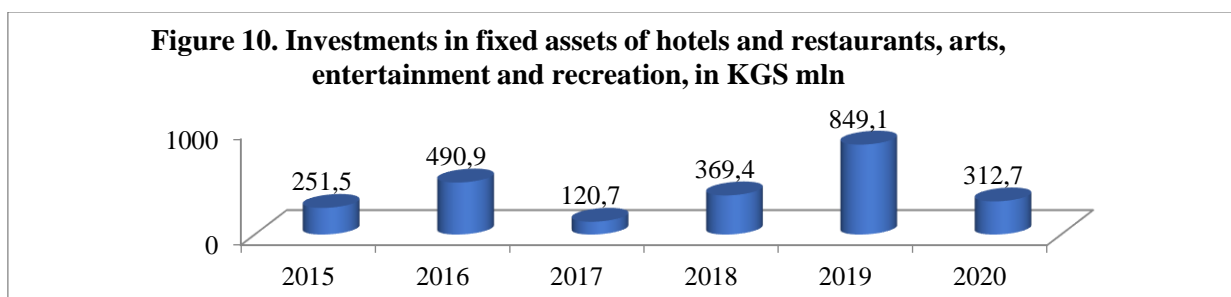
According to statistical calculations, the economy of the **Osh Region** was less affected by the COVID-2019 pandemic than the national economy as a whole. Thus, according to the NSC KR, while Kyrgyzstan's GDP fell by 2.8% in 2020 compared to 2019, the *gross regional product (GRP) of the Osh Region* increased by 3.6% (see Fig. 8).



At the same time, *the contribution of tourism to the GRP of the Osh Region* in the period from 2018 to 2020 remained at the same level and amounted to 2.6% (see Fig. 9).



However, the COVID -2019 pandemic has led to a decrease *in investment in fixed assets* in areas of activity directly related to tourism. Thus, in 2020, their volume decreased by 63.2% compared to 2019 (see Fig. 10).



The indicator “*number of visitors of tourism organizations, recreation facilities*” also decreased - from 64,862 people in 2019 to 33,763 people in 2020. However, it should be noted that this drop (by 48%) for the Osh region was less than for the whole country, where its value decreased by 68% (see Table 4).

Table 4. Number of visitors of tourism enterprises, recreation facilities, persons

	2015	2016	2017	2018	2019	2020
Republic of Kyrgyzstan	706 366	627 555	72 7759	74 9931	809 589	256 251
Osh region	47 662	49 021	48 946	52 610	64 862	33 763

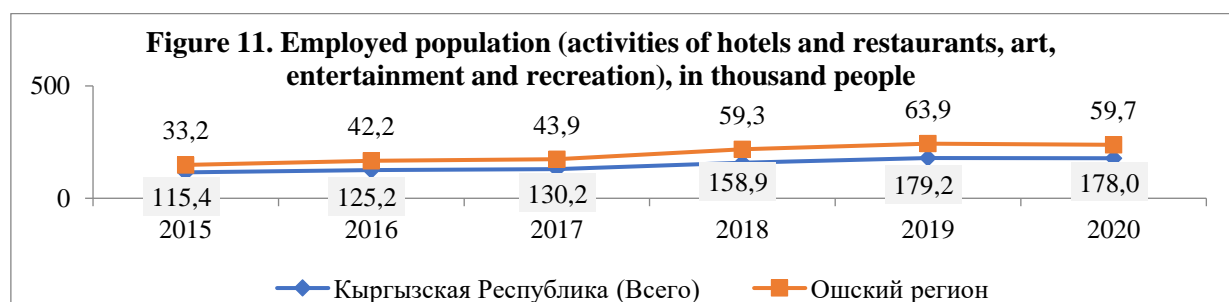
At the same time, *the infrastructural development* of the regional tourism sector is on the rise. The number of new hotels, restaurants, tourism enterprises, the number of specialized agencies and

tour operators is growing in the region. Thus, according to the data of the NSC KR for 2021, the total number of business entities registered in the region (legal entities and individuals) operating in the tourism sector has reached 1,863 units, including: 165 hotels, 62 tourism enterprises and recreation facilities, 928 restaurants, 692 travel agencies and tour operators, 13 health resorts and 3 natural parks and reserves (see Table 5).

Table 5. Registered economic entities (legal entities and individuals) operating in the tourism of the Osh Region, units

Name	2015	2016	2017	2018	2019	2020	2021
Hotels	129	133	137	145	150	158	165
Tourism and recreation enterprises	40	44	49	55	60	60	62
Restaurants	706	815	839	860	885	916	928
Travel agencies and tour operators	352	401	451	520	582	660	692
Sanatorium-resort institutions	12	12	12	eleven	12	12	13
Natural parks and reserves	3	3	3	3	3	3	3
Total:	1 242	1408	1 491	1 594	1 692	1 809	1 863

The dynamics of *the employment* in tourism-related industries generally correlates with changes in this indicator at the level of the republic (see Fig. 11).



At the same time, the region cannot yet boast of a large number of *international tourists*. In 2015-2021, Osh province accounted for only 1.5% of the total number of such tourists who visited Kyrgyzstan. The share of Osh city was slightly higher - on average, about 2.3% of the republican tourist flow passed through the city. The leading share for this indicator was taken by Issyk-Kul province with an average value of 67%.

The performance of the Osh Region in terms of *revenues of tour operators* looks rather pale as well. During the period under review, Osh province and Osh city had 0.1% and 1.8% of the national amount, respectively. While, on average, Bishkek accounted for 71%, and Issyk-Kul - 25% of all income received by tourist operators in the Kyrgyz Republic.

According to the Tourism Development Fund of the Kyrgyz Republic, tourists in Kyrgyzstan as a whole *spent about 70 US dollars per day in 2021*. At the same time, of all tourists in 2015, 2018 and 2021 who stayed in hotels, resorts and other organized organizations, almost 90% stayed in the country from 1 to 7 days.

According to the information of regional tour operators, up to 70-80% of tourists visiting Osh city *stayed here for up to 3 days on average*, and in Osh province even less - about 70% stayed only 1 night. Only about a third of tourists (mostly climbers) stayed in Osh province for 8-28 days.

1.4. Institutional support of the sector

As elsewhere in the world, tourism in the Osh Region is a cross-sectoral industry. Both state bodies exercising regulatory and supervisory functions, and direct actors of the industry - tour operators, as well as small and medium-sized businesses, take part in its formation and modernization. In recent years, an increasingly active role in the development of the regional tourism sector is played by the so-called. the third sector - numerous public associations, non-profit organizations of national and international persuasion, providing expert, coordinating and technical assistance to the promotion of the industry.

1.4.1. Strategic documents of the sector and monitoring of their implementation

Before proceeding to the assessment of the main industry players in the tourism sector of the Osh Region, it is advisable to dwell on its strategic documents and guidelines that determine the development of tourism in the Kyrgyz Republic, as well as analyze the current system for monitoring and evaluating indicators of its development.

The list of *strategic documents* that determine the long-term and medium-term development of the tourism sector at the national and regional levels is shown in Table 6. It follows that:

- not all administrative units of the region have strategic documents for tourism development;
- the planning horizons of strategic documents for tourism development at the regional and republican levels do not coincide.

Table 6. List of strategic documents in the field of tourism

No.	Administrative - territorial level	Strategic Documents
1.	Republic of Kyrgyzstan	NDS KR 2018-2040
		NDP KR 2021-2026
		TDP 2019-2023
2.	Osh city	TDP "Osh- Silk Road Provider"
3.	Osh province	No
4.	Alay district	TDS until 2027
5.	Aravan district	No
6.	Kara-Kulja district	No
7.	Kara-Suu district	No
8.	Nookat district	SDSP 2018-2023
9.	Uzgen district	No
10.	Chong-Alay district	SDSP 2022-2026

Table 7, in turn, demonstrates various types of *socio-economic forecasts* in the tourism sector. Its analysis shows that in most cases strategic documents use different forecast indicators, which are often not consistent with each other in terms of accuracy and balance of their values.

Table 7. Development forecasts in current strategic documents

Strategic Documents	Development forecasts
NDS KR 2018-2040 medium-term targets	It is expected that in five years the annual volume of international tourists will grow by 5%.
TDP “Osh- Silk Road Provider”	To increase the influx of tourists passing along the Great Silk Road from such countries: Germany, France, Benelux countries, Scandinavian countries, Great Britain, South Korea, USA, Canada, Israel and the CIS.
TDP “Osh- Silk Road Provider”	Increase the number of foreign tourists per year: 2022 - 30,000 people. ; 2023 – 80 000 people; 2024 - 200,000 people
TDP “Osh- Silk Road Provider”	Generate gross tourism revenue per year: 2022 – \$12 million ; 2023 - \$35 million; 2024 - over \$100 million.
TDP “Osh- Silk Road Provider”	To increase the influx of tourists passing along the Great Silk Road from such countries: Germany, France, Benelux countries, Scandinavian countries, Great Britain, South Korea, USA, Canada, Israel and the CIS.
TDP “Osh- Silk Road Provider”	Increase the number of foreign tourists per year: 2022 - 30,000 people. ; 2023 - 80,000 people; 2024 - 200,000 people
TDP “Osh- Silk Road Provider”	Generate gross tourism revenue per year: 2022 – \$12 million ; 2023 - \$35 million ; 2024 - over \$100 million.
TDS until 2027	Annual increase in the influx of tourists by 20%
SDSP 2022-2026	It is expected that in five years the annual volume of international tourists will grow by 5%.
SDSP 2022-2026	To ensure the annual growth of the regional gross product of the district by at least 1.5%.
SDSP 2022-2026	Creation of at least 50 new jobs per year.
SDSP 2022-2026	Ensuring growth of at least 5% per year in trade and services
SDSP 2018-2023	It is expected that in five years the annual volume of international tourists will grow by 5%.
SDSP 2018-2023	To ensure the annual growth of the regional gross product of the district by at least 3 %.
SDSP 2018-2023	Creation of at least 150 new jobs per year.
SDSP 2018-2023	Ensuring growth of at least 5% per year in trade and services.

An analysis of strategic documents in the field of tourism shows that many of them selected the cluster approach as a priority for development, which involves the creation/integration within a separate territory of a number of tourist destinations and destinations that are similar in content and functionality.

Table 8. Tourism development priorities mentioned in the strategic documents

Strategic Documents	Tourism development priorities
NDS KR 2018-2040 long-term targets	A tool for harmonizing demand and developing tourism is the formation of tourist clusters, including new winter recreation clusters. The need to give priority to the territorial aspect of the sectoral development of tourism is

	becoming increasingly clear. It is necessary to solve the problem of rational cooperation and self-organization of development subjects.
NDS KR 2018-2040 medium-term targets	Several geoparks will be created - special recreational and tourist zones created and operating under the auspices of UNESCO. This destination is one of the most popular among international tourists.
NDS KR 2018-2040 medium-term targets	Tourist clusters will be launched, with ski specialization on the basis of the city of Karakol and historical and cultural - on the basis of the city of Osh.
NDS KR 2018-2040 medium-term targets	<i>Project:</i> Launch of the medical tourism cluster.
NDP KR 2021-2026	The development of the tourism sector will be based on a cluster approach. The state will create conditions for launching several large tourist clusters, with ski specialization based on the city of Karakol, historical and cultural specialization - on the basis of the city of Osh, recreational specialization - on the basis of the city of Jalalabat. It is also necessary to launch a cluster of "medical tourism", focused on the provision of rehabilitation services, based on the natural and climatic features of the country and the creation of appropriate infrastructure.

An analysis of strategic and methodological documents on tourism development at the national level and in the Osh Region indicates that it is rather difficult to make systemic management decisions on the sustainable tourism development on the basis of currently collected statistical data.

The current system of collection and analysis of statistical data in the country is largely based on traditional statistics. To summarize, its main indicators are the ones of tourist flow volumes, the duration of stay, and some aspects of tourism enterprises' activities. In other words, the main emphasis is placed on the assessment of basic indicators collected through the border service, data from accounting and statistical reporting of enterprises, etc. At the same time, many other tourism industry indicators are overlooked, due to objective reasons as well. For example, a field study conducted by the project team in the main tourist destinations of the region has showed that such indicators as clean water access, the Internet, the availability of hygienic toilets, treatment facilities, the introduction of renewable energy sources, and the quality of infrastructure at tourist sites remain outside the scope of statistical observation.

An analysis of the strategic documents of the sector and the current system of statistics allows us to identify the following main **problems**:

- PR1.** In the Osh Region, there is no coordinated strategic planning process for tourism development, not all programs for socio-economic development of districts contain sections on tourism development, most local councils do not include in the plans for pasture management areas for the use of tourism and recreation of citizens.
- PR2.** The current system of tourism statistics is based on the assessment of basic indicators, which is not enough for high-quality monitoring of the sector development and making systemic management decisions.

1.4.2. State and municipal authorities

The Department of Tourism under the Ministry of Economy and Commerce of the Kyrgyz Republic is the authorized **national authority** in the implementation of the unified state in the field of tourism.

Despite the long history of the tourism sector in the system of public authorities of Kyrgyzstan, there is no independent tourism agency in the country. Since 2013 the Department of Tourism was a subordinate unit of the Ministry of Culture, Information and Tourism of the Kyrgyz Republic. As part of the reform of executive authorities in 2021 it was transferred to the Ministry of Economy and Finance of the KR. However, in the same year it returned to the structure of the Ministry of Culture and Information, Sports and Youth Policy of the Kyrgyz Republic. In May 2023, the Department was again transferred to the Ministry of Economy and Commerce of the KR.

In accordance with the Regulations on the Department, approved by the Resolution of the Cabinet of Ministers of the Kyrgyz Republic dated November 15, 2021 No. 251, its key functions include:

- development of mechanisms for state support of tourism;
- formation of a positive image of the country in the world tourism market;
- creation of favorable conditions for the development of the tourism industry, the provision of methodological and consulting assistance to the subjects of the tourism sector;
- monitoring the activities of organizations in the field of tourism;
- maintenance of the Unified Register of objects and subjects of tourism activities.

In accordance with the "Program of the Government of the Kyrgyz Republic for the development of the tourism sector for 2019-2023", approved by the Decree of the Government of the Kyrgyz Republic of January 31, 2019 No. 36, the following main tasks were set before the state authorities:

- in order to effectively implement the state policy in the field of tourism and the rational use of state facilities of sanatorium-resort organizations, create an economic body;
- to introduce a system of cluster approaches in tourism ;
- taking into account the increase in the number of tourists, ensure the growth of tax revenues to the budget;
- to develop a list and methodology for collecting and calculating additional indicators in the field of tourism in accordance with the methods used by international organizations - UNWTO and WTTC;
- to introduce international standards for the classification system of accommodation facilities (hotels, motels, guest houses) to give them a status in accordance with modern requirements;
- to develop effective regional and district action plans for the development of roadside infrastructure: service facilities (public catering, maintenance, medical points), signs in Kyrgyz, Russian and English;
- to ensure the rehabilitation of sewage facilities for tourist sites and routes;
- to take measures to preserve and popularize objects of historical and cultural heritage located in the regions;
- on a systematic basis, to conduct research on the formation of demand in the domestic market of tourist services, the definition of new potential world markets and customers for the domestic tourist product;
- provide marketing promotion of domestic tourism products in the markets of near and far abroad.

In the **Osh Region**, the Plenipotentiary Representation of the President of the Kyrgyz Republic in Osh province, as well as municipal authorities, are responsible for ensuring the implementation of the state (and local) policy in the field of tourism. In accordance with the Law of the Kyrgyz Republic "On Local State Administration and Local Self-Government Bodies" dated October 20, 2021 No. 123, the executive power in the district is exercised by the local state administration. The executive body of local self-government in the city is the mayor's office, and in the aiyl aimak it is the aiyl okmotu.

In practice, only one employee deals with the issues of tourism development in administrative-territorial units, to whom this direction is given "in addition" to the main activity. For example, in

the Mayor's Office of Osh, the Department of External Relations and Analytics is responsible for the implementation of tourism policy. Its staff strength is 12 people, while only the head of the department is responsible for tourism development with such functions as:

- preparation of proposals for the development and improvement of the tourism industry;
- joint work with tourism associations, international organizations and foundations to strengthen relations with foreign countries;
- assistance and control over the implementation of state and local policies in the field of tourism development;
- organization of financing from international organizations and financial institutions for the development of the tourism sector.

In general, the functions of local governments in terms of tourism development can be reduced to solving the following issues:

- ensuring the economic development of the relevant territory, as well as attracting investments and grants;
- supply of drinking water to the population;
- ensuring the operation of the sewerage system and treatment facilities in settlements;
- ensuring the functioning of municipal roads in settlements;
- improvement and gardening of public places;
- ensuring the functioning of parks, sports facilities and recreation areas, creating conditions for organizing leisure activities;
- organization of collection, removal and disposal of household waste.

In addition, the competence of city mayor's offices and aiyl aimaks as local governments also includes the implementation of measures to protect historical, architectural, and cultural monuments.

An analysis of the functionality and activities of state and local authorities revealed the following main **problems**:

- PR3.** Constant changes in the structure of the Department of Tourism lead to unsustainable institutional support for the tourism sector by the state.
- PR4.** There is only one officer responsible for tourism issues at all levels of the executive branch in the Osh Region, who is also responsible for other issues of socio-economic development.
- PR5.** The system of public authorities has not yet developed a comprehensive vision for the development of the tourism sector, taking into account the need for an intersectoral general economic nature of promoting the industry.

In addition, an assessment of the institutional support for tourist destinations, based on the results of the *field study*, showed the following. When correlating the following components from the "Management" factor:

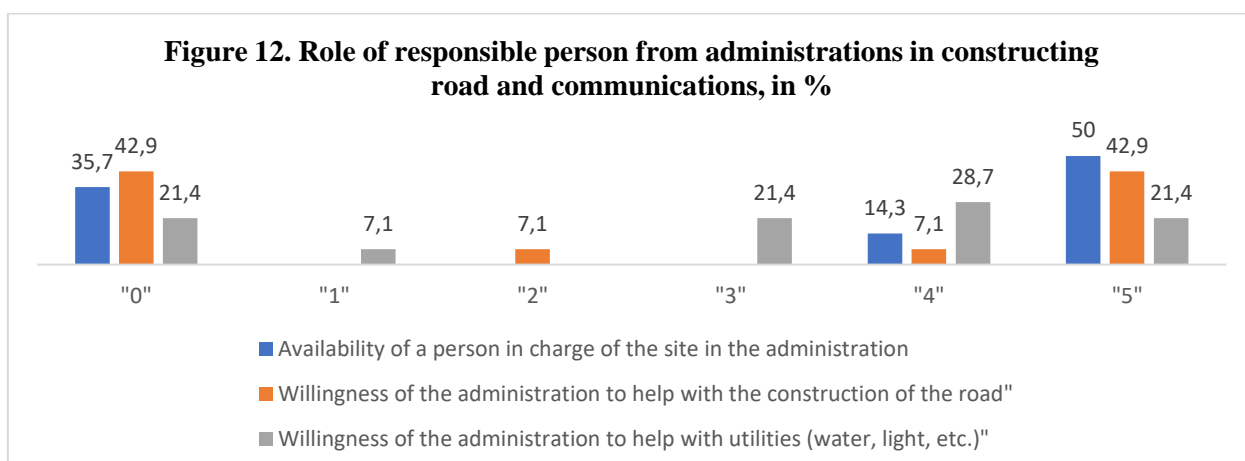
“The presence of a person responsible for the object in the administration” →

“The readiness of the administration to help with the construction of the road”,

“The readiness of the administration to help with the supply of communications (water, electricity, etc.)”,

it became clear (Fig. 12) that only in the case of 42.9% and 21.4% of tourist sites, local administrations are ready to help, respectively, with the construction of the road and the supply of

communications at the “excellent” level. In many ways, this readiness is influenced by the fact that 50% of locations have specific curators in local governments.



This thesis is supported by the fact that:

- 35.7% of locations do not have specific responsible persons in local administrations at all;
- 64.3% of the objects did not receive support from local administrations with the construction of a road or communications.

This analysis revealed the following additional **problem**:

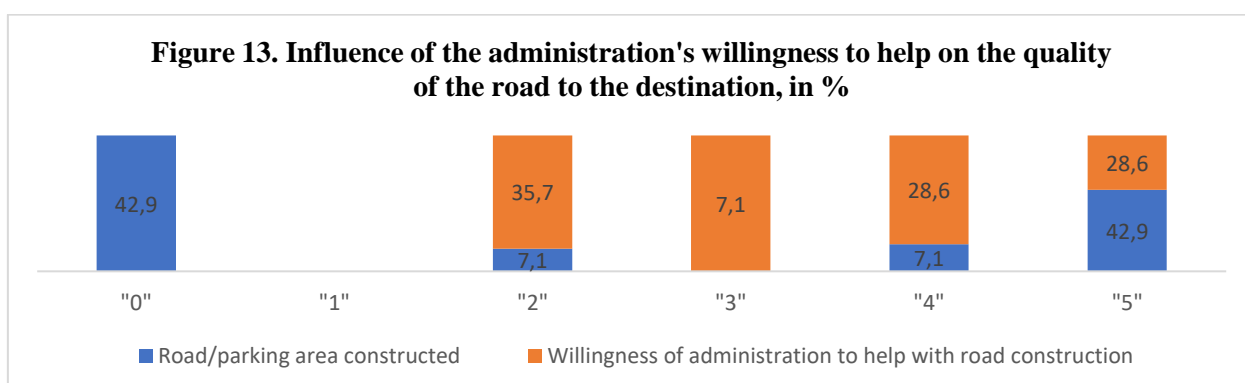
PR6. Not all organizational units authorized for tourism development in local administrations properly perform the role of curator to support and develop the activities of tourism sector entities. In other words, some destinations do not have administrative support from their side.

If we go further, and compare the different components of the factors "Management" and "Economy":

“The readiness of the administration to help with the construction of the road” (factor “Management”) →

“Road/parking lot laid” (factor “Economy”),

it becomes clear (Fig. 13) that the assistance to locations with the construction of the road provided by local administrations varied everywhere.



- none of the locations received administrative assistance, in which the condition of the roads would be assessed as "poor condition";
- 7.1% of locations were supported with a "below average" rating;

- 7.1% of locations - "above average condition";
- 42.9% of locations are "excellent condition".

As a result, the road infrastructure to the destinations currently looks like this:

- There is a road to all locations. This is evidenced by the fact that none of the objects in question received the rating "not available";
- At the same time, the quality of roads is different for all locations:
 - There are no locations that have a road with a rating of "poor condition";
 - 35.7% have roads that are rated as "below average";
 - 7.1% - "above average condition";
 - 28.6% - "average condition";
 - 28.6% - "excellent condition".
- 42.9% of tourist sites did not receive any administrative assistance in road construction;
- 7.1% of destinations received "below average" road construction support from administrations;
- 35.7% - have roads whose condition is "below average".

In turn, when correlating the following components of the factors "Management" and "Economy":

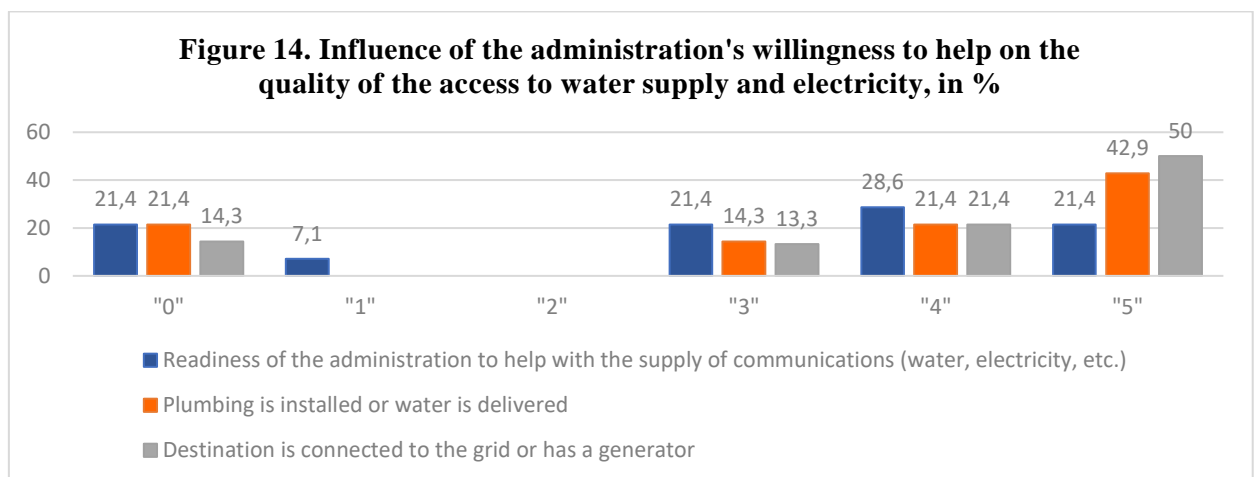
"The readiness of the administration to help with the supply of communications" ("Management") →

"Access to the electricity grid or power generator" ("Economy") and

"Access to piped water or drinking water delivery" ("Economy"),

it turns out (Fig. 14) that the assistance provided by the administrations with the supply of communications was also not the same:

- none of the destinations received administrative assistance assessed as "below average";
- 7.1% of destinations received it at the "poor condition" rating level;
- 21.4% - "average condition";
- 28.6% - state "above average";
- 21.4% - "excellent condition".



As a result, the quality of communal communications at locations is also in different states:

- none of the locations has access to potable water and electricity with ratings of "poor condition" and "below average condition";
- 14.3% and 21.4% of locations have access to drinking water and electricity, respectively, at the level of "average condition" and "above average condition";

- 42.9% of destinations have access to drinking water and 50% to electricity, rated as "excellent condition".
- 21.4% of locations did not receive assistance in laying communications;
- 21.4% of destinations do not have access to potable water and 14.3% of destinations do not have access to electricity.

Cross-analysis of individual components of the factors "Management" and "Economy" made it possible to identify the following **problems**:

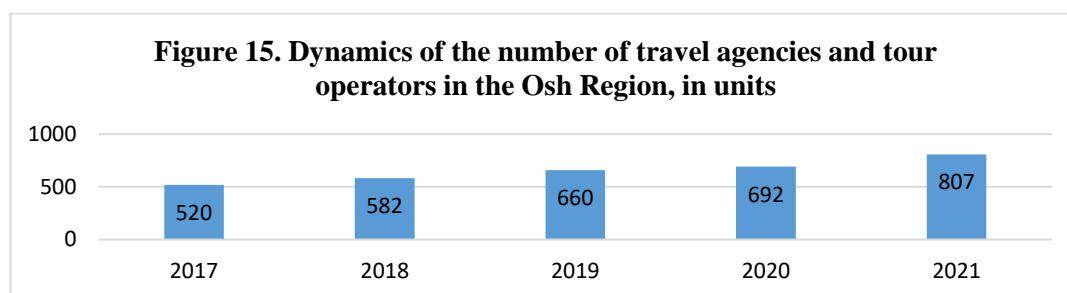
PR7. The readiness of administrations to help with laying communications and building roads does not always coincide with the actual plans for their implementation. This indicates a low level of involvement of all stakeholders in decision-making on the infrastructure development of destinations.

PR8. The process of tourism promotion has generally weak institutional support and does not correspond to the status of this industry as a priority sector of the economy.

1.4.3. Private sector

Private sector organizations that form the regional tourism sector include tour operators and agencies, hotels and guest houses, sanatoriums and resorts, as well as cafes and restaurants.

According to the NSC KR, the number of **travel agencies and operators** registered in the Osh Region as of the beginning of 2022 amounted to 807 entities (see Fig. 15).



At the same time, not all of them are active. Among the most notable organizations in the market, it should be noted:

№	Name	Website/Social network
1.	Ethno Trip	Ethno_travell
2.	KyrgyzPamirTours	www.kyrgyzpamirtours.com
3.	Destination Osh	www.destinationosh.com
4.	Visit Alay	https://visitalay.com
5.	Osh Trips	
6.	Osh Travel	www.oshtravel.com
7.	Munduz Tourist	@munduz_tourist_osh
8.	Sunrise Travel	http://www.sunrise-osh.kg/
9.	Eco Travel	
10.	Kettik Osh	
11.	Open world KG	

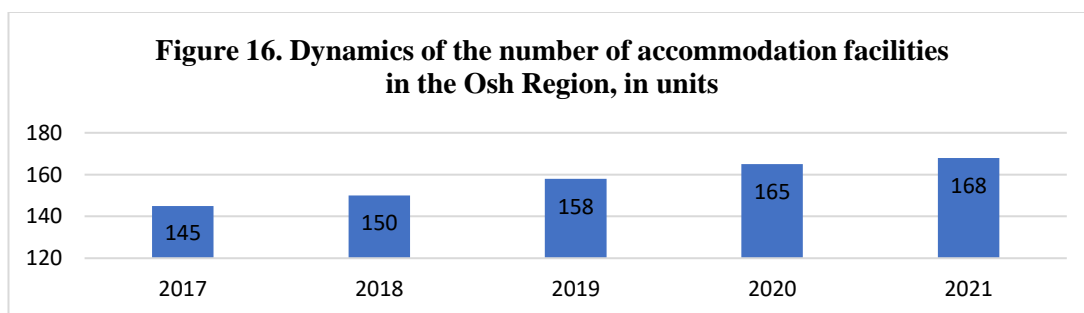
The most active regional tourist organizations are **Destination Osh** and the tourist bureau **Osh Travel**. If the first organization is a broad tourism platform, which also performs public functions (information about it can be found in the section "Public associations"), the second is one of the oldest tourist commercial organizations in the region, founded back in 2006.

Osh Travel specializes in creation of tour packages for tourists who travel along the lines of cultural and educational, ethnographic, cultural and natural history, research, esoteric, gastronomic and mountain tourism. Since 2008, the only excursion and methodological department in the south of the Kyrgyz Republic has been operating at the travel agency. A methodologist is constantly working in the department, and guides and participants in trainings organized on the basis of the department have access to a large fund of local history literature. The head of the bureau is L.Khasanova, one of the prominent specialists in the cultural and natural heritage of the countries of Central Asia, the leading guide of cultural tourism in Kyrgyzstan.

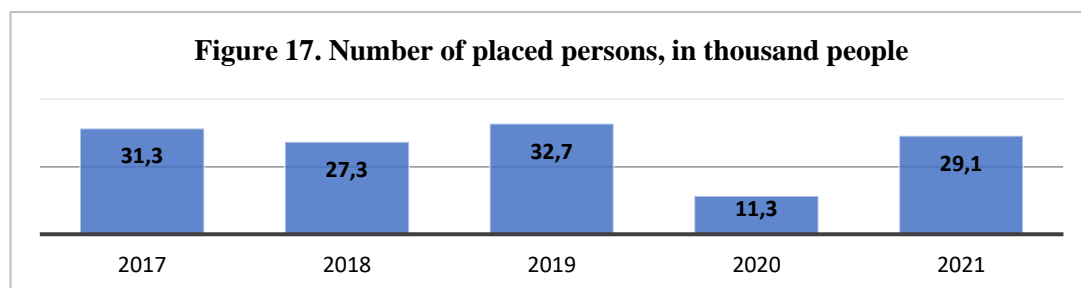
According to *expert assessments*, the following main **problems** are currently encountered in the activities of travel agencies and operators:

- PR9.** The activities of tour operators are not recognized as exporters of services and are highly taxed. In this regard, the activities of a significant share of regional operators continues to belong to the shadow economy.
- PR10.** There is a notification procedure for passing the Kyrgyz-Tajik border for citizens of third countries.

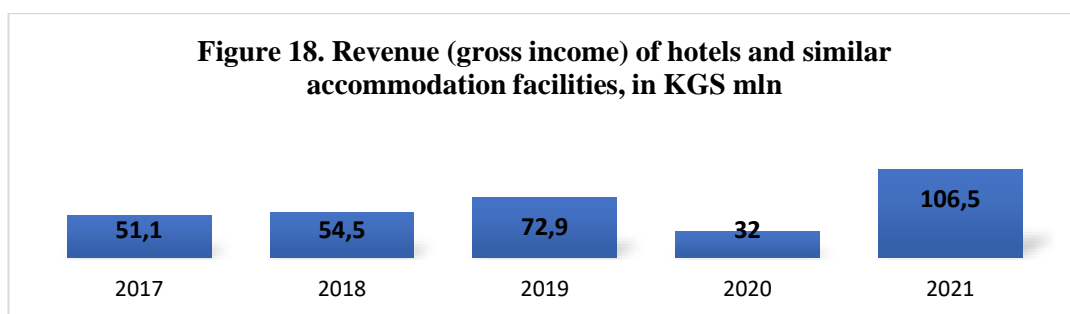
According to the NSC KR, the number of **hotels and other accommodation facilities** in the Osh Region for 2021 amounted to 168 units.



Despite an increase in the total number of accommodations, the number of people accommodated in them does not show a positive growth trend. Moreover, the COVID-19 pandemic led to a sharp decline in the number of accommodations in 2020.



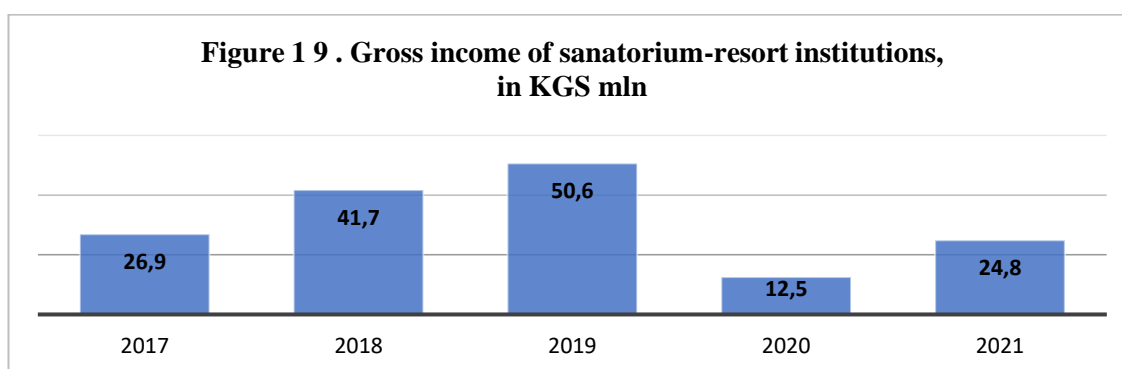
At the same time, a year later, the gross income of accommodation facilities increased sharply and amounted to 106.5 KGS mln.



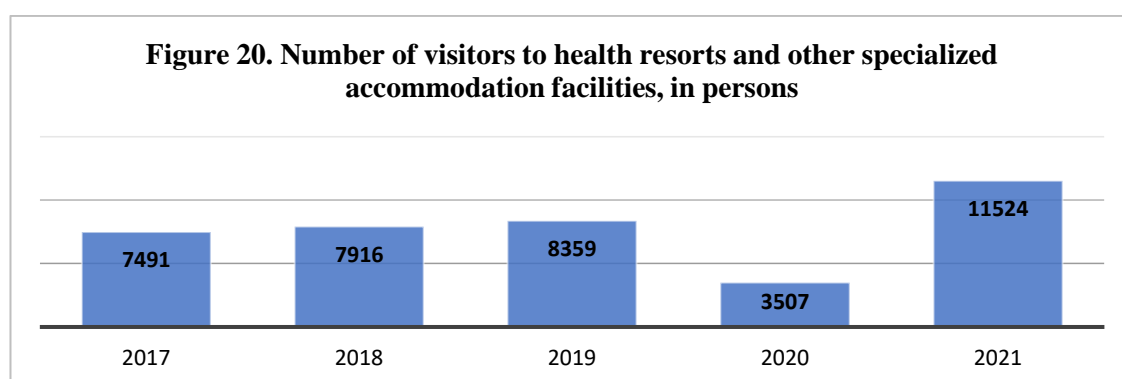
According to *expert assessments*, there are the following main problems in the activities of hotels and other means of accommodation in the Osh Region:

- PR11.** Most of the accommodation facilities in the region have a mediocre quality of service, due to the low level of staff training and high staff turnover.
- PR12.** Many owners of accommodation facilities lack an understanding of the importance of destination marketing, including through modern digital tools (websites, social networks, booking systems).

In general, there are 13 **sanatorium-resort institutions** in the Osh Region. The income of these organizations grew dynamically in the period before the start of the COVID -19 pandemic.



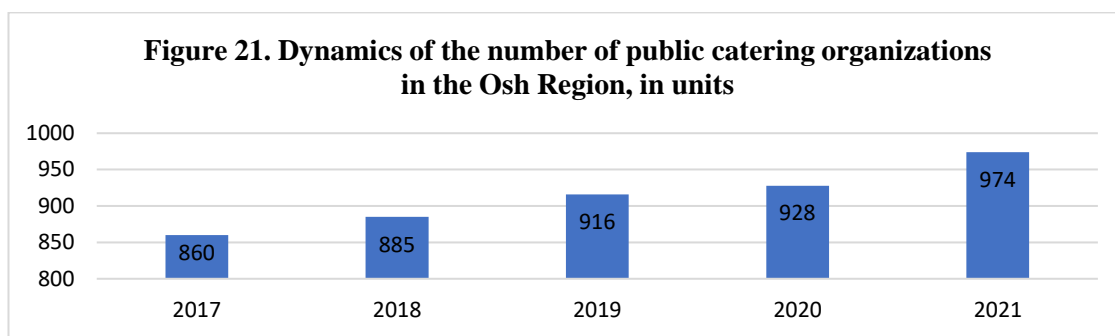
Despite a decline in the number of visits in the pandemic year of 2020, the following year was marked by a sharp increase in the popularity of regional health resorts.



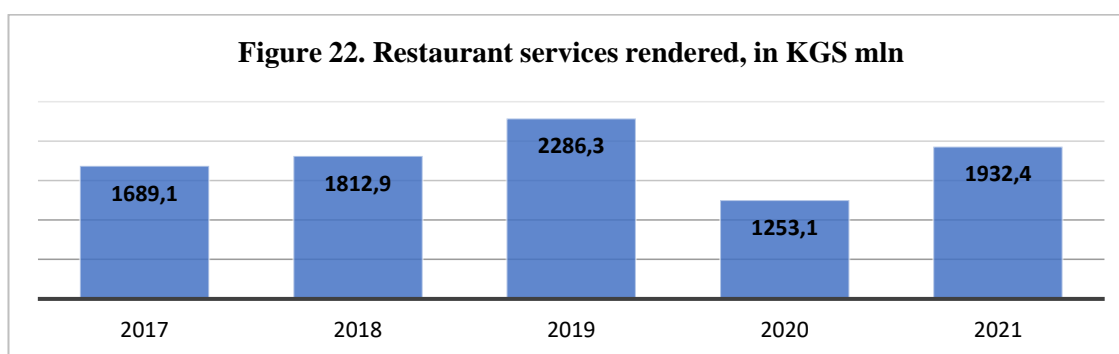
According to *expert assessments*, there are the following main **problems** in the activities of sanatoriums and health resorts in the region:

- PR13.** In most sanatorium-and-spa institutions of the region, there is a low quality of services provided, due to their weak or outdated material and technical equipment.
- PR14.** The work of many sanatorium-and-spa institutions is seasonal, which is explained by the lack of profiling of these institutions and the weak introduction of the latest biomedical developments.
- PR15.** A serious obstacle hindering the sustainable development of many tourism enterprises, especially in remote mountainous areas of the region, is the seasonal nature of the business (many enterprises are forced to stand idle in the winter and off-season).

Public catering organizations in the Osh Region have been showing progressive growth for a number of years. Even the COVID -19 pandemic did not affect the dynamics of their numbers.



The revenues of these organizations had a steady upward trend, but in 2020 they fell sharply due to the pandemic, and began to recover a year later.



According to *expert assessments*, the following main **problems** are most typical for the activities of catering organizations in the Osh Region:

- PR16.** There is a low rate of digitalization. The majority of catering outlets in Osh Region, especially in small towns and rural areas, do not have food delivery services.
- PR17.** There is a shortage of trained professionals, especially it is difficult to find cooks. At the same time, many businesses do not pay proper attention to training and retraining of staff.

1.4.4. Public associations

In line with the Law of the Kyrgyz Republic "On Tourism" dated March 25, 1999, **tourism associations** have the right to:

- promote the development of the market of tourist services and civilized market relations, the formation of a modern, competitive tourism industry, counteract monopoly and corruption in tourism activities;
- protect the legitimate interests of non-profit organizations in the field of tourism;
- make proposals for changing the normative legal acts regulating the tourism sector in the manner prescribed by law.

In total, there are about 10 large national associations operating in the field of tourism in Kyrgyzstan. The largest ones include:

- Kyrgyz Association of Tour Operators (KATO)
- Kyrgyz Association of Community-Based Tourism (KCBTA)
- Association of hotel and restaurant business
- Silk Road Tourism Association
- Association of health resorts
- Association of Resorts of the Kyrgyz Republic
- Union of hiking tourism
- HORECA Club Association (restaurateurs and hoteliers)
- Tourism Association of the Kyrgyz Republic (outbound tourism)
- Association of ski bases of the Kyrgyz Republic

Each of them is engaged in the development of certain areas of tourism activities, including:

- ❖ **KATO** is a non-profit organization that defends the corporate interests of its members and the rights of the clients they serve. KATO is also engaged in the implementation of specific projects - marketing, educational, informational. On an annual basis, the Association conducts trainings to prepare guides for the new tourist season.
- ❖ **KCBTA** is an organization that promotes the principles of community-based tourism. The main goal of the association's work is to improve living conditions in remote mountainous regions through the development of sustainable ecotourism models using local natural and recreational resources. Headquartered in Bishkek, KCBTA acts as an association of 15 communities in various regions of Kyrgyzstan.
- ❖ **Silk Road Tourism Association** was established in 1999 as a result of the unification of the 5 largest tour operators of the Kyrgyz Republic. The Association conducts training and certification of guides, instructors and rescuers. Since 2005, it publishes an annual magazine "Tourism of Kyrgyzstan", which focuses on the problems of the tourism industry of the Kyrgyz Republic and ways of solving them.

At the level of **the Osh Region**, the largest tourist association is **the Silk Road Tour Operators Association**, established on the initiative of the Osh Mayor's Office in April 2022. As its strategic goal, the association aims to involve as many tour operators as possible to attract international tourists to the Fergana Valley region in the future.

The undoubted leader of the tourist community in the southern region of Kyrgyzstan is **Destination Osh** headed by A. Aliev. This public organization was established in 2015 and unites a number of tour operators, hotels, restaurants and transport companies of the Osh region in a single network. It specializes in conducting linguistic and technical trainings for employees of the tourism sector.

Destination Osh promotes tourism throughout the southern region of Kyrgyzstan, providing technical and advisory assistance to the newly created Destination Jalalabat and Destination Batken. With the help of the organization, a project was launched to create a geopark "Madygen"

in Batken province, and there are plans to launch another geopark in Osh province (see paragraph 2.4.8.). In 2021, Destination Osh opened a Tourist Information Center (see paragraph 2.4.9.), which provides a wide range of consulting and organizational services, including for international tourists.

In addition, Destination Osh performs a large amount of work and is a kind of a regional tourist hub for mobilizing resources to solve various problems of the tourism sector, organizing city and regional tourist festivals and events, programming strategic documents of regional tourism sector development, as well as carrying out information and marketing promotion of tourist potential and products of the Osh Region at both the national and international levels.

According to *expert assessments*, the following **problem** is noted in the activities of tourist associations:

- PR18.** There is a low corporate culture of tour operators, due to the lack of understanding of the importance of strategic planning and institutional promotion of public interests.

There are two **Tourism Development Councils** in the Osh Region:

- Osh Tourism Development Council under the Osh Mayor's Office, formed by the Resolution of the Mayor's Office dated February 25, 2019 No. 34;
- Tourism Development Council of Osh province under the Plenipotentiary Representative of the President of the Kyrgyz Republic in Osh province, formed by the Order of the PRP KR in Osh province dated April 24, 2019 No. 222-b.

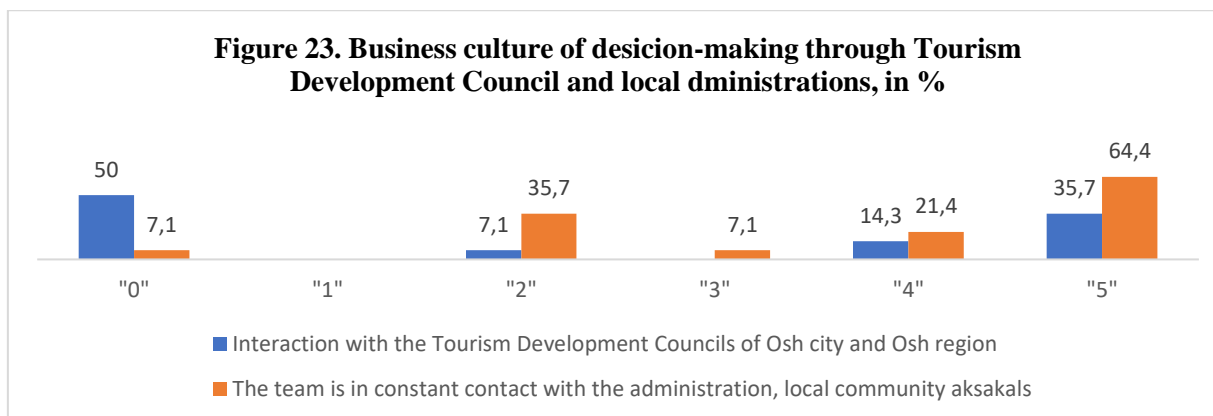
These Tourism Development Councils are designed to act as a unified advisory platform, bringing together representatives of the tourism community and government agencies to exchange views and promptly address issues facing the industry. Their composition includes responsible government officials, representatives of the university and creative community, tour operators. The main task of the councils is participation and assistance in forming of an attractive tourism and investment image of the region through the provision of effective state policy for attraction of investments and creation of conditions for subjects of tourist industry in the region. Moreover, it was expected that the Councils will promote marketing solutions in tourism. However, according to expert opinion, in practice, the work of the Councils is usually reduced to purely bureaucratic tasks descended through various ministries and departments.

Based on the results of the *field study*, a comparative analysis of the components of the "Management" factor made it possible to identify the following correlation:

"Interaction with the Councils for the Development of Tourism under the Osh Mayor's Office and under the PRP KK in Osh province" ↔

"The team is in constant contact with the administration, aksakals of local communities".

The analysis of Figure 23 shows that about 64% of the locations examined have excellent contacts with the administrations and aksakals of local communities, while only about 36% of destinations have contacts at the same level with the Tourism Development Councils. At the same time, 50% of the locations have no interaction with these public platforms.



This suggests that the Tourism Development Councils of the Osh Region do not yet enjoy sufficient trust from tourist destinations. Therefore, most of them still solve issues in the old way: directly with local administrations and aksakals of local communities.

The work of the Councils for Tourism Development under the Osh Mayor's Office and under the Plenipotentiary Representation of the President of the Kyrgyz Republic in Osh province is poorly coordinated due to bureaucratic reasons, although they include the same representatives of the tourism industry. This leads to the following **problem**:

- PR19.** There are no transparent and de-bureaucratized regulations for the interaction of the Tourism Development Councils operating in the region with each other and with the subjects of the tourism sector.

1.5. Tourism regulatory environment

The legislation of the Kyrgyz Republic in the field of tourism can be conditionally divided into five thematic groups of legal acts that directly or indirectly regulate the tourism sector.

The *first group* includes legal acts relating to the organization of tourism activities and the activities of state authorities in the field of tourism:

- The **law** regulating the tourism sector is the Law of the Kyrgyz Republic "On Tourism" dated March 25, 1999 No. 34

Since its adoption, three editorial changes have been made:

- Law of the Kyrgyz Republic dated October 21, 2003 No. 218
- Law of the Kyrgyz Republic dated December 5, 2013 No. 211
- Law of the Kyrgyz Republic dated May 10, 2017 No. 79

The current Law "On Tourism" does not meet modern requirements of tourism regulation, which makes it difficult to integrate the industry with the rapidly growing world market. At the same time, the tourism industry of the republic is developing dynamically and is recognized as one of the priority sectors of the state economy.

- **Regulation** (as of May 2023) "On the Department of Tourism under the Ministry of Culture, Information, Sports and Youth Policy of the Kyrgyz Republic", approved by the Resolution of the Cabinet of Ministers of the Kyrgyz Republic dated November 15, 2021 No. 251

The Department is a subordinate unit of the MEC KR (as of June 2023), which provides functions for the implementation of state policy in the field of tourism.

- **Decree** of the Cabinet of Ministers of the Kyrgyz Republic "On the Establishment of an Open Joint-Stock Company "Tourism Development Support Fund in the Kyrgyz Republic" dated March 11, 2022 No. 128

The activities of the JSC "Tourism Development Support Fund in the Kyrgyz Republic" are carried out on the basis of the charter of an open joint stock company. For a comprehensive solution of problems in the field of national tourism, the Fund was allocated 1 KGS bln.

The *second group* of NLAs regulate the procedure for attracting and using resources in the field of tourism:

- **Land Code** of the Kyrgyz Republic dated June 2, 1999 No. 45

In general, there are no obstacles to the conduct of tourism activities in the norms of the Land Code of the Kyrgyz Republic. Lands can be leased on a general basis for 49 years, which creates favorable conditions for long-term investments. But there are certain problems with the timing of the use of pastures for other purposes (for tourism and recreation). This norm of the Land Code is connected with the Law "On Pastures".

- **Forest Code** of the Kyrgyz Republic dated July 8, 1999 No. 66

According to Article 48 of the Forest Code of the Kyrgyz Republic, it is possible to develop tourism on the lands of the state forest fund, which can be leased for 49 years. This provision is the key to the long-term tourism development in forest lands.

- **Law** of the Kyrgyz Republic "On Pastures" dated January 26, 2009 No. 30

The Law "On Pastures" allows transferring land plots of pastures for other purposes (tourism and recreation). But there are time limits - land is provided for a maximum of 5 years. This time is not enough for the development of a tourism business, in fact, 5 years are spent only on the "buildup" of the object and the development of the clientele. At the same time, starting rental rates for these lands are quite high and often unaffordable for those wishing to develop the tourism business.

- **Law** of the Kyrgyz Republic "On Public-Private Partnership" (PPP) dated August 11, 2021 No. 98

This law fully allows to carry out investments on tourism infrastructure projects. The new version of the Law simplified the procedure for initiating PPP projects. Due to initiation problems in the old version of the law, only 3 PPP projects were implemented.

- **Law** of the Kyrgyz Republic "On Local State Administration and Local Self-Government Bodies" dated October 20, 2021 No. 123

The competence of LSG bodies includes the following issues, which are important for the sphere of tourism, but for the most part are not addressed due to lack of funds in local budgets:

- ensuring the economic development of territories, attracting investments and grants;
- ensuring the functioning of municipal roads in settlements;
- improvement and gardening of public places;
- ensuring the functioning of parks, sports facilities and recreation areas, creating conditions for organizing leisure activities;
- organization of collection, removal and disposal of household waste;
- supply of drinking water to the population;
- ensuring the operation of sewerage systems and treatment of facilities in settlements;
- arrangement of lighting for common areas.

- **Law** of the Kyrgyz Republic “On Renewable Energy Sources” dated June 30, 2022 No. 49

The law regulates all issues related to renewables, including the use of them at tourist sites. Since the Law was adopted recently, mechanisms for implementing its norms in the form of by-laws have not yet been developed.

- **Tax Code** of the Kyrgyz Republic dated January 18, 2022 No. 3

The norms of the Tax Code of the Kyrgyz Republic establish the types of tax regimes for doing business. For the tourism sector, they are generally not very burdensome, with the exception of the catering industry, where a tax rate of 8% on turnover is set in the “single tax” tax regime most often used by entrepreneurs, which is considered quite burdensome.

- **Law** of the Kyrgyz Republic "On the Park of Creative Industries" dated August 8, 2022

The main goal of the Law "On the Park of Creative Industries" is to create a legal basis for the functioning of a special regime for entrepreneurs engaged in creative activities. But the park itself is not a physical object, rather a special tax regime. Creative activities include architecture, landscape and graphic design, fine arts, media arts, music, film, craft, fashion industry, etc. It is expected that the adoption of the law will stimulate the emergence of these industries from the shadows. Since this Law was adopted recently, mechanisms for implementing its norms in the form of by-laws have not yet been developed.

The *third group* of NLAs regulates safety and environmental issues, including in the field of tourism:

- **Law** of the Kyrgyz Republic "On Environmental Protection" dated June 16, 1999 No. 53

The law gives the following definition of recreational areas: "this is a part of the environment used for recreation and tourism, including green, resort, medical and recreational areas."

There are certain restrictions on the conduct of tourism activities in certain natural areas. This is done to protect the environment from negative impacts. In general, the law allows tourism activities in recreational areas.

It also regulates issues of environmental safety, protection and control of the environment in the conduct of economic activities, including in the field of tourism.

- **Law** of the Kyrgyz Republic "On the protection and use of flora" dated June 20, 2001 No. 53

The law allows the use of flora for recreational and tourist purposes subject to certain norms and restrictions.

- **Law** of the Kyrgyz Republic "On Specially Protected Natural Territories" dated May 3, 2011 No. 18

The use of specially protected natural areas for tourism purposes implies:

- Specially protected natural areas can be used to develop ecological tourism, attract the local population to the development of tourism infrastructure and ensure their sustainable functioning, as well as to get acquainted with the natural, historical and cultural attractions of the area.
- In specially protected natural areas, it is allowed to organize and arrange ecological routes, tourist trails and parking lots, place tourism facilities, museums and outdoor expositions in specially designated areas, depending on the regime of the established zone, in the manner determined by the Government of the Kyrgyz Republic.

- **Law** of the Kyrgyz Republic "On Biosphere Territories" dated June 9, 1999 No. 48

The law allows recreational use, outdoor recreation, tourism, carefully controlled and regulated in environmentally acceptable standards

- **Law** of the Kyrgyz Republic "On the Basics of Technical Regulation in the Kyrgyz Republic" dated May 22, 2004 No. 67

The NLA establishes the legal framework in the field of development, adoption, application and implementation of mandatory requirements for products, including for buildings and structures, and/or for design processes related to product requirements (including surveys), production, construction, installation, adjustment, storage, transportation, sale, operation and disposal.

- **Regulation** "On the Ministry of Natural Resources, Ecology and Technical Supervision of the Kyrgyz Republic", approved by the Resolution of the Cabinet of Ministers of the Kyrgyz Republic dated November 15, 2021 No. 263

The Ministry performs the following functions in the field of tourism:

- submits to the Cabinet of Ministers of the Kyrgyz Republic a proposal on the creation, transformation and termination of the functioning of specially protected natural areas;
- determines the list of territories promising for the development of tourism, the procedure for the development, arrangement and use of ecological routes and trails.
- **Decree** of the Kyrgyz Government "On the Unified System for Comprehensive Monitoring and Forecasting of Emergencies in the Kyrgyz Republic" dated October 23, 2019 No. 569
- **Decree** of the Cabinet of Ministers of the Kyrgyz Republic "On Certain Issues of the Ministry of Emergency Situations of the Kyrgyz Republic" dated November 15, 2021 No. 262

The *fourth group* of NLAs regulates procedural issues of entry and exit of tourists:

- **Law** of the Kyrgyz Republic "On External Migration" dated July 17, 2000 No. 61
- **Law** of the Kyrgyz Republic "On the State Border of the Kyrgyz Republic" dated May 16, 2015 No. 98
- **Law** of the Kyrgyz Republic "On Customs Regulation" dated April 24, 2019 No. 52
- **Law** of the Kyrgyz Republic "On the Introduction of a Visa-Free Regime for Citizens of Certain States for up to 60 days" dated July 21, 2012 No. 121
- **Decree** of the Kyrgyz Government "On approval of the List of Foreign States Whose Citizens are Subject to a Simplified Visa Regime" dated February 7, 2009 No. 87
- **Decree** of the Kyrgyz Government "On approval of the Rules for Establishing a Regime at Checkpoints Across the State Border of the Kyrgyz Republic and the List of Types of Economic and Other Activities at Checkpoints Across the State Border of the Kyrgyz Republic" dated September 14, 2020 No. 484
- **Decree** of the Kyrgyz Government "On approval of the Rules of the border regime and the regime of the border strip of the Kyrgyz Republic" dated April 4, 2016 No. 172
- **Decree** of the Kyrgyz Government "On issues of registration of foreign citizens and stateless persons on the territory of the Kyrgyz Republic" dated December 19, 2016 No. 689, supplemented by the Decree of the Kyrgyz Government dated July 12, 2023 No. 349, allowing foreign citizens to register in the Kyrgyz Republic online.

In the *fourth group* of legal acts, there are many progressive norms that facilitate the entry and exit of tourists to Kyrgyzstan. There were no noticeable problems hindering the development of tourism in this group.

The *fifth group* of NLAs regulates the issues of local governments related to the tourism industry:

- **Decrees of local keneshes** approving annual and five-year plans for the use of pastures, including pasture plots for use for other purposes not related to livestock grazing (tourism and recreation);
- **Decrees of local keneshes** approving programs of socio-economic development, including tourism development on the territory of LSG bodies.

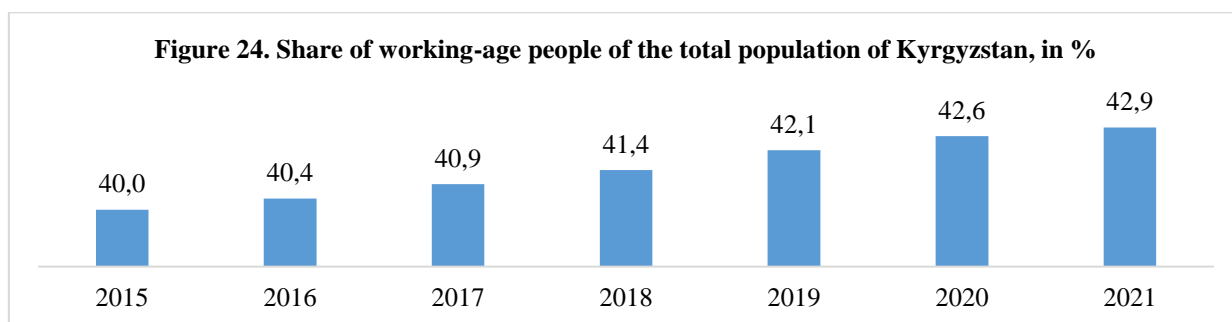
In the Osh Region, not all socio-economic development programs contain sections dedicated to tourism. Even if they do, they lack an understanding of how tourism should be developed.

The analysis of the current regulatory legal environment revealed the following **problems**:

- PR20.** The norms of the Tax Code of the Kyrgyz Republic are not very burdensome for the tourism sector, except for the catering industry, where the tax rate of 8% of turnover in the most commonly used by entrepreneurs tax regime "single tax", which is considered to be a fairly high tax rate.
- PR21.** The Law of the Kyrgyz Republic "On Tourism" was considered progressive for 1999, but its norms are behind the times.
- PR22.** The Law of the Kyrgyz Republic "On Pastures" does not allow transferring land plots of pastures for other purposes (tourism and recreation) for more than 5 years, which is not enough for the sustainable development of the tourism business.
- PR23.** The Laws of the Kyrgyz Republic "On Renewable Energy Sources" and "On the Park of Creative Industries" were adopted relatively recently and the mechanisms for their implementation have not yet been fully developed.
- PR24.** The Law of the Kyrgyz Republic "On Local State Administration and Local Self-Government Bodies" assigns many important powers for tourism development to local self-governments, but most of them are not implemented in practice due to insufficient funds in local budgets.
- PR25.** The current regulatory legal environment is not sufficiently favorable for tourism development as a priority sector of the national economy.

1.6. Problems of human development

Human resources are at the core of the social and economic development of any country. Kyrgyzstan is characterized by a rapidly growing population, a significant part of which is made up of people of working age (see Fig. 24). The key to the successful modernization of the republic's economy is to improve the educational level of able-bodied Kyrgyzstani citizens and to create decent working conditions for them. This fully applies to the tourism industry, the development of which is considered by the local authorities as one of the engines of socio-economic development of the Kyrgyz Republic.



Tourism disciplines are taught in one form or another in 15 universities and 21 vocational schools in Kyrgyzstan. At the same time, the only institution of higher education that trains specialists in a wide range of disciplines is the Bishkek Academy of Tourism. The school prepares bachelors and masters in such areas as "Tourism", "Management by sectors", "Hotel business", "Organization of service in hotels and tourist complexes". In addition, one can get a degree in "International Relations" and "English Language" with an emphasis on the tourism industry. A separate tourism department operates at the Kyrgyz-Turkish Manas University in Bishkek, training bachelors in the areas of: "Restaurant business", "Hotel business" and "Tourism".

Since 2009, Osh State University (OshSU) has been training specialists in the field of tourism in the Osh Region. The Faculty of Natural Science, Tourism and Agrarian Technologies trains bachelors and masters in tourism. Department of Economic Geography, Sector Economics and Tourism annually graduates about 20 bachelors and 7-10 masters. Besides, specialized training of specialists (about 200 students) with secondary specialized education is conducted by "STEM" Innovation college which is a part of Osh State University.

An important role in training and retraining of specialists for the tourism sector in the region is played by training programs. As a rule, they are conducted by tour operators on their own or donor funds of international organizations. To organize educational seminars, advanced training courses, prominent industry specialists, lecturers and practitioners are invited from Bishkek, CIS and far-abroad countries. Topics of trainings vary from coaching guides and ethics of working with tourists to technologies of setting up and maintenance of yurt camps. In recent years, the courses teaching the principles of green economy, basics of rural development and ecotourism are in increasing demand. Osh Travel and Open World KG are mainly specialized in organizing and conducting trainings in the Osh Region.

In the republic, there is a noticeable shortage of personnel to work in the industry at all levels. There is a shortage of highly qualified specialists capable of conducting higher education training for the tourism industry. Despite the fact that over the past 10-15 years Kyrgyzstan has established mass training of young professionals, a significant number of them do not find themselves in the industry. Tour operators in the sector as a whole experience a significant lack of tour guides (33.3%), customer service managers, sales and marketing managers and travel agents (28.2%) and translators (25.6%). Depending on the tourist destinations and seasons, these figures can add significantly.

Another, no less serious problem is associated with high staff turnover, which adversely affects the maintenance of institutional memory in destinations and, ultimately, the quality of services provided. Along with natural reasons (marriage, moving to another city), the high level of staff turnover is explained by low wages, when the most trained and promising professionals try to realize themselves outside Kyrgyzstan (mainly in Turkey and Southeast Asian countries).

Based on the results of diagnostic interviews with industry experts, the following **main problems** were identified:

- PR26.** There is still a shortage of qualified teaching staff in the tourism sector of the country.
- PR27.** There is a shortage of guides, tour guides, account managers, sales and marketing managers, tourism agents, interpreters.
- PR28.** The tourism sector of the Osh Region suffers from high staff turnover, which has a negative effect on the preservation of institutional memory and leads to a deterioration in the quality of services provided.
- PR29.** In all subsectors of the tourism industry, there is a weak managerial level, accompanied by a low corporate culture and a weak level of professional and language training of employees.

PR30. The financial literacy of entrepreneurs (in drawing up business plans, knowledge of business lending opportunities and fundraising) who want to develop the tourism business remains at a low level.

PR31. The human resourcing of the tourism industry remains at a low level.

An assessment of the staffing situation in tourist destinations, carried out based on the results of the field study, showed the following.

When correlating the following components of the "Management" factor

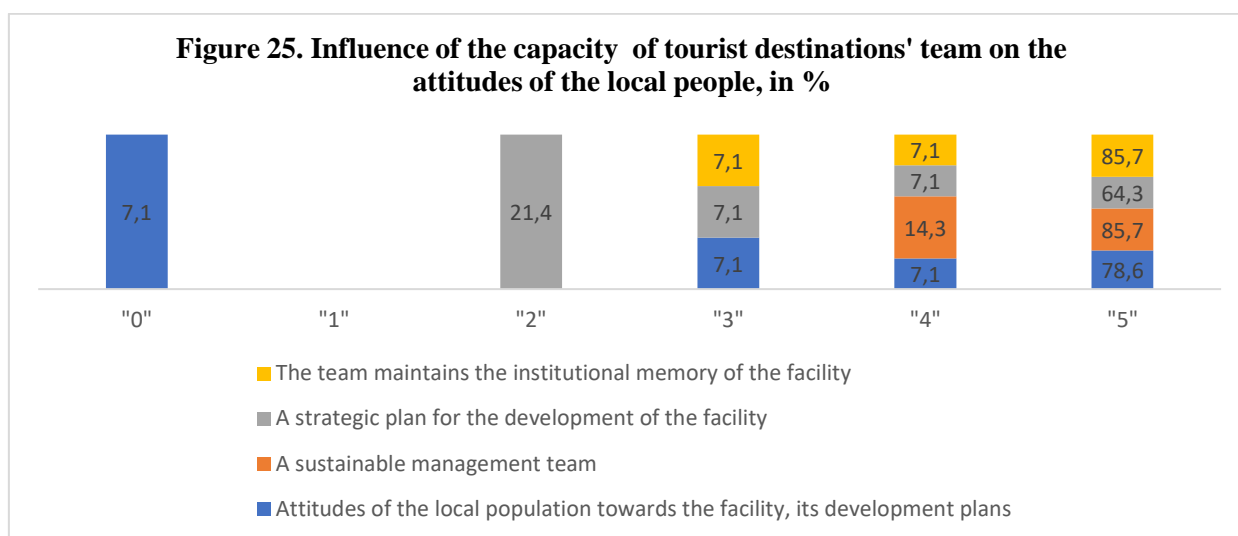
"The attitude of the local population to the object, plans for its development" ←

"Sustainable management team",

"Strategic plan for the development of the location",

"The team preserves the institutional memory of the object",

it becomes clear (Fig. 25.) that 85.7% of tourist locations have an "excellent" rating for the presence of a stable management team. The same proportion among them retain institutional memory. At the same time, 64.4% of locations have strategic development plans. All this affects the fact that 78.7% of tourist sites and plans for their development/expansion are adequately treated by the local population. At the same time, the local population is indifferent to 14.2% of destinations and their development plans (7.1% - "no way", 7.1% - "below average"), while 21.4% of destinations do not have quality strategic development plans.



The comparative analysis of these components identified the following **problem**:

PR32. Many tourist destinations lack feedback mechanisms to take into account the opinion of the population on their development. Only professional and experienced teams understand the importance of taking into account the opinion of the local population in the sustainability of destinations.

1.7. Ensuring safety in tourism

Ensuring the safety of life and health of tourists is an important element of tourism. It provides a range of measures within the framework of national legislation, guaranteeing the movement of tourists, their stay, safety of health, life and property.

In the “hazard and exposure” category of the risk index from INFORM, Kyrgyzstan is defined as a country “highly exposed” to both natural and man-made hazards⁸. On the average about 200 natural disasters occur in the republic every year, affecting up to 200,000 people and causing damage of about \$35 million⁹. Adventure types of tourism are actively developing in the republic, the main of which are: mountain climbing, hiking and skiing, recreation on Lake Issyk-Kul. At the same time, there are natural dangers and risks for tourists coming to Kyrgyzstan. For example, during the 2021 summer 81 people drowned in the country (53 in 2020). There were 329 fires in places of mass stay of people (181 in 2020). There were 65 road accidents, in which 83 people died and 155 people were injured.

All this necessitates the adoption of comprehensive security measures. In order to strengthen the image of Kyrgyzstan as a tourist-oriented country, in 2018 in Bishkek, a separate division of the internal bodies for working with tourists, the tourist police, was launched. Its task is to ensure the safety of tourists, citizens of other countries in Kyrgyzstan, as well as advice on all issues related to security and legislation.

Since 2019, the unit of tourist police was formed under the Department of Internal Affairs of Osh city. It consists of 11 employees hired through a competition. One of the requirements for tourist police officers is knowledge of foreign languages. The unit is equipped with two off-road vehicles to solve operational issues. Tourist police officers monitor the areas where foreign tourists stay most often. Interaction with local tour operators is established. Since the beginning of operation of the tourist police in Osh, more than 300 foreign nationals have been assisted in solving such issues as petty robberies, loss of money, restoration of documents and escorting tourist groups.

One of the central problems of the regional tourist sector is the issue of **training professional guides**. Currently, anyone in Kyrgyzstan can declare himself a guide or adventure tourism instructor and offer services. In practice, as a rule, such guides are skiers and snowboarders who have learned to stand on skis and snowboards and mountaineers who have “grown up” to the 2nd degree. There is no shortage of such guides and instructors. Some service providers are happy to take these “experts” to work because they can be paid less than qualified professionals. There is a shortage of qualified guides and certified instructors in the adventure tourism labor market. This is largely due to the lack of professional standards covering the activities of guides and instructors, especially in adventure tourism. In particular, the State Classifier of the Kyrgyz Republic “Types of economic activity” as such does not contain the category “guide”, other tourist specialties are not covered as well.

Another difficult issue is ensuring the safety of tourists through **search and rescue operations**. In theory, this area of work should be part of the functionality of the state bodies. Indeed, such rescue services are provided by the Ministry of Emergency Situations of the Kyrgyz Republic. Another thing is that the rescue formations of this state body are provided only on simple mountain routes and within reach of motor transport. This situation can be explained by the lack of highly qualified rescuers for work in the mountains and the shortage of an aircraft fleet.

At the same time, it should be noted that at the initiative of the TDSF the decrees of the Kyrgyz Government dated July 10, 2023 No. 345 and No. 344 were adopted. They create the legal basis for carrying out special aviation work by the Ministry of Defense of the Kyrgyz Republic, including rescue measures in tourism.

⁸ Joint Research Centre - European Commission (2021). *Subnational INFORM 2021: Central Asia and Caucasus* [Online]. Available at: <https://drmkc.jrc.ec.europa.eu/inform-index/INFORM-Subnational-Risk/Central-Asia-Caucasus>

⁹Ministry of Justice of the Kyrgyz Republic (2018) *Concept of Integrated Protection of Population and Territory of the Kyrgyz Republic from Emergency Situations for 2018-2030*. [Online]. Available at: <http://cbd.minjust.gov.kg/act/view/ky-kg/11990/20?cl=ru-ru>

The full range of rescue operations in the mountainous regions of the republic, including the Osh Region, can only be provided by one independent non-profit organization, “Rescue in the Mountains of Kyrgyzstan”, a monopolist, which raises the cost of their services. At the same time, its services do not cover all accidents. The company's participation in rescuing tourists depends on a guarantee of payment, availability of an insurance policy, compliance of the insurance program with the insured event, and availability of helicopters. Tour operators involved in rescue operations face similar problems. In addition, private firms often do not have rescue stations in places of mass congestion of tourists on mountain peaks.

Thus, the main **problems** in ensuring the safety of tourism are the following ones:

- PR33.** The absence of norms and professional standards governing the activity of guides and instructors of adventure tourism creates a high risk of accidents.
- PR34.** The ability of government agencies to provide rescue services on difficult mountain routes remains largely limited due to the lack of highly qualified rescuers and the shortage of helicopter fleet.
- PR35.** Rescue services of independent organizations are highly dependent on the financial and insurance capabilities of tourists.
- PR36.** Operational duty officers of the MES can only explain themselves in Kyrgyz and Russian languages, which is not enough to ensure the safety of foreign tourists, there is no English-language page on the website of the Ministry.

When correlating the following components of the factor "Management" according to the results of the field study, we can see that a great influence on safety is exerted by such factors as

“Ensuring public safety” ←

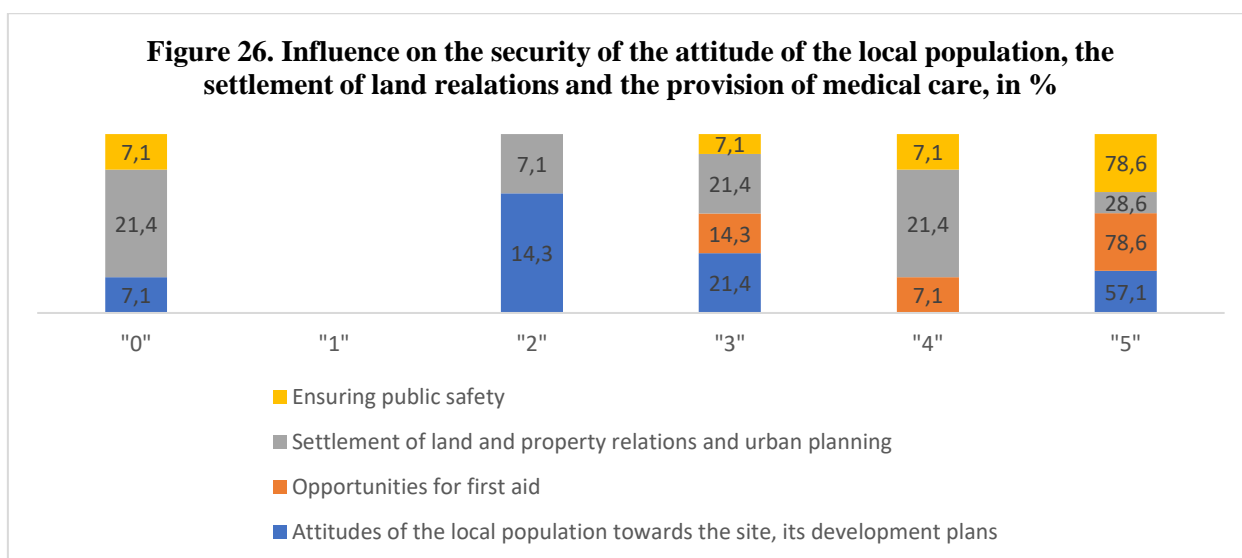
“The attitude of the local population to the object, plans for its development”,

“Regulation of land and property relations and urban planning”,

“First aid capabilities”.

The analysis shows (Fig. 26) that, for example, 57.1% of tourist destinations have security issues “in excellent condition” due to the fact that 78.6% of locations have excellent relations with the local population and settled land relationship. The values of the “First aid capabilities” component are much lower – only 28.6% of tourist destinations have the “excellent level” of first aid capabilities. In 42.8% of objects, in an equal proportion, it is either at the level of "above average" or at the "average level".

7.1% of tourist locations do not have relations with the local population, 21.4% of destinations have not yet fully regulated land and property relations, 28.5% of objects either do not have the ability to provide first aid, or they are at a level below average, 21.4% of locations are either not provided with any security, or it is at the “below average” level.



In connection with the analysis, the following **problem** can be highlighted:

PR37. There are no norms and protocols to ensure the safety of tourists in destinations, especially in adventure tourism. There are no clear and binding algorithms for providing emergency assistance to travelers.

1.8. Museum affairs and cultural heritage preservation issues

For the purposes of this Strategy, museum tourism is a type of cognitive/cultural tourism, the specificity of which lies in the use of tourist potential of museums and territories adjacent to them. Museums are cultural-educational, educational and research institutions, designed to study, preserve and use natural, material and spiritual monuments, to introduce citizens to the wealth of the national and world historical and cultural heritage.

Museums of Osh Region give the tourists the possibility to get acquainted with the representative part of culture not only of Osh city and Osh province but of the whole southern region of Kyrgyzstan and even the Fergana Valley. The promotion of museum business and its integration with the market of tourist services is the most important task of the regional tourism sector.

According to official sources, 11 museums function in the region, including one museum of republican and regional level, 5 museums of district and 2 of village level and one departmental and one school museum each. In addition, the region has other areas and monuments of architectural and archaeological significance and referring to the rich historical and cultural heritage of the Osh Region.

The National Historical and Archaeological Museum Complex "Sulaiman-Too" in Osh city and the State Historical and Cultural Museum-Reserve "Uzgen" in Uzgen city should be among the most popular museum complexes of the Osh Region. An important role in the cultural life of the Osh Region is played by the Osh Regional Museum of Fine Arts named after Turgunbay Sadykov (Osh) and Alay Regional Historical Museum named after Kurmanjan-Datka (Gulcha village, Alay district). Various exhibition, educational, cultural and awareness-raising events, including those with the participation of foreign museums and international partners, are regularly held at the above-mentioned museums.

In recent years, the regional museums have undergone a number of significant changes, which, according to experts, in the future may lead to a revival of museum business in the Osh Region:

- In 2021, the mausoleum complex of Imam Sarakhsi opened in Uzgen, which, in partnership with the Uzgen Historical and Cultural Complex, is working to attract pilgrims from near and far abroad (Muslims and students of Islam);
- In 2022, the Uzgen State Historical and Cultural Museum-Reserve was withdrawn from Sulaiman-Too into an independent cultural institution. It is noted that this will contribute to the development of this unique museum complex.
- COVID -19 pandemic has had a significant impact on the development of museum business. With the onset of the epidemic, the leading regional museums mostly switched to online mode. The pandemic helped to take a fresh look at the problems of museums, and their employees realized the importance of mastering and using information technologies.

Based on the results of *diagnostic interviews* with stakeholders, the following **problems** characterizing the development of museum business in the Osh Region were identified:

- PR38.** There are no specialized educational institutions and training programs for museum workers and cultural guides in Kyrgyzstan, which leads to low tourist attractiveness of museums in the Osh Region.
- PR39.** There is a weak material and technical base and infrastructure of museums which is reflected in dilapidated (the premises need repair, refurbishment of surrounding areas) and outdated (no elevators, ramps, etc.) infrastructure.
- PR40.** Marketing promotion of museums in the region leaves much to be desired. Museums work poorly in social networks, do not have Internet sites, do not offer information in foreign languages, are poorly oriented towards the use of interactive approaches (audio-video materials, virtual tours), do not actively promote their own attributes (souvenirs, booklets, brochures, etc.).
- PR41.** Museums of the Osh Region have very limited opportunities for self-development. They cannot engage in commercial activities (renting premises for the opening of coffee shops, specialized souvenir shops/bookstores), museum employees do not have flexible working hours.

Based on the results of *the field study* of tourist destinations of the region, a comparative analysis of the following components of the “Culture” factor was carried out:

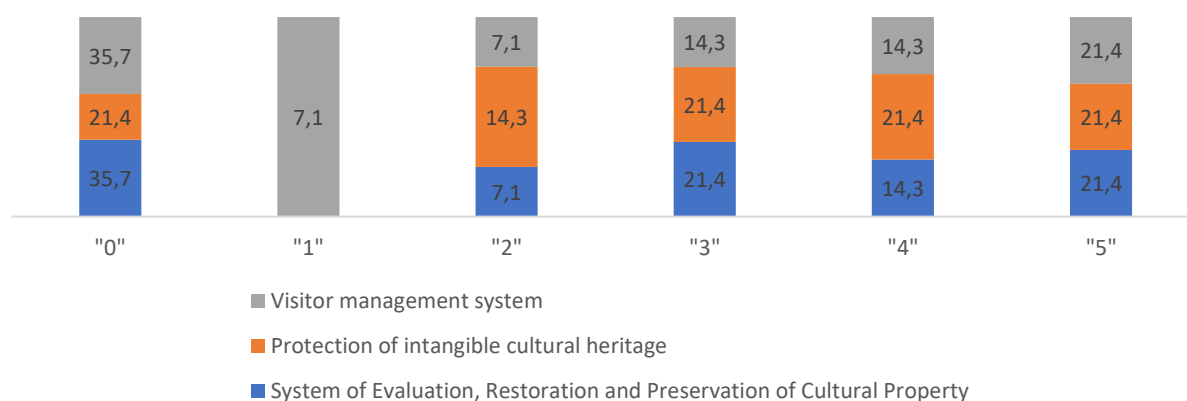
"System of assessment, restoration and preservation of cultural property" ←

"Protection of intangible cultural heritage",

Visitor Management System.

Figure 27 shows that the protection of intangible cultural heritage and the existence of a management system correlate with each other. Thus, if 21.4% of tourist destinations have the protection of intangible cultural heritage and the system of management of visitors at the level of "excellent", then their system of evaluation, restoration and preservation of cultural property is also highly appreciated.

Figure 27. Influence of the visitor management and non-tangible heritage protection systems on the preservation of cultural property, in %



In addition, the analysis showed that:

- 35.7% of tourist locations lack a visitor management system;
- 21.4% of destinations have no protection for intangible cultural heritage;
- in 35.7% of locations there is no system for assessing, restoring and preserving cultural values.

The study revealed the following additional **problems** for museums in the Osh Region:

- PR42.** Many regional museums do not meet the norms¹⁰ for the evaluation, restoration and preservation of cultural property, which is due to poor training of personnel, as well as the financing of the cultural sphere on the residual principle.
- PR43.** Many destinations in the region do not meet norms for the protection of intangible cultural heritage, as well as visitor management standards, which could reduce the burden on their already weak capacity to assess, restore, and preserve cultural property.

1.9. Marketing promotion of tourism

Over the years of independence, the Kyrgyz Republic has adopted many different programs and strategies for the development of tourism. Many of them, to a greater or lesser extent, contained elements of marketing activities, which, however, were often reduced to participation in international tourism exhibitions and organization of fairs in the Kyrgyz Republic. At present, the official document on the basis of which the Kyrgyz tourism develops is the "the 2019-2023 Program of the Government of the Kyrgyz Republic for Tourism Development", approved by the Decree of the Kyrgyz Government on January 31, 2019. Despite the coverage of various areas of tourism development, this Program in terms of marketing promotion actually repeats previous similar documents, primarily focusing on exhibition activities. It is also important to note that none of the national tourism development programs adopted to date have included measures for marketing promotion of the regions, including Osh city and Osh region.

According to experts, until recently (before the beginning of the post-pandemic recovery of the industry), the public sector of the Osh Region in matters of tourism promotion has taken a rather

¹⁰Instructions for accounting, storage of museum items and museum collections located in the museums of the Kyrgyz Republic, approved by order of the Ministry of Foreign Affairs of the Kyrgyz Republic dated December 15, 2016 No. 617.

passive position. Methods and technologies of tourism marketing were practically not applied. This is largely due to the fact that this topic is new and unfamiliar to regional government officials.

As a result, the Osh Region today is in no way represented in the global tourism market. It does not have own positioning platform - a unified tourism image, brand and a set of competitive tourism products. In the global market, few people are aware of the tourism features of the region, which are different from, for example, the tourism products of Central Asian countries that geographically, culturally and historically close to it. In this regard, Issyk-Kul, Naryn and, to a lesser extent, Chui provinces of Kyrgyzstan, which have already developed their marketing images to promote in the global tourism markets, are more successful.

Moreover, tourist opportunities of the Osh Region are successfully used by the capital's tour operators and companies from neighboring Uzbekistan and Tajikistan. The general economic effect of their activities for the Osh Region is minimal, since the main revenues from their services in the form of taxes and wages go to the place of residence. Often there are cases when tourists coming to the region are fully equipped not only with tourist equipment, but even with food. Naturally, this significantly minimizes their expenses in the region.

Currently, Osh region (its constituent parts) does not have its own tourism marketing promotion program. Tourism marketing here is limited to spontaneous festivals on culinary tourism, eco- and ethno-tourism, as well as short informational materials on local TV and radio channels, media.

The region does not have its own marketing products to generate tourist demand. There are short video clips on the Internet about the tourist potential of Osh city and separate locations of Osh province, made by Kyrgyz bloggers. These materials tend to be limited, and often lack a conceptual form, a coherent script and strategy.

The Osh Region does not have a single, unified tourism portal containing information about the recreational areas of the region, the main tourist routes and products, institutional support, rescue services, recommendations and contacts of government agencies. Tourism promotion of the region is carried out by individual private companies and enthusiasts.

The only more or less successful case in the tourism marketing of the region is the initiative of the Osh Mayor's Office, which commissioned in 2021 to develop and adopt a tourist brand "Osh - Silk Road Provider" and the branding strategy of the city. This brand was officially adopted and incorporated into the development programs of Osh. In addition, the city authorities organized and conducted a number of events and activities to "revitalize" the new city brand. Tour operators of the region participated under its aegis in international exhibitions in Almaty, Moscow, Berlin.

In 2022, the mentioned brand was proposed by the Association of Tour Operators of the Silk Road and Destination Osh for adoption as a brand of the whole Osh Region. Currently, the process of bureaucratic coordination of the issue is underway in the apparatus of the Plenipotentiary Representation of the President of the Kyrgyz Republic in Osh province.

It is expected that the positioning of the Osh Region as a Provider of tourist services on the Silk Road will give it competitive advantages on the scale of at least in Central Asia, as a single organizational and infrastructure territory where one can get not only high-quality tourist services, but also vivid impressions from acquaintance with nature and culture of the Osh Region.

Among major tourist events held in the region in recent years, the following ones should be singled out (see Table 9).

Table 9. List of tourist events held in the Osh Region

No.	Name of the event	Location	date
1	Yak and National Equestrian Games Festival	Sary-Mogol (Chong-Alay)	July 2017
2	Atchabysh festival	Lenin Peak Base Camp	July 27, 2017
3	Osh Fest - 2017	Osh city	August 19, 2017
4	Tourist festival dedicated to Nooruz holiday	Uzgen	March 20-21, 2018
5	Turkish festival	Osh city	April 22, 2018
6	Ethnographic festival	Alaykuu valley (Kara-Kulja)	May 5, 2018
7	Pilaf Festival	Osh city	June 14, 2019
8	Osh Fest - 2019	Osh city	August 17, 2019
9	International Tourism Day	Osh city	September 26-27, 2021
10	Too fest	Achyk-Tash (Lenin Peak)	July 30-31, 2022

Other major marketing initiatives in the region include the UNDP Accelerator Laboratory program, which develops a public online platform. It will contain 3D tourist maps, descriptions of sights, “self-tourism” routes, thanks to which tourists can independently familiarize themselves with tourist sites and organize their own tours. Local activists will be able to register on the platform and participate in the public life of the Osh Region.

Based on the results of *diagnostic interviews* with stakeholders, the **main marketing problem** of the region was identified:

PR44. The Osh Region currently does not have a well-established positive image and recognition in the global tourism market. There is no single marketing package to promote the region in the tourism market.

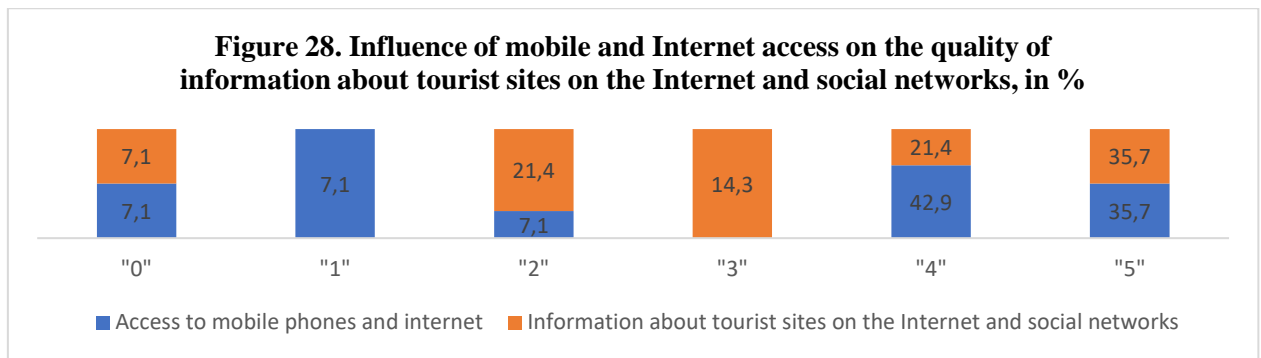
Based on the results of *the field study*, a comparative analysis of the following components of the "Economy" factor was carried out:

"Access to mobile communications and the Internet" →

"Social Media information "

The analysis of these components revealed the following correlation:

- If 35.7% of destinations have access to mobile communications and the Internet at the “excellent” level, then information about them is distributed on social networks at the same level;
- 21.3% of objects do not have the necessary level of access to mobile communications and the Internet, or they do not have them at all;



Thus, the following **problem is revealed**:

PR45. Some tourist destinations in the region lack or have poor access to mobile communications and the Internet. This, to some extent, explains the lack of information about them in social networks.

In turn, the correlation of the following components:

“Information on the Internet, social networks”,

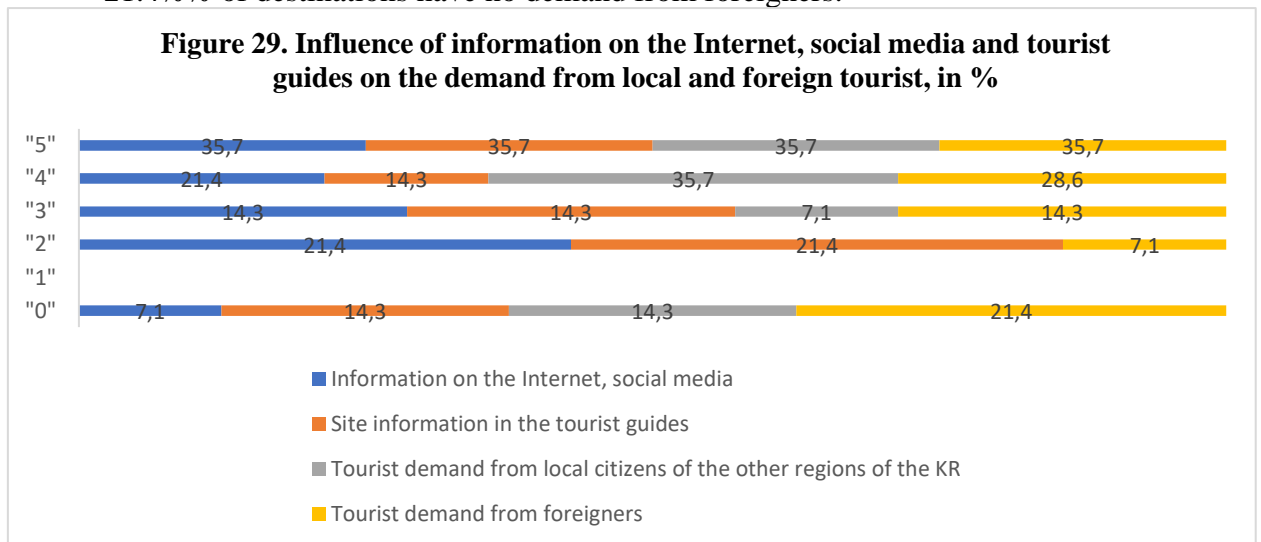
“Information about the object in tourist guides” →

“Tourist demand from residents of other regions of the Kyrgyz Republic”;

“Tourist demand from foreigners

shows (see fig. 29.) that:

- "Excellent" quality of information in 35.7% of locations, posted on the Internet, social networks and tourist guides, ensures good demand both from foreigners (35.7%) and from residents of other regions of the country (35.7%);
- A decrease in the level of quality, on the contrary, reduces tourist demand;
- 21.4%% of destinations have no demand from foreigners.



The analysis carried out suggests the following **problem**:

PR46. The lack of tourist demand for destinations in the Osh Region, both among residents of other regions of the country and foreigners, is explained by the low quality of the

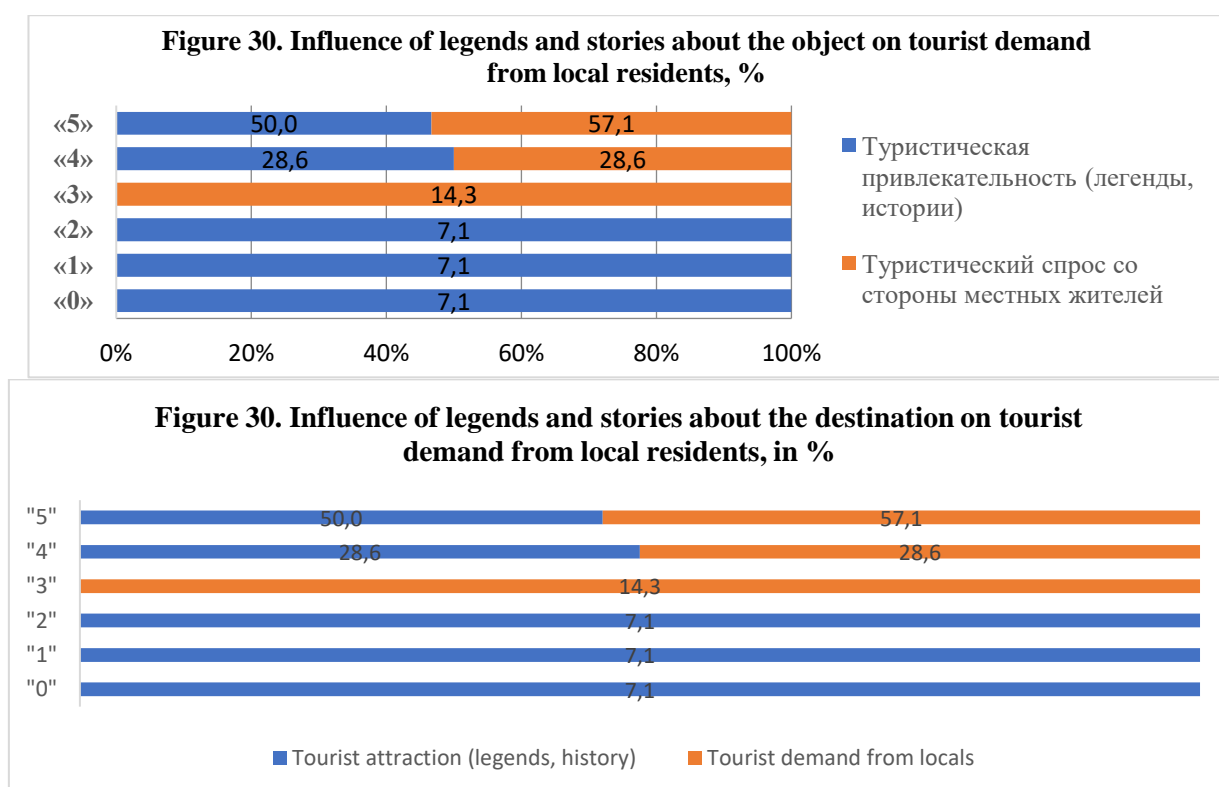
information provided or its absence on the Internet, social networks and tourist guides, which also indicates their weak customer focus.

Correlation of the following components:

"Tourist attraction (legends, stories)" →

"Tourist demand from local residents"

shows (Fig. 30) that the tourist attractiveness of objects through legends and stories has the greatest impact on the demand for visiting them by local residents. Currently, 50% of destinations have this kind of attractiveness at the level of "excellent", 28.6% - at the level of "above average" and 21.3% - in an equal share, at the level of "below average" or "poor" or do not have at all. All this suggests that not all destinations have the potential to be attractive in terms of legends and stories to attract local residents.



The above analysis revealed the following **problem**:

PR47. The Osh Region's tourist destinations make little use of legends and stories to increase tourist demand, despite the fact that literally all of Kyrgyzstan is studded with sacred places.

1.10. Environmental protection and green transition issues

Kyrgyzstan is a developing country with a so-called "brown economy", in which economic growth relies heavily on environmentally destructive forms of activity, usually concentrated in large cities. According to the generalized rating of the Environmental Performance Index for 2022 (EPI), the Kyrgyz Republic ranks 126th out of 180 countries of the world, behind all its neighbors in the

Central Asian region. According to other rating indicators, the republic ranks 110th in terms of ecosystem viability, 122nd in environmental health, and 117th in climate policy ¹¹.

Despite the availability of a large number of regulatory legal documents and strategic documents aimed at environmental protection, the environmental situation in the country as a whole tends to worsen. Against the background of the rapidly growing population, hydrological conditions are deteriorating, landfills are growing around the large cities, the amount of hazardous emissions into the atmosphere is increasing, and the average annual air temperature is steadily rising. At the same time, the funds allocated for environmental protection do not cover most of the negative consequences of human activity. In 2020, about 590 million KGS was allocated from the state budget for environmental protection. The main share of expenditures came to veterinary diagnostics (23.2%), as well as chemicalization, protection and quarantine of plants, protection of biodiversity and landscape protection (17.5% each). It should be noted that spending on environmental protection allocated from the state budget in 2020 decreased by 37% compared to 2016.

The foregoing fully applies to **the Osh Region**, where the most difficult environmental situation is observed in the city of Osh. The main problems here are the constantly growing network of car washes, the dirty waters of which are discharged into ditches and the Ak-Buura River. The city has a landfill for domestic waste, where fires of solid domestic waste occur. Toxic smoke enters the atmosphere and poisons all living things within a radius of several kilometers. At the same time, according to Kyrgyzhydromet, in Osh, air pollution does not exceed the maximum allowable concentration. However, enterprises operating in the city annually emit tons of dust, chemical compounds, and heavy metals into the atmosphere. These are soot, sulfur dioxide, ammonia, carbon monoxide, benzpyrene, formaldehyde, nitrogen dioxide, hydrogen sulfide and other substances. Many enterprises are not equipped with wastewater treatment plants, or they save energy by not fully loading them. In addition to the thermal power plant, boiler houses operate in every microdistrict of the city, most of which generate heat from fuel oil and coal during the heating season (from November to March). Thermal power plants pollute the atmosphere with emissions that contain sulfur dioxide, sulfur dioxide, nitrogen oxides, soot, as well as dust and ash, which contain salts of heavy metals.

Based on the results of *diagnostic interviews*, the following environmental **problems** of the Osh Region can be identified:

- PR48.** In the Osh Region, environmental problems caused by the consumer attitude towards nature, when economic interest "overrides" the implementation of the Law of the Kyrgyz Republic "On Environmental Protection" of June 16, 1999, are exacerbated.
- PR49.** There is no permanent monitoring of environmental conditions and there is weak interagency cooperation on environmental issues due to the low level of awareness of state and municipal employees on environmental problems.
- PR50.** Having an orographically complex territory, the nature of the Osh Region is exposed to stronger anthropogenic impacts and consequences of global climate change. First of all, it concerns melting of glaciers of Pamir-Alay, soil erosion and degradation of ecosystems.

As noted, in order to study the characteristics of the regional, the project consultants decided to conduct a field study of *14 pilot destinations* in 6 districts of Osh province and Osh city (see Map 2 and Table 10). The results of this study led to the following environmental conclusions:

¹¹Wolf, M. J, Emerson, J. W., Esty, D. C., de Sherbinin, A., Wendling, Z. A., et al. (2022). 2022 Environmental Performance Index. New Haven, CT: Yale Center for Environmental Law & Policy. [PDF]. Available at: <https://epi.yale.edu/downloads/epi2022report06062022.pdf>

- The destination sites are located in the zone of constant anthropogenic pressure and impact, where there are natural surface water sources. They are located at a sufficient sanitary distance from residential areas and livestock farms. Due to the absence of socially significant facilities (hospitals, schools, preschool institutions, etc.) in the immediate vicinity of the sites, the possible impact of noise and / or vibration is not expected.
- Based on the environmental, socio-economic and other consequences of the planned activities, as well as the predicted changes in the natural and socio-economic situation, it is possible to talk about the possibility and feasibility of implementing project activities in the proposed areas/facilities.

At the same time, destinations 10 and 13 are among the sites where projects can have a negative impact on the environment. Their implementation will take place in a complex biophysical environment with relatively high and diverse risks that may have direct or indirect potential impacts on forests, natural habitats, geomorphology, soils and waters of specially protected natural areas.

Table 10. Assessing the destinations' compliance with the Environmental and Social standards of the World Bank¹²

No.	Destination name	Suggested environmental and social risk assessments
1	Kurmanjan-Datka Museum (Alay)	Low
2	Sulaiman-Too (Osh)	Low
3	Sary-Mogol (Alay)	Low
4	Rice mill (Uzgen)	Low
5	Eco-farm Alaiku (Kara-Kulja)	Low
6	Waterfall Abshyr-Ata (Nookat)	Low
7	Duldul-At (Aravan)	Low
8	Fortress Kul-Datka (Chong-Alay)	Low
9	Uzgen historical and cultural complex	Low
10	Ryan Eco Resort (Alay)	Significant
11	Kara-Shoro National Park (Uzgen)	Low
12	Panoramic cafe "Paris" (Osh)	Low
13	Kyrgyz-Ata National Park (Nookat)	Significant
14	Children's camp in the Charbak grove (Aravan)	Low

The rest of the properties are classified as having a low likelihood of adverse environmental impacts where the impacts will be temporary and of moderate magnitude, predictable and easily mitigated. Social impacts are expected to be typical of minor construction or rehabilitation works, temporary in nature and site specific, and can be easily mitigated through the application of good construction practice and appropriate construction mitigation measures. All social risks are identifiable and can be mitigated.

¹²The assessment was carried out in accordance with the requirements of national environmental legislation and the World Bank Environmental and Social Standards (WB ESS). The standards set out requirements for a borrower to identify and assess the environmental and social risks and impacts associated with Bank-supported projects.

The WB classifies all projects into one of four classifications: high risk, significant risk, moderate risk or low risk. This takes into account such points as the type, location, sensitivity and scale of the project; the nature and extent of potential environmental and social risks and impacts; and the ability and willingness of the borrower to manage them.

In addition, based on the results of the *field study*, a comparative analysis of the following components of the "Ecology" factor was carried out:

“Monitoring the impact of tourism on the environment” →

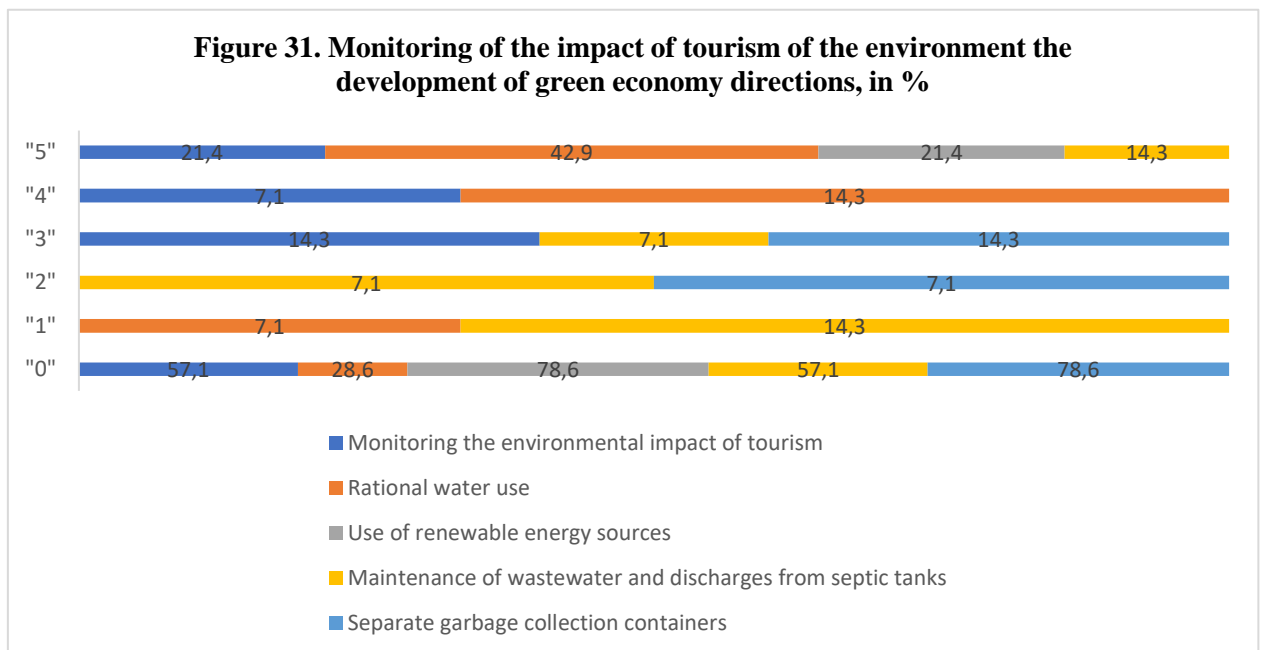
"Rational water use",

"Use of renewable energy sources",

"Sewage and septic discharge service",

“Separate waste collection bins”.

Figure 31 shows that currently 21.4% of tourist sites have a system for monitoring the impact of tourism on the environment at the level of "excellent". This is also reflected in the fact that 42.9% of destinations at the same level ensure rational water use, 21.4% of locations use renewable energy sources, and 14.3% of objects use septic tanks to disinfect wastewater and discharges.



However, there are problems with separate waste collection. 57.1% of objects have no such monitoring system (separate garbage collection) at all.

As a result, 28.6% of destinations do not adhere to rational water use, 78.6% do not use renewable energy sources, 57.1% do not treat wastewater and discharges, 78.6% do not use containers for separate collection garbage.

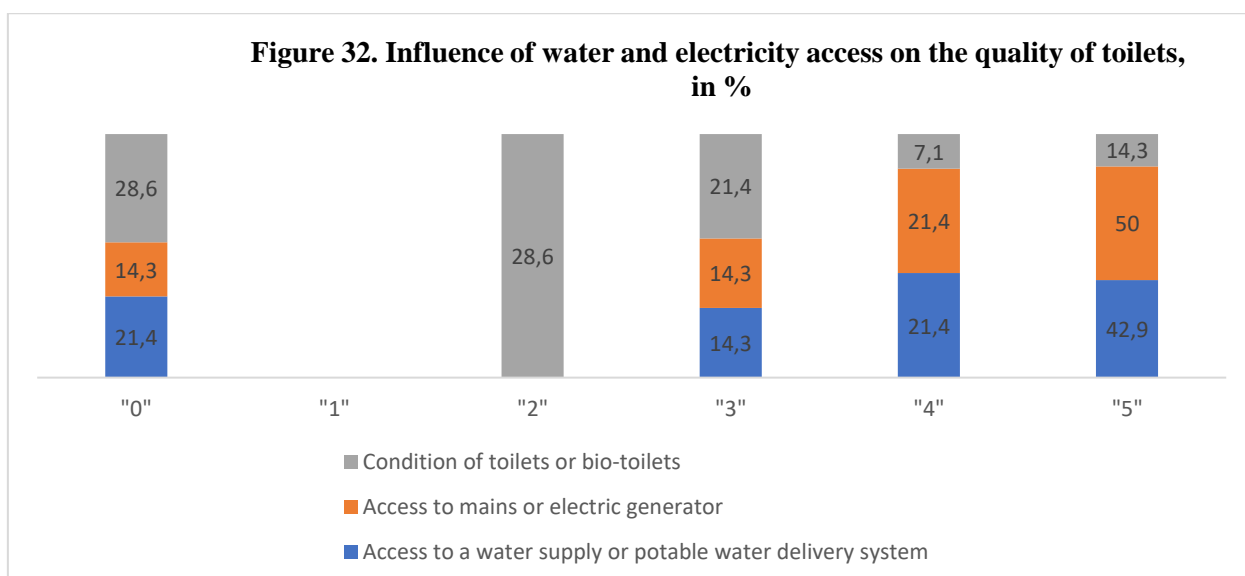
In addition, when correlating the following components of the "Economy" factor:

« Access to toilets or dry closets » ←

"Access to piped water or drinking water delivery",

"Access to the mains or power generator",

the following situation was revealed (see Fig. 32):



- Even the “excellent condition” of 42.9% of destinations having access to running water and 50% to electricity provides only 14.3% of the facilities with toilets in “excellent condition”;
- While 14.3% of destinations have “average” access to running water and electricity, only 21.4% of properties have “average” toilet quality, while 28.6% of destinations have below “average” quality;
- 21.4% of tourist destinations do not have access to running water and running water;
- 14.3% of locations do not have access to electricity;
- 28.6% of destinations have no toilets at all.

In view of the above, the following **problems** can be highlighted:

- PR51.** The current system for monitoring the impact of tourism on the environment does not cover all tourist destinations with a systematic environmental audit, and also does not fully measure all aspects and indicators of green economy.
- PR52.** Even with at least an average level of access to running water and electricity, most of the tourist destinations in the region do not have a culture of providing tourists with modern toilets.
- PR53.** In destinations, there is a generally unfavorable situation with the disposal of household waste and the maintenance of sewage.
- PR54.** Some tourist destinations do not have electricity, and as a result they are forced to use diesel and gasoline generators, further polluting the environment.

The Kyrgyz Republic is trying to keep up with global trends, one of the most important of which is **the green transition** and the introduction of the **principles of green economy**¹³.

Over the past 5 years, a number of important measures have been taken on this track by government agencies of Kyrgyzstan in close cooperation with civil society and the private sector. In particular, the Decree of Kyrgyz Government dated 30 January 2020 No.46 established the

¹³Green economy is an interpretation of the concept of sustainable development, which brings together the issues of economic, social and environmental development. It is about creating an economic system built to include environmental and social factors. This should reduce pressure on the environment, help preserve and restore natural ecosystems, and increase natural capital. Also, the measures of green economy imply a reduction in inequality, an improvement in the quality of life, working conditions, and the availability of social services.

Coordinating Council on development of green economy and climate change. The purpose of its establishment was to make decisions on the development and effective implementation of policies on these issues based on coordinated actions of the executive authorities, local self-government bodies, NGOs and international organizations.

A number of strategic documents were developed and adopted that regulate the implementation of the principles of green economy in Kyrgyzstan:

- The concept of "Kyrgyzstan - a country of green economy", approved by the Decree of the Jogorku Kenesh of the Kyrgyz Republic dated June 28, 2018 No. 2532-VI;
- "Green Economy Development Program in the Kyrgyz Republic for 2019-2023", approved by the Decree of the Kyrgyz Government dated November 14, 2019 No. 605.

As part of their implementation, the following normative legal acts were adopted:

- Amendments to the Land Code of the Kyrgyz Republic and the Law of the Kyrgyz Republic "On Pastures", which provide legal grounds for the development of 500 thousand hectares of unproductive pastures for perennial plantings;
- Law of the Kyrgyz Republic "On Renewable Energy Sources" dated June 30, 2022 No. 49;
- Amendments to the Tax Code of the Kyrgyz Republic to exempt suppliers and importers of energy-efficient and resource-saving equipment from VAT and from paying 50% taxes on real estate that meets energy efficiency standards.

In the Osh Region, economic activity using green technologies is still at an early stage. At the same time, the regional tourism sector can boast of a number of successfully implemented projects, including:

- One of the flagship hotels in Osh, Osh Nuru, met the needs for hot water supply by 60% through the installation of solar collectors. The same hotel has a solar power plant to provide off-grid electricity. In addition, energy-efficient insulation of the hotel building was made and heat pumps were installed to evenly supply heat throughout the building.
- Many destinations in the Osh Region (Sary-Oi, Alaykuu, Tulpar-Kul, Taldyk Pass, etc.) - yurt camps, campsites and glamping sites - have begun to install solar collectors and micro-hydroelectric power stations instead of diesel and gasoline generators.

An important role in the implementation of green technologies in the Osh Region is played by international development institutions. With their technical assistance and financial support, many multi-format projects are being implemented in the region, including:

- GIZ program of "Green Economy and Sustainable Development of the Private Sector in Kyrgyzstan" is aimed at the intervention of "green" measures in agriculture and tourism;
- Within the framework of the Helvetas Bay Alay project, a set of measures was implemented to promote the principles of a green economy in the field of tourism in Alay and Chong-Alay districts;
- Within the framework of the OECD project "Low-carbon public spending at the national level in Kyrgyzstan", a green public investment program is being developed with the participation of the Government of the Kyrgyz Republic and the GREEN Action Task Force. It is planned to supply 17 trolleybuses and 170 buses running on liquefied natural gas to Osh in order to replace the outdated fleet. The total investment in the pilot phase is estimated at USD 59.36 mln, of which 29.58 mln will be invested by the state.

At the same time, *the diagnostic interviews and expert assessments* conducted as part of the project show that the implementation of the principles of green economy in the Osh Region faces a number of challenges, the **main ones** are as follows:

PR55. The introduction of "green" technologies, despite the adoption of strategic documents and legal acts, is slow. In particular, renewable energy sources are currently not used even by 1% in Kyrgyzstan as a whole ¹⁴.

PR56. A noticeable obstacle to the implementation of the principles of green economy in the region is the low environmental awareness of the population, state bodies and representatives of the tourism industry about advanced technologies and financial instruments for their implementation.

1.11. Transport infrastructure of the Osh Region

The transport system of the Osh Region consists of automobile, air and rail transport means.

Automobile transport. The geographical location of the Osh Region has paved the way to the creation of the following four *transport corridors*, which play an important role in the system of international land transport and logistics:

1. The *Bishkek-Osh highway (667 km)* is of major strategic importance, providing a transport link between the northern and southern regions of Kyrgyzstan. The road is a mountain route of increased complexity with regular ice, avalanches and rockfalls. The Too-Ashuu and Kum-Bel passes are the most difficult areas for movement and operation.

2. In 2014, the construction of the *alternative "North - South" highway (433 km)* began between the northern and southern regions of the country. The road will run along the route Balykchy - Kochkor - Chaek - Aral - Kazarman - Jalalabat. It is expected that it will solve the following tasks:

- to become an alternative transport corridor between the south and north of the country, bypassing the border areas;
- to contribute to the development of the interior of the Kyrgyz Republic, including by improving access to deposits such as the Sandyk aluminum and Kara-Keche coal fields;
- provide a safer way, bypassing Too-Ashuu and Ala-Bel passes.

3. The *Osh-Sarytash-Erkeshtam highway (258 km)*. Part of this road passes through the well-known and popular Pamir Road (M41) and provides transit between China and Uzbekistan (China-Erkeshtam-Osh-Andijan-Tashkent-Samarkand-Bukhara).

4. The *Pamir Highway (1200 km)* is a high mountain road connecting the cities of Osh, Khorog (Tajikistan) and Dushanbe. The Pamir Highway runs along the border with Afghanistan and China and is part of the M41 highway. Most of the Pamir Highway passes through the territory of Tajikistan (section Khorog - Dushanbe - Western Pamir Highway), while the largest number of traffic falls on the section Khorog - Osh (Eastern Pamir Highway). In mountainous areas and branches of the main route, the road is unpaved and is not used in winter due to the danger of avalanches.

In addition, several *intra-regional highways pass through the Osh Region*, such as:

- Osh - Uzgen - Kara-Kulzha - Alaykuu;
- Osh - Kara-Suu - Jalalabat;
- Osh - Nookat - Kyzyl-Kiya - Batken;
- Osh - Gulcha - Sary-Mogol - Daroot-Korgon - Karamyk.

There are two bus stations for suburban and intercity traffic in Osh:

¹⁴Green Innovation in Kyrgyzstan's Tourism: Benefits and Prospects (2021) Tian Shan Policy Center. October 8 [Electronic resource]. Access mode: https://www.auca.kg/ru/tspc_news/4776/ (In Russian)

- The "old" bus station is located near the central market and serves routes in the direction of the Alay Mountains (Sary-Tash, Sary Mogol, Daroot-Korgon, Lenin Peak, etc.);
- The "new" bus station is located in the northern part of the city and serves routes in three directions:
 - routes to the west (Nookat, Aravan, Kyzyl-Kiya, Batken, Aidarken, Kadamzhay, Isfana);
 - routes in the northeast direction (Kara-Suu, Uzgen, Kara-Kulja, Ala-Buka, Toktogul, Sary-Chelek, Kerben, Tash-Kumyr, Jalalabat, Arstanbap);
 - routes towards Andijan (Uzbekistan).

According to *expert estimates*, the automobile transport of the Osh Region in terms of the interests of tourism development is characterized by the following major **problems**:

- PR57.** The bus stations in Osh are in poor condition. Among their shortcomings are the poor quality of paving and road surface, lack of customer-oriented and inclusive infrastructure (poor navigation, non-working toilets, lack of benches and hardscaping).
- PR58.** Public transport means (minibuses, cars) mostly do not meet international safety and environmental standards.
- PR59.** In the cities of the Osh Region, the issues of organizing parking spaces have not been regulated. Chaotic parking has a negative impact on urban mobility and street traffic.
- PR60.** The quality of sidewalks and, in general, the pedestrian infrastructure in the cities of the region leaves much to be desired.
- PR61.** There is a poor quality of regional and local roads to tourist destinations and the scarcity of roadside infrastructure - the lack of navigation in foreign languages and rest points with comfortable and inclusive toilets, Internet access, charging stations for gadgets and tourist information stands.

The **railway network** of the Osh Region is integrated with the Uzbek railway system and is important for bulky freight traffic to the region, especially for the Osh thermal power plant. Its total length is 30 km.

Passenger transportation services have not been carried out since 1993 because of high material and time costs from border, customs and other inspections on international railway routes. In this connection, the idea of building the "North-South" railroad along the line Balykchy - Kochkor - Chaek - Jalal-Abad - Osh, involving the formation of an intra-state network of railroads, arose. If the project is implemented, the route from East Asia to the Middle East and South Europe will be reduced by 700 km. At a more elaborate stage is the project for the construction of the railway line "China - Kyrgyzstan - Uzbekistan", which is planned to be implemented as part of the initiative "One Belt - One Way" (see Table 11).

The implementation of the project will lead to the following expected results:

- Reduction of cargo transportation distance from China to Uzbekistan and regional countries by 1,358 km (from 1,831 km to 473 km);
- Reduction of cargo transportation distance from China to Europe by 1000 km;
- Increased competitiveness of transport routes in the region through further growth and development of multimodal transportation.

Table 11. China-Kyrgyzstan-Uzbekistan Railway Project details

The length of the railway line (on the territory of the Kyrgyz Republic)	473 km
Type of thrust	Diesel locomotive
Path slope	up to 27%
Stations and sidings	24 units
Man-made structures, including:	1,421 pcs.
- tunnels (pcs/km);	29 pcs.
- bridges;	90 pcs.
- viaducts (pcs/km);	6 pcs.
- culverts (pcs/km).	1,296 pcs.
Project implementation timeline for parallel design	8 years
Preliminary costs for the project:	USD million
- with cargo transshipment at Dostuk station;	4,800.0
- with cargo transshipment at the Jalalabat station.	5,180.0
Average annual revenue from transportation:	USD million
- version with Dostuk station;	407.7
- version with Jalalabat station.	325.5

Air Transportation. Osh International Airport is the second largest airport in Kyrgyzstan and currently the largest air hub in the Fergana Valley, which includes southern Kyrgyzstan, northern Tajikistan, and the Fergana, Namangan and Andijan regions of Uzbekistan. The airport has regular flights to Bishkek and dozens of major Russian cities (Moscow, St. Petersburg, Kazan, Samara, Ufa, Astrakhan, Sochi, Minvody, Ekaterinburg, Chelyabinsk, Kemerovo, Nizhnevartovsk, Omsk, Tyumen, Surgut, Novosibirsk, Krasnoyarsk and Irkutsk) and the Middle East (Istanbul, Dubai, Kuwait and Sharjah). Charter flights to Delhi (India), Antalya (Turkey) and Jeddah (Saudi Arabia) have been established.

In 2022, the Osh branch of JSC "Manas International Airport" served 2 million 339 thousand passengers. The domestic passenger traffic amounted to 764 thousand, and 1 million 575 thousand passengers on international flights. As compared to 2021, this figure increased by 33.6% and became a record for the airport. A total of 16.6 thousand flights were made through the airport, including 6.3 thousand domestic and 10.3 thousand international flights.

In 2012, the airport began work on the reconstruction and expansion of the terminal complex. The waiting and arrival areas, the airport car park, the border control zone and the runway were expanded (the current characteristics of the airport are given in Table 12).

At the moment, the Osh airport's terminal has:

- terminals and ATMs (KICB, Demir Bank, Optima, Rosinbank, Kyrgyzstan);
- office of "Bakai Bank" OJSC with an exchange office;
- 2 food outlets.

Table 12. Characteristics of Osh Airport

Runway size	3 212*45 m
Runway, type of coverage	asphalt concrete
Apron area	59 200 m ²
ICAO classification	4D

Number of taxiways	3
Availability of a VIP terminal	Yes
Distance to checkpoint "Dostuk"	8 kilometers
Distance to Osh city	9 km
Availability and quality of transfer between the airport and Osh	2 minibuses (107,142) and taxi
Throughput, person/hour	550-600
Parking	Paid 600 parking spaces Free 100 parking spaces
Ventilation/Air conditioning	Yes. Needs improvement
Luggage storage	No
Lost & Found (Luggage Search)	Yes
mother and baby room	Yes
souvenir shops	No
Inclusion	No teleports, ambulifts

According to *expert assesments*, the air transportation of the Osh Region in terms of the interests of tourism development is characterized by the following major **problems**:

- PR62.** Lack of institutional and infrastructural capacity of the airport limits the attraction of new airlines, including European ones.
- PR63.** The Osh-Bishkek route is served by an outdated aircraft fleet. The limited choice of air carriers and high demand often lead to a shortage of air tickets on the route.
- PR64.** There are disruptions to air travel services in harsh climatic conditions, especially during dense fog.
- PR65.** Low level of customer orientation of the airport: long check-in and passport control, limited possibility of cashless payments, poor outdoor navigation, poor condition of toilets and air conditioning systems of the airport, weak sound alerts.
- PR66.** Lack of luggage storage facilities in case of flight cancellations and delays inconvenience airport visitors.
- PR67.** Lack of special parking for tourist buses at the airport.
- PR68.** The airport lags behind in terms of ensuring inclusiveness, there are no elevators for the safe and comfortable service of visitors with limited mobility who are not able to get on and off the plane by themselves.
- PR69.** Issues of integrated planning and integrated infrastructure management in the Osh region are poorly developed.

CHAPTER 2. STRATEGIC VISION FOR THE SECTOR DEVELOPMENT

2.1. Systematization of the main development problems

The situational analysis of the Osh Region's tourism sector, presented in Chapter 1, identified 69 major problems (see Appendix 2a). The vast majority of them can be attributed to the so-called problems-symptoms, that is, side effects or consequences of the presence of really large structural challenges. The analysis of the identified problems allows us to identify the following **root-cause problems**:

- PR8.** The process of tourism promotion has generally weak institutional support and does not correspond to the status of this industry as a priority sector of the economy.
- PR24.** The Law of the Kyrgyz Republic "On Local State Administration and Local Self-Government Bodies" assigns many important powers for tourism development to local self-governments, but most of them are not implemented in practice due to insufficient funds in local budgets.
- PR25.** The current regulatory legal environment is not sufficiently favorable for tourism development as a priority sector of the national economy.
- PR31.** The human resourcing of the tourism industry remains at a low level.
- PR44.** The Osh Region currently does not have a well-established positive image and recognition in the global tourism market. There is no single marketing package to promote the region in the tourism market.
- PR48.** In the Osh Region, environmental problems caused by the consumer attitude towards nature, when economic interest "overrides" the implementation of the Law of the Kyrgyz Republic "On Environmental Protection" of June 16, 1999, are exacerbated.
- PR55.** The introduction of "green" technologies, despite the adoption of strategic documents and legal acts, is slow. In particular, renewable energy sources are currently not used even by 1% in Kyrgyzstan as a whole.
- PR69.** Issues of integrated planning and integrated infrastructure management in the Osh region are poorly developed.

At the same time, each of these root cause problems represents some direction: PR8 - institutions, PR24 - finance, PR25 - law, PR31 – human resources, PR44 - marketing, PR48 and PR55 - environment and new technologies for its protection, PR69 - infrastructure.

Using *the prioritization method* (described in Appendix 2b), the consultant built their **priority rating**. After some reformulation of the root cause problems and combining PR48 and PR55 into one problem, they look as follows:

Place	Problems	Points
1.	Human resourcing in the tourism industry remains at a low level	2
2.	The tourism promotion process has weak institutional support	2
3.	Current regulatory legal environment is not sufficiently favorable for tourism development as a priority sector of the national economy	2

4.	Low level of the popularity of green economy principles, and their poor implementation in practice	0
5.	The Osh Region is poorly promoted in terms of marketing	-1
6.	Financing of the regional tourism sector, despite the declared priority, continues to be carried out on the leftover principle	-1
7.	Issues of comprehensive planning and integrated infrastructure management in the Osh Region are poorly developed	-4

The table shows that the first places in this rating are occupied by three problems, namely related to **human resourcing** (their shortage, low level of training, turnover), **the work of institutions** (their imbalance, lack of an integrated vision, directive approach to management) **and the regulatory legal environment** (lack of flexibility in regulation, legal gaps, outdated nature of individual laws). According to the consultant, it is these problems that create the main obstacles to the sustainable development of the regional tourism sector, whereas their immediate settlement can contribute to the solution of other problems.

2.2. Setting target benchmarks and defining guidelines

The **vision** for the future of the tourism sector of the Osh Region was formulated according to the principle: "To achieve the impossible, one must go beyond the limits of possibilities!". This proactive and progressive approach ensures that:

- *By 2028, the Osh Region will become the leading provider of tourist services in the Ferghana Valley and the Pamir-Alay Highway*

The **catalyst** for moving toward this vision should be the slogan:

- ✓ *Ош аймагы - маданияттын ар түрдүүлүгүн сезиңиз!*
- ✓ *Osh region – feel diverse cultures!*
- ✓ *Ошский регион – ощути разнообразие культур!*

Taking into account the fact that the tourism sector of the Osh Region is at an early stage of its development even in comparison with other regions of Kyrgyzstan, as well as the markedly limited state resources for its development, measures to support it should be well thought-out and aimed at achieving concrete results. Therefore, the following **guiding principles** should be followed at all stages of the implementation of the STDSP:

- ❖ *An integrated approach to the development and management of the region's tourism sector*

It is extremely important for the Osh Region to get rid of not the most attractive reputation and dispel the common perception that the tourist services offered here are non-exclusive and of low quality. The tourism sector of the Osh Region should be developed within a well-coordinated and integrated approach to management based on the interests of all stakeholders, close interaction between public authorities, local communities, private and civil sectors.

- ❖ *Sustainability as a cross-cutting element of all aspects of tourism industry development*

According to UNWTO, sustainable tourism is defined as "tourism that takes into account its present and future economic, social and environmental impacts while meeting the needs of today's tourists, the tourism industry, the environment and the host communities".

The principles of sustainable development are applicable to all areas and forms of tourism in the Osh region. The issues of natural resource use and preservation of the environment, technological change, human capital development, and institutional reforms are coordinated with each other and strive for a point of equilibrium.

❖ *Orientation to the standards of creative, green and digitalized tourism*

Green economy aims to increase people's well-being while reducing environmental risks through the introduction of modern technologies in land and water use, energy, transportation, construction and waste management.

Tourism as an experience industry is focused on freedom of entrepreneurial freedom, and creative thinking, which creates intangible values with high added value and stable global demand.

Modern digital technology permeates all parts of the tourism industry, making them accessible and usable by an unlimited number of customers.

❖ *Tourism as a cross-sectoral industry and a basis for community development*

Establishing direct links between tourism and the sectors of agriculture, trade, crafts and handicrafts creates value chains with economic benefits for more producers of goods and services in the region.

Support for private initiatives, bringing to local communities the understanding of tourism as an independent highly profitable business and a means of development provides better economic results for households involved in the tourism industry.

➤ *Developing human capital and promoting inclusiveness*

Investing in human development is the key to the sustainable development of the sector in the interests of all parties: tourists as recipients of better services, businessmen as recipients of higher profits, and the state as a collector of increasing taxes and fees.

The widespread introduction and promotion of the principle of inclusiveness through the participation of a variety of people, including the socially vulnerable, in the functioning of the sector, makes society more equitable, and living in it - comfortable and safe for everyone.

➤ *Prioritizing quality over quantity*

Focusing on the quality and content of visits rather than the number of visits. Priority of quality over quantity reduces the risk of pressure on natural resources, avoids the cost of compensation for environmental damage, and provides a balance between the development of tourist destinations and the preservation of socio-cultural and natural values of the Osh Region.

At the final stage of the STDSP development, taking into account the analysis of all available data and on the basis of appropriate forecasting methodology (see Appendix 2c) the following **target indicators** of the regional tourism sector development until 2028 were calculated. (see Table 13):

Table 13. Target indicators for the development of the tourism sector in the Osh Region

Name of indicators	2017	2018	2019	2020	2021	2022* ¹⁵	2023*	2024*	2025*	2026*	2027*	2028*
<i>Tourism organizations and recreation facilities, units</i>												
- Osh province	12	12	15	9	17	19	22	24	27	31	34	39
- Osh city	24	22	23	20	21	22	23	24	25	26	27	29
<i>Ttravel agency services, KGS mln</i>												
- Osh province	3.0	3.0	1.0	0.2	0.5	0.6	0.8	1.0	1.3	1.7	2.2	2.8
- Osh city	15.5	35.3	16.0	31.9	3.2	22	thirty	41	56	76	104	142
<i>Services of hotels and other means of accommodation, KGS mln</i>												
- Osh province	15.0	15.3	17.6	7.4	12.9	14.0	15.2	16.5	17.9	19.4	21.1	22.9
- Osh city	115.9	111.1	120.5	64.4	80.3	82.0	83.8	85.6	87.5	89.4	91.3	93.3
<i>Number of domestic tourists, people</i>												
- Osh province	13 438	24 479	31 200	21 545	19 027	29 456	45 600	70 593	109 285	169 183	261 911	405 463
- Osh city	28 027	23 507	26 821	11 189	87 477	30 602	34 916	39 839	45 455	51 864	59 175	67 518
<i>Number of foreign tourists, people</i>												
- Osh city	4 167	4 590	6 379	951	3510	4 372	5446	6 784	8 450	10 526	13 112	16 332
<i>Length of stay, in the whole region, days</i>	4	4	4	4	3.2	3.5	3.8	4	4.2	4.3	4.4	4.5
<i>Average expenses, USD</i>	50	54	59	65	70	77	86	94	105	111	118	125

¹⁵ The sign * indicates forecast data.

In line with the vision, **the main goal** of the STDSP is defined as:

- *Increasing the recognition of the Osh Region in the global tourism market by promoting a regional brand and creating a unique experience for tourists from visiting the region*

The roadmap to its achievement (in tabular form, all practical tasks are presented in the 2023-2028 General Action Plan for the STDSP implementation, see paragraph 2.5) will be a system of logical hierarchized goals, constructed taking into account the systematization of the problems identified. In a formalized form, it can be presented in the form of the following "goal tree":

- **To improve the quality and efficiency of work with human resources, it is necessary to:**
 - In cooperation with tour operators, international organizations and government agencies of the region, to train the professions of guides, cooks and hotel business, first of all, residents of remote Alay, Chong-Alay and Kara-Kulja districts of Osh province.
 - In cooperation with tour operators and NGOs, organize regular courses (for example, on the topic "Tourism as a locomotive for sustainable economic development") and language courses for employees of state and regional administrations, managers of travel companies, etc.
 - Attract/establish a permanent system of attracting foreign teachers to educational institutions that train in tourism specialties to exchange experiences and disseminate modern international practices, including in foreign languages.
 - Develop a complex to encourage the best workers in the industry based on the organization of competitions, lotteries for trips, valuable prizes, etc.
 - Organize the educational process (including in a hybrid form) in the specialty "Museum Affairs" on the basis of the faculties of tourism.
 - Organize ongoing training courses for museum staff using international standards.
 - Gradually introduce the practice of providing consulting services in the field of tourism for state and municipal authorities.
 - Train local communities in mine rescue skills at their place of actual residence.
- **In order to increase the level of institutional support for the regional tourism sector, it is necessary to:**
 - Combine the existing Councils for the Development of Tourism under the Plenipotentiary Representation of the President of the Kyrgyz Republic in Osh province and the Osh mayor's office into the Osh Joint Tourism Development Council, OJTDC, with the inclusion in its composition of representatives of regional environmental, urban planning and transport associations, as well as giving it a number of performing functions.
 - Create territorial groups (commissions) to ensure security at tourist sites.
 - Introduce the regulation of the process of strategic planning for tourism development in the Osh Region with the assignment of coordination functions to the OJTDC.
 - Conduct a series of trainings for representatives of the tourism industry and LSG bodies on such courses as "Tourism as a locomotive of the economy", "Corporate culture", etc.
 - The NSC KR, together with local state administrations, to introduce a list and methodology for collecting and calculating additional indicators in the field of tourism in accordance with the methods used by international organizations - UNWTO, World Travel and Tourism Council (WTTC).
- **To improve the regulatory legal environment for the sustainable development of tourism, it is necessary to:**
 - Introduce amendments to the Law of the Kyrgyz Republic "On Tourism", taking into account the best world norm-setting practices in the field of tourism.

- When developing by-laws to the Laws of the Kyrgyz Republic "On Renewable Energy Sources" and "On the Park of Creative Industries", take into account the comments and suggestions of stakeholders in the field of tourism.
 - Amend laws and by-laws to change the terms for the provision of pastures for other purposes (for the purposes of tourism and recreation) up to 49 years.
 - Make changes to the Tax Code of the Kyrgyz Republic in order to reduce the tax burden on business. It is advisable to reduce the single tax rate for a public catering entity from 8% to:
 - 1) in the cities of Bishkek and Osh:
 - a) 6% - in cash; b) 4% - in non-cash form.
 - 2) in the rest of the territory of the Kyrgyz Republic:
 - a) 5% - in cash. b) 3% - in non-cash form.
 - Implement norms and professional standards governing adventure tourism guides and instructors.
 - Develop safety standards for tourists of a national and private (object) nature, indicating the areas of responsibility of state bodies and tour operators.
 - In annual plans for pasture management, approved by resolutions of local keneshes, immediately determine pasture plots for use for other purposes (tourism and recreation of citizens);
 - Expand the tourist nomenclature of the State Classifier of the Kyrgyz Republic "Types of economic activity".
- **To popularize the culture of caring for nature and promote the principles of green economy and sustainable tourism, it is necessary to:**
- Carry out long-term planning taking into account the recreational capacity and throughput of the ecological potential of the territories.
 - Conduct a systematic environmental audit of all tourist destinations.
 - Make mandatory the separate collection and subsequent removal of non-organic waste through the signing of agreements with waste collection companies, with the introduction of appropriate penalties for destinations, launch municipal programs for the separate collection of waste.
 - Regulate and implement on-site organic waste disposal technology, incl. by installing mini-treatment facilities, sewage, euroseptics, eco-toilets, etc.
 - Through the media, TV and social networks, carry out information campaigns about caring for the environment.
 - At all levels, promote the creation of legal and economic conditions for the widest possible introduction and use of renewable energy sources and other resource-saving technologies. In particular, at the municipal level, introduce motivational mechanisms for enterprises and private entrepreneurs who have introduced green technologies.
 - In cooperation with NGOs and international organizations, organize regular courses (for example, on the topics "Fundamentals of a Green Economy", "Environmental Situation in Kyrgyzstan and Central Asia", "Sustainable Energy and Renewable Energy") for employees of LSA and LSG, managers of tourist destinations, etc.
 - Encourage the planting of forests near mountain slopes and other drought- and salt-tolerant crops that slow down the melting of glaciers and contribute to the biological cleansing of the environment. For example, through financial support of such projects as the Green Climate Fund "Carbon sequestration through climate investments in forests and pastures in the Kyrgyz Republic (CS-FOR)", implemented by FAO.
 - Encourage the introduction of biogas technologies in the agricultural sector, as well as technologies that minimize tillage, preserve its moisture and organic matter through concessional lending, for example, under such state programs "Agricultural Financing".

- To stimulate the population to the careful use of water and land resources through the introduction of drip and discrete irrigation technologies, sprinkling, the use of organic fertilizers (biohumus, zoohumus, chlorella, humate), minimizing the use of agrochemicals and other harmful substances through preferential lending, for example, under such state programs as "Financing of agriculture".
- **To increase the recognition of the Osh Region in the global tourism market, it is necessary to introduce modern marketing tools:**
 - Implement a unified marketing development program in the Osh Region under the auspices of the Osh - Silk Road Provider" brand (the whole range of measures is proposed in the STDSP).
 - Launch a Tourist portal of the Osh Region.
 - Practice integrated tourist routes in regional locations based on the cluster approach (proposed in the STDSP).
 - Issue permits and passes to border areas online.
 - Implement international service quality standards in the HORECA segment.
 - In cooperation with tour operators, NGOs conduct regular courses (for example, on the topics "Tourism as a locomotive of sustainable economic development", "What the client wants", "Why marketing is important", "SMM-management") for employees of travel companies and HORECA entities.
 - Diversify tourism products and take measures to expand the duration of the tourist account through the introduction of forms of winter, as well as autumn-spring tourism.
 - On a pilot basis, conduct a marketing-oriented interpretation of the historical and cultural significance of Sulaiman-Too and the Uzgen complex to increase interest among tourists.
 - Introduce an interactive approach to the work of museums in the Osh Region when working with visitors.
- **In order to create favorable financial and economic conditions for the development of the tourism business, it is necessary to:**
 - Provide funding for the authorized state body in the field of culture on the basis of program budget financing, in order to increase the effectiveness and efficiency of its work.
 - When forming and distributing the local budget, LSG bodies should prioritize issues of local importance that have a direct or indirect impact on the development of tourism.
 - Conduct a series of trainings to improve financial and economic literacy, business plan development for potential newcomers to the tourism business, with a special focus on rural residents, youth, and women.
 - Extend public-private partnership mechanisms to the tourism sector.
- **It is important to organize work on the integrated development of the region's infrastructure, taking into account the needs of the tourism industry. For this it is needed:**
 - Within the framework of various programs, for example, the Regional Economic Development project of ARIS KR and the World Bank, to attract investments in urban infrastructure (reconstruction of Sulaiman-Too, the Uzgen complex, public spaces in Osh and Uzgen, etc.);
 - Develop regional and district plans for the development of roadside infrastructure. When developing them, it is mandatory to involve representatives of the private and civil sectors, incl. from the tourism industry. Attract private investment in the construction of roadside cafes, hotels, campsites, yurt camps, first-aid posts, gas stations, service stations and toilets.
 - Bring to its logical conclusion the project to create recreation points (rest points) with comfortable conditions - toilets, electricity, water supply, Internet, information boards and maps.

- Implement systems for monitoring and managing the land use of tourist areas using digital technologies, in particular using Geographic Information Systems (GIS).
- Organize educational programs for senior and middle-level employees of municipalities and transport companies on the courses "Sustainable and inclusive environment", "Urban planning", "Fundamentals of urban studies", etc.
- Provide navigation support for destinations (installation of billboards, directions to objects in Kyrgyz, English and Russian).
- In cooperation with the district state administrations, encourage JSC "Oshelectro" to electrify, and mobile operators to expand the coverage of mobile communications in the locations of tourist destinations, including in remote mountainous areas.
- Create paid organized parking systems, stimulate the use of public transport in large cities of the Osh Region.
- Prioritize pedestrian infrastructure. Reconstruction and construction of inclusive sidewalks, pedestrian bridges, public transport stops, selection of high-quality and sustainable types of paving, lighting and landscaping along the sidewalks.
- Modernize the Osh International Airport including the construction of a new passenger terminal with a passenger flow capacity of 1000-1500 people/hour and the integration of the airport with public transport in Osh, i.e., the creation of a multimodal transport complex based on it.

2.3. Osh Region in the context of global and regional tourism trends

The global tourism industry has developed dynamically over the past three decades, becoming one of the key drivers of globalization. This has largely been driven by the growing middle class in emerging economies and intensive technological growth.

The outbreak and rapid spread of COVID-19 in early 2020 has had the most serious impact on the global tourism industry, halving the sector's gross product from \$9.2 trillion in 2019 to \$4.5 trillion a year later. Despite a 20% growth in 2021 and an even more impressive performance in the first quarter of 2022 (80% year-on-year growth)¹⁶, the tourism industry is still far from its pre-crisis levels, when the contribution of tourism to the global economy was about 10%.

According to several researchers¹⁷, the COVID-19 pandemic, coupled with long-term trends in demographics and technology, will have a marked impact on the development of the tourism industry, shifting travelers' priorities toward closer and safer destinations that provide opportunities for secluded (or in small groups) and personalized forms of recreation. and entertainment.

As people's general level of education increases, the focus of travelers' interests changes. Tourists are looking for unique experiences, more and more focused on interaction with locals in order to learn something new, immerse themselves in other cultures, customs and cuisine.

The younger generation, the so-called millennials, are playing an ever-increasing role in the trends of the industry. The tourism interests of this cohort are closely tied to the widespread use of modern information technology, the Internet of Things, and various forms of sherry economy.

¹⁶ UNWTO (2022) *Impact assessment of the COVID - 19 outbreak on international tourism.*, [Online]. Available at: <https://www.unwto.org/impact-assessment-of-the-covid-19-outbreak-on-international-tourism>

¹⁷ Abbas J., Mubeen R., Terhemba P., Raza S. and Mamirkulova G. (2021) *Exploring the impact of COVID-19 on tourism: transformational potential and implications for a sustainable recovery of the travel and leisure industry.* Current Research in Behavioral Sciences, Vol. 2. <https://doi.org/10.1016/j.crbeha.2021.100033>

Rahman MK, Gazi MAI, Bhuiyan MA, Rahaman MA (2021) *Effect of Covid-19 pandemic on tourist travel risk and management perceptions.* PLoS ONE Vol. 16(9). <https://doi.org/10.1371/journal.pone.0256486>

More and more tourists are paying attention to the "hydrocarbon footprint" and the environmental impact of their travels. Such people give preferences to destinations with clear sustainability policies, recycling procedures and circular economy.

Summarizing the above, we can quote travel business analysts' estimates¹⁸, according to which the following main trends will prevail ***in the international tourism market in the coming years:***

1. The tourism services market is undergoing continuous *digitalization*. Online bookings are becoming commonplace, and a significant part of them are increasingly mobile, i.e., carried out via smartphones. The processes of *automation* and *introduction of modern technologies* in the areas of medical care and tourist security are actively underway/ Hand in hand with this are the processes of *personalization* of the services provided, involving maximum focus on meeting the individual needs of tourists.
2. An increasing number of tourists are focused on *sustainable development*, which, in addition to caring for the environment, ecology, also refers to the positive impact of tourism on the culture, economy and in general people in the places visited. One form of such travel is *ecotourism*. It combines people's craving for new experiences with direct participation in the support and preservation of local ecosystems.
3. *Recreational tourism*, which refers to travel focused on *personal growth, psychological transformation* of people, should also be considered a mass trend. All sorts of volunteer trips, journeys that allow people to review their diet, engage in new sports, etc. are growing in popularity. More and more tourists are focused on learning about the cultures and traditions of distant countries and peoples, getting acquainted their cuisine (*gastrotourism*), and gaining authentic experiences. Due to the expanding opportunities for remote work, many tourists are ready for *longer journeys*.
4. Both *domestic tourism* and its individual forms, such as staycation, are growing in importance. This trend gained popularity during COVID-19 and will continue into the post-pandemic period. In its most general form, staycation is a vacation spent at home rather than abroad and involves one- and two-day trips to neighboring cities and areas for sightseeing and outdoor recreation. The so-called bleisure tourism, which combines business trips with leisure, follows a similar formula.

It is obvious that the mentioned global trends will in one way or another influence the development of tourism both in the Kyrgyz Republic as a whole in the Osh Region in particular.

Tour operators are already noticing a noticeable *increase in interest with regard to domestic tourism* in Kyrgyzstan. In this respect, the Osh Region has some advantages. First of all, the city of Osh is the "southern" capital of the republic. In Soviet times, it was the administrative center of the larger Osh province, which then included nowadays Osh, Jalalabat and Batken provinces. Therefore, Osh, its history, culture and sights are of certain interest for residents of the northern provinces and Bishkek. In recent years, especially given the COVID-19 restrictions, many northerners have often taken car tours with their families to get a closer look at Osh and other southern cities. This also includes pilgrims interested in visiting sacred sites that the Osh Region is rich in.

The global trend of bleisure tourism has also been actively developing in the region in recent years. Many socio-economic programs are being implemented in Osh and in the Osh Region as a whole, and many specialists from Bishkek are involved in their work. The large number of people sent to the city is evidenced by the fact that in recent years it has not been so easy (especially at the last

¹⁸ Evolve (2021) *2022 Travel Trends Forecast*, [Online]. Available at: <https://www.prnewswire.com/news-releases/evolves-2022-travel-trends-forecast-travel-returns--but-expectations-have-changed-301401609.html>

Amadeus (2021) *Rebuild Travel Survey*, [Online]. Available at: <https://amadeus.com/documents/en/pdfs/rebuild-travel-survey-global-report.pdf>

moment) to purchase air tickets on the route Bishkek-Osh-Bishkek. The specialists arriving here, try to combine business with pleasure preferring to dilute their business trips with exploring local attractions and hiking in the countryside.

The Osh Region is still poorly fitting into the *reactionary tourist trend*. Foreign travelers interested in learning about nomadic culture, nomadism, or just a psychological reset, prefer the north of the republic, mainly the southern coast of Issyk-Kul and the Naryn provinces, to the region.

Unlike Issyk-Kul, the tourist opportunities of the Osh Region are little known to the mass segment of tourists not only in the CIS countries and in the world, but even in Kyrgyzstan itself. According to the leading tour operators of the region, most of the tourists arriving in the region (60-70%) are tourists from developed countries of Europe and America, as well as from the Far East. As a rule, such travelers buy package tours that involve visiting locations on the Pamir Highway – mountain ranges and high mountain lakes – with a one-day transit stop in Osh. Many of them go to do trekking and hiking, some want to see the beauty of the Pamir-Alay, get acquainted with the culture of nomads or just gain new impressions. Tourists with similar interests include well-to-do travelers from CIS countries, mainly from Russia. Their share in the total number of tourists has grown in recent years and is currently around 25%. A special group of tourists are mountaineers, who visit the Osh Region to climb Lenin Peak. However, their stay in the region is often strictly regulated and has the sole purpose of conquering the legendary mountain peak.

In terms of *digitalization*, the Osh Region, like the rest of Kyrgyzstan, still lags behind the leading tourist centers in Europe, Asia and Africa. In particular, not all hotels of the same city of Osh are yet integrated into CRM systems, visitors are often offered a standard set of amenities. Some opportunities to provide *personalized services* are practiced only by tour operators who work on the principles of community-based tourism and with mountaineers

Regional factors have a noticeable impact on the development of tourism in the Osh Region and, most likely, will continue to do so in the near future.

Undoubtedly, the main factor-phenomenon determining the development of Kyrgyzstan's tourism in 2022 was the dramatically increased tourist and migration flows from Russia after the start of the *Russia-Ukraine war*. The increased tourist flow can be explained by the inaccessibility (due to the increased cost, the introduction of visa restrictions) for Russians resorts in Western countries. Under these conditions, many residents of Russia prefer to spend their summer vacations in Kyrgyzstan, mainly on the coast of Lake Issyk-Kul. A noticeable number of fans of active and exotic recreation have also turned their attention to the Osh Region – in particular, compared to 2021, the number of such tourists and mountaineers from Russia has increased here.

At the same time, beginning in March 2022, thousands of young people, so-called "relocates," began arriving in the republic, who had not accepted the events taking place in Russia. This migration flow increased markedly after the announcement of a so-called partial mobilization in Russia on September 21, 2022. Due to the geographical proximity, similar mentality, the prevalence of the Russian language and the absence of visa requirements, Kyrgyzstan has become a natural refuge for them. According to the Ministry of Digital Development of the Kyrgyz Republic, only in the first week after the announcement of mobilization, about 3.5 thousand Russian citizens arrived in the republic¹⁹. According to the Osh Association of Silk Road Tour Operators, their mass arrival led to a sharp increase – by 30-40% – in the cost of renting apartments in Osh, and all hotels and guest houses in the city were reserved for several weeks in advance by guests from Russia.

¹⁹ Yusupova D. (2022) 'How the Russian mobilization affected life in Kyrgyzstan' *Kaktusmedia*, 1 October, [Online]. Available at: https://kaktus.media/doc/467775_kak_mobilizaciia_v_rf_povliiala_na_jizn_v_kyrgyzstane_istorii_i_mneniia.html (In Russian)

Experts in Kyrgyzstan's tourism market have no consensus on how sustainable these flows will be and whether they will persist in the coming years. Some market experts doubt that this trend will last for a long time. According to their estimates, many relocates use Kyrgyzstan as a transfer base for the subsequent move to Europe. Likewise, it is not clear whether tourists from the European part of Russia will come to Kyrgyzstan in 2023 if the war ends (the republic's tourist market mainly attracts tourists from the Siberian regions of Russia).

Kyrgyzstan's relations with neighboring countries have a serious impact on the development of the tourism industry in the Osh Region. In recent years, this is especially true of the republic's relations with *Uzbekistan and Tajikistan*. At the same time, if the relations with the first state are developing from cool to friendly, in the second case the dynamics is rather the opposite.

According to the Kyrgyz Prime Minister Japarov, in 2022 about 3 million Uzbeks visited Kyrgyzstan²⁰. In turn, data from the State Committee of the Republic of Uzbekistan on Statistics show that Kyrgyzstan is the most popular tourist destination in outbound tourism in Uzbekistan²¹. According to Osh tour operators, despite the fact that many Uzbeks come to visit their relatives, they should also be considered tourists, especially since they often make joint tourist trips to the mountain regions and sacred places of the Osh region.

The situation with tourist flows from Tajikistan is completely different. Since 2021, when the border conflict between the countries escalated, foreign tourists have had difficulties with crossing the Bor-Dobo checkpoint (at the Kyzyl-Art Pass). After the start of the conflict, this checkpoint remained completely closed for some time, including for third-country nationals. According to tour operators, this decision had a negative impact on the flow of foreign tourists. Prior to the conflict, a large number of travelers (5,300 people in 2019) freely (without prior notification) crossed the border and moved between the Fergana Region of Uzbekistan and the Pamir Region of Tajikistan along the Osh-Khorog highway, through the Osh Region. As a rule, they stopped for 2-3 nights in Osh, from where they went on short tours to the areas of Lake Tulparkul, Kyrgyz-Ata and others. After the tour operators appealed to the authorities of the Kyrgyz Republic, the issue of border crossing for foreign tourists was partially resolved - in August 2022, their crossing was allowed, but with the passage of a mandatory notification procedure. In line with that, it is necessary to inform the border guards about the border crossing in advance, and the process of approval takes 3-5 days. In the view of local tour operators, these bureaucratic procedures present a hurdle to the growth of the tourist flows between the countries.

2.4. Main vectors for the prospective development of the sector

Acquaintance with key tourist locations, a systematic analysis of the current state of the tourism sector, as well as expert assessments of its problems and existing opportunities, allow us to present the main vectors for the sustainable tourism development of tourism in the Osh Region.

2.4.1. SMG Model

When considering the sector's development strategy for the coming years, it should be borne in mind that the traditional motivation for beach vacations away from home, the so-called SSS-tourism ("Sun - Sea - Sand"), is gradually declining. It is being replaced by tourism with an

²⁰ 'Kyrgyzstan in 2022 was visited by about 3 million tourists from Uzbekistan' (2023) *"Kabar"*, January 26 [Online]. Available at: <https://kabar.kg/news/kyrgyzstan-v-2022-godu-posetili-poriadka-3-mln-turistov-iz-uzbekistana/> (In Russian)

²¹ State Statistical Committee: Almost half of Uzbeks who went abroad visited Kyrgyzstan' (2022) *Azattyk*, 24 July [Online]. Available at: <https://rus.azattyk.org/a/31957261.html> (In Russian)

emphasis on LLL, "Lore - Landscape - Leisure". As the general level of education of people increases, the focus of travelers' interests changes. Tourists are looking for unique experiences, more and more focused on interaction with locals in order to learn something new, to immerse themselves in other cultures, customs and cuisine.

Therefore, we propose the **SMG Tourism Development Model** for the Osh Region. It will reflect the synergy of the heritage of the **Silk Road**, the possibilities of the mountainous landscape (**Mountains**) and the diversity of gastronomy of the East (**Gastronomy**).

Model of tourism in the Osh Region - SMG:		
Silk Road	Mountains	Gastronomy
<p>The Osh Region is located on one of the routes of the Silk Road</p> <p>It combines elements of nomadic and sedentary cultures</p>	<p>The region provides ample opportunities for active and adventure tourism, including:</p> <ul style="list-style-type: none"> - mountaineering; - trekking, hiking; - ski tours and freeride; - speleotourism; - eco- and geotourism 	<p>The Osh Region is distinguished by a variety of culinary traditions of the peoples of the East.</p> <p>Kyrgyz, Uighur, Uzbek, Dungan cuisines are widely represented here.</p>

2.4.2. Territorial-cluster approach to the sector development

Taking into account sub-regional historical, cultural and geographical peculiarities of the Osh Region, as well as recommendations for the promotion of a cluster approach to tourism development, reflected in the strategic documents of NDS KR 2018-2040 and NDS KR 2021-2026, for sustainable tourism development in the Osh Region, in line with the SMG Model it is proposed to divide the region into 5 territorial tourist clusters (see Map 3):

Cluster No. 1 – “SILK ROAD CITIES”. The cluster includes major urban settlements in the Osh Region with rich cultural and historical heritage, exquisite oriental cuisine and preserved historical and architectural monuments. As a direction, the cluster is focused on cultural tourism.

The undisputed centerpiece (dominant) of the cluster is **Osh city** as the only settlement with an international airport, a significant number of hotels, guest houses and catering facilities. The *so-called hub city model* is applicable to Osh, when tourists live in the city and make day trips to nearby locations from there. Being a historical, trade and economic center of the southern region of the Kyrgyz Republic, the city offers a standard set of tourist products for such settlements in the segments of *MICE*, *gastro*, *historical*, *cultural* and *sacred tourism*.

The second most important city in the Osh Region is **Uzgen city**. Noticeably inferior to the centerpiece in terms of its tourist resources, it nevertheless provides additional opportunities for tourists visiting the region to get acquainted with the history and culture of Silk Road cities. In particular, the city is famous for its 12th-century architectural complex, picturesque views of the Kara-Darya River and the technology of growing the unique red rice called devzira. The types of tourism products offered here include *visiting the mentioned complex*, *the ancient rice mill (agro- and gastrotourism)*, *the city bazaar*, *mosques*.

To some extent, the satellite city of Osh is **Kara-Suu city**. After the collapse of the Soviet Union, the city became widely known throughout Central Asia for its huge wholesale and retail market, which is the largest in the Fergana Valley. Many tour operators in Kyrgyzstan organize *special shopping tours* with oriental flavor for foreign tourists here.

Taking into account the interests and needs of tourists, it is possible to organize 1-2 day trips to the national parks of **Kara-Shoro** and **Kyrgyz-Ata** for active (*trekking, camping, hiking*) and passive recreation (*jailoo-tourism (overnight stay in yurts, acquaintance with nomadic life), agrotourism*).

Cluster No. 2 - "PAMIR-ALAY MOUNTAINS". It covers the territory of the Alay district after the Taldyk pass along the Osh-Sary-Tash highway, the entire Chong-Alay district, as well as the mountainous part of Nookat district. As a direction, the cluster is focused on mountain adventure tourism. It is designed for trips lasting from 2 days to 2 and more weeks.

The cluster does not have a clear centerpiece, it is rather formed around 4 destinations (anchor points), each of which has guest houses, catering and leisure facilities, administrative staff including guides.

1) **The base camp of Lenin Peak in the tract Achyk - Tash** at an altitude of 3,600 m above sea level. The camp has all the necessary infrastructure (bedrooms, yurts, a first-aid post, a dining room, baths, etc.) for organizing *mountaineering trips and high-mountain trekking*.

2) **The village of Sary-Mogol/Lake Tulpar-Kul** has everything necessary for organizing *one- and multi-day trekking and horseback-riding tours* along the Chong-Alay and Alay ridges. There are opportunities for *jailoo tourism*, organization of *mountain, ethnic and yak festivals*, as well as various *auto, bike and photo tours* for fans of light adventure tourism.

3) **The village of Kojokelen** is convenient as a starting or transit point for organizing *one- and multi-day trekking and horseback riding tours* along the Kozho-Kelen valley and the Alay Range.

4) **The village of Sary-Tash** has approximately the same opportunities as the destinations of Sary-Mogol and Kojokelen, and can also serve as a transit point for accommodation and meals. In addition, there are opportunities for organizing ski tours in winter - the so-called *backcountry skiing & free ride*.

Cluster No. 3 - "ETNOTOURISM IN ALAY". The cluster covers the territory of Kara-Suu and Alay districts along the Osh-Sary-Tash highway to the Taldyk pass.

Despite a certain attachment to Osh (the main locations of the cluster can be reached by car in a few hours), the cluster has some autonomy, which is expressed in the possibility of organizing multi-day tours with overnight stays in yurt camps.

It is reasonable to focus the cluster on the development of ethno-tourism, introducing travelers to the culture and life of the Kyrgyz people. Historically, the cluster area was the center of residence of the Alay Kyrgyz and their leader Kurmanjan-Datka, a major socio-political figure of the 19th century.

The centerpiece of the cluster is the district center – **Gulcha**, which has guest houses, cafe-restaurants, as well as a cultural attraction – the richly decorated Kurmanjan-Datka Museum.

At the same time, the centers of tourism development here can be mountain valleys and gorges (the most famous of them is the Sary-Oi Valley) along the Osh-Sary-Tash highway, as well as the Chyirchyk pass.

In the mountain valleys, there is a potential for promoting ethno-tourism based on the construction of yurt camps with expanded infrastructure (baths, sports and concert venues, etc.) for organizing *weekend tours, ethno -festivals, agro-tourism*, as well as *trekking/hiking, camping/glamping*.

A distinctive feature of the **Chyirchyk pass** (located 40 km from the city of Osh, at an altitude of 2,400 m above sea level) is that in addition to small *yurt camps*, a *ski base* functions here in winter.

Cluster No. 4 - "SACRED PLACES OF OSH PROVINCE". It covers the territory of Aravan and Nookat districts.

Despite the fact that there are two large settlements on the territory of the cluster - Nookat town and Aravan village - the cluster is tied to Osh city. This can be explained by the fact that its main destinations can be reached in a few hours by car. In addition, the above-mentioned settlements do not yet have a hotel stock to accommodate tourists.

It is reasonable to focus the cluster on introducing tourists to *the sacred sites of the Osh region*. The most famous sacred places in the region are located here, namely ***Abshyr-Ata Waterfall***, the sanctuary of ancient horse breeders in ***Duldul-At*** and ***Chil-Ustun*** cave in Aravan.

In addition, ***Aravan district***, located on the territory of the Ferghana Valley, is characterized by hotter climate and early ripening of fruits and vegetables. Here, melon growing and a lot of orchards are developed, which creates conditions for the promotion of *agrotourism*.

Taking into account the interests and needs of travelers, it is possible to organize trips to the **Kyrgyz-Ata national park** and the **Kojo-Kelen Valley** for active recreation and tourism (*trekking, camping, jailo tourism, etc.*).

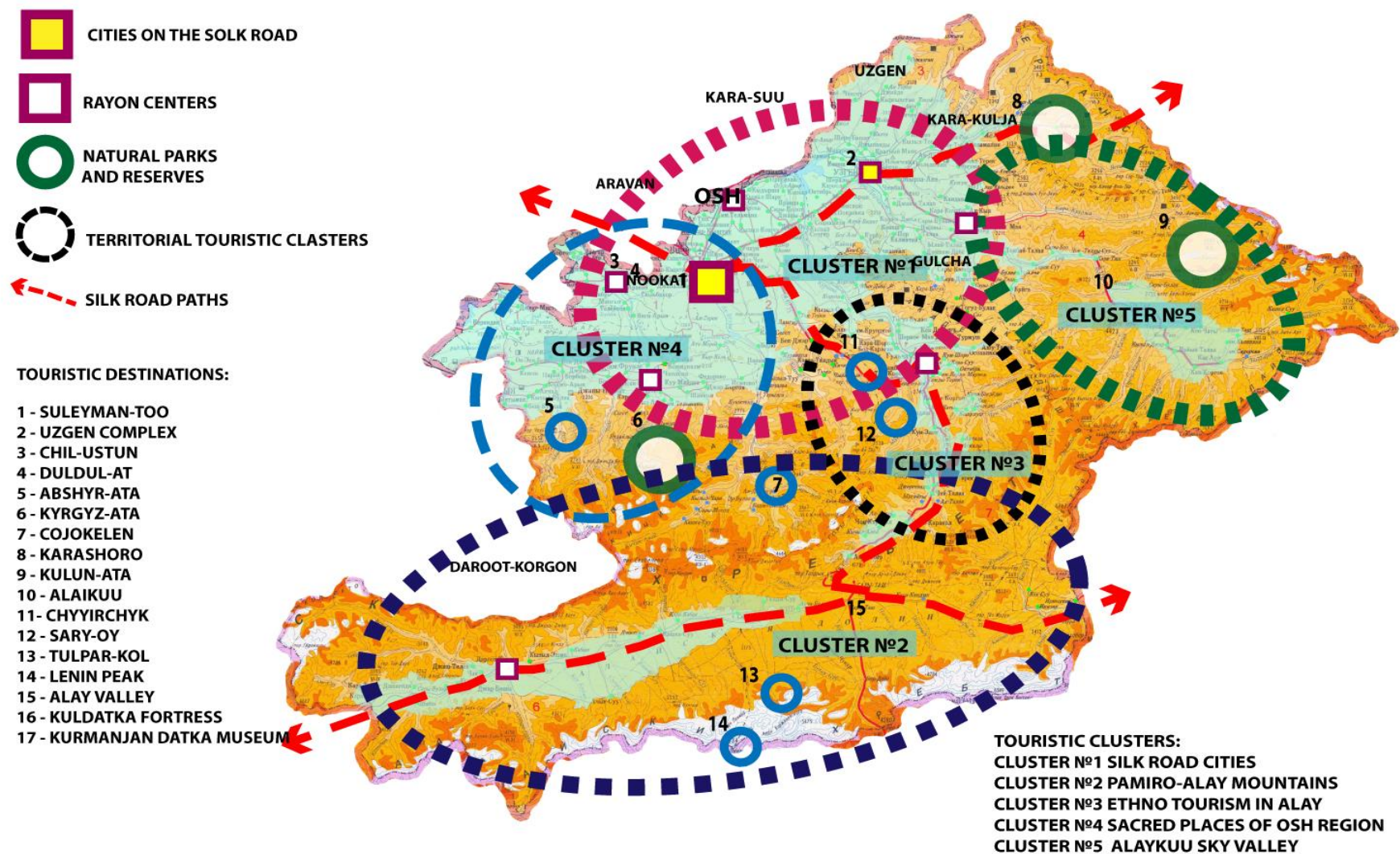
Cluster No. 5 - "ALAYKUU SKY VALLEY". Geographically, this cluster covers the territory of the Kara- Kulja district, borders on Naryn province, Alay district and China.

According to regional tour operators, the Alaikuu Valley can be classified as a destination with undiscovered and underestimated tourism potential. This is largely due to its geographical remoteness from the city of Osh. In order to get to the extreme settlement, the village of Kok-Art, one needs to drive about 4-5 hours along a dirt serpentine road.

According to the residents of this remote area, they are wary of "outsiders" for fear of losing their pristine nature. However, the district authorities are ready to contribute to the tourist promotion of this area, but with an emphasis on attracting local residents, especially young people.

The development of this cluster could be based on the model currently used in such destinations as in the aforementioned Sary-Mogol. The village of Saitalaa could become the centerpiece of the cluster. The innovative eco-farm "Alayku" has been built here and has been operating for several years. This private facility has ample opportunities for both passive and active tourism. On the territory of the eco-farm there is a yurt camp, a guest house with several rooms with all amenities, a coffee shop, a kitchen and a dairy shop.

The cluster could combine elements of *eco-tourism and ethno-tourism*. Its potential tourist products include the organization of *trekking, hiking and horseback riding tours, jailoo-tourism, and ethnic festivals*. Taking into account the low level of anthropogenic impact on the local nature, a *geopark* could be organized here in the future.



Map 3. Tourist territorial clusters of the Osh Region

2.4.3. Improving tourism statistics

An analysis of strategic and methodological documents on tourism development at the national level and in the Osh Region (see paragraph 1.4.1) shows that it is rather difficult to make systemic management decisions on sustainable tourism development based on currently collected statistical data.

The current system of statistical data collection and analysis in the country is largely based on traditional statistics. To summarize, its main indicators are ones of the volume of tourist flows, the duration of tourist stay, and some aspects of the tourist sector enterprises. In other words, the main emphasis is made on the assessment of basic indicators collected by the border service, data from accounting and statistical reports of enterprises, etc. At the same time, many other tourist industry indicators are overlooked due to objective reasons, among others. For example, the team's field study of the main tourist destinations in the Osh Region showed that such indicators as access to clean water, Internet, availability of hygienic toilets, sewage treatment facilities, introduction of renewable energy, quality of infrastructure at tourist sites remain outside of statistical observation.

Recent trends in the development of the global tourism industry (the search for sustainable forms of development, continuous digitalization, in-depth analysis of tourist preferences) require a significant transformation of tourism statistics. The need for innovative methods of collection, processing and storage of statistical data, including the use of big data capabilities, is increasingly evident. According to the consultant, when improving the system of tourism statistics in the Kyrgyz Republic and at the regional level, it is important to take into account the following considerations:

- 1) One of the effective tools for working with statistical data is *the implementation of the so-called Tourism Satellite Account (TSA)*. The methodology of compilation of TSA has been actively developed since the 1990s. In 2008, its revised version was recommended by the UN Statistical Commission for widespread implementation and use. In Kyrgyzstan, the introduction of the TSA into the system of national accounts has been studied since the early 2010s. Currently, with the assistance of development institutions and international organizations, this process has received some acceleration.

The TSA is a logically linked system of tables that assess the economic value of tourism in terms of both production and consumption. The tourism satellite account is based on the ideas of analyzing in detail all aspects of the demand for goods and services associated with tourism, tracking the relationship with the supply of such goods and services within the economy, and determining how this supply is consistent with other economic activities. The development of the TSA makes it possible to calculate specific macroeconomic aggregates (in particular, value added), ensure international comparability of statistical assessments of the development of the tourism industry, and also determine the multiplier effect of the development of the tourism industry on the national economy.

- 2) Unlike most sectors of the economy, where there is a homogeneity of products, in tourism the success of a product depends on where, when, and for what purpose it is acquired by the end consumer. In this regard, an important direction in the development of tourism statistics is the emphasis on *studying the behavioral models of travellers*. In particular, this work involves a more active and multifaceted use of the sample survey tool.
- 3) Due to the diversity and complexity of the tourism industry, a separate task is *the statistical accounting of "hidden" tourists*. At the regional level it is much more difficult to measure tourism indicators than at the national level, as here there are no borders with border points to control the movements of tourists. The experience of the EU countries, where statistical records of tourist arrivals are practically not kept, shows that information on accommodation

facilities is successfully used to collect statistical data. To implement this approach, it is necessary to carry out a number of activities:

- develop simplified forms for collecting information on the characteristics of accommodation facilities and their use by Kyrgyz and foreign visitors;
- ensure the completeness of information about all collective accommodation facilities in the form of an updated register of objects in the Osh Region;
- conduct a targeted information campaign to explain the significance of accommodation statistics;
- conduct monthly collection of completed forms in electronic form and ensure their rapid processing of data, preferably within 1 month;
- analyze the dynamics of indicators and compare them with indicators of previous years and average annual indicators;
- ensure that the main results of this accounting are widely disseminated in accommodation facilities, among companies and associations of the hotel and tourism industry, local administrations and other interested organizations.

2.4.4. Promoting the principles of green economy

The study of the main tourist destinations of the Osh Region has revealed a number of systemic problems that hinder the development of environmentally sustainable forms of tourism. In general, they can be divided into 3 blocks:

1. Unfavorable environmental situation with household waste and sewage;
2. Low level of environmental awareness and, as a result, interdepartmental cooperation on environmental protection;
3. Degradation of mountain ecosystems caused by global climate change.

At the same time, if the last “global” block of issues is in the field of view of international organizations and development institutions (a number of projects are being implemented in the Kyrgyz Republic through the FAO, the Green Climate Fund, etc.), then the first two categories are still given insufficient attention.

Meanwhile, the settlement or mitigation of these problems is largely of an applied nature and, as the world practice shows, can be successfully implemented through:

- a) regulation;
- b) measures of financial support for business (subsidizing, preferential taxation);
- c) increase in the general level of awareness of problems and ways to solve them.

Some of the specific activities include:

- The first step in solving environmental problems in destinations should be *the introduction of an environmental audit system and the development of schemes for long-term planning of territories*, taking into account their recreational capacity. This undertaking should be supported by the introduction of state/municipal regulation of separate waste collection, involving the removal of solid waste, and requirements for the disposal of organic waste on site through the installation of sewer systems (water treatment facilities, euroseptic tanks, eco-toilets).

The connection of Osh Region's destinations to the Waste Management Business Network "WasteNet.kg" (it already includes almost all HORECA organizations popular in the KR) can be an important aid in the implementation of recycling measures. For a small fee, employees of the Network, which has staff in all regions of the country, will advise businesses on how to organize a waste management system and technologies for reuse and recycling. In WasteNet.kg

one can get all necessary information about preferential bank financing programs for "green" initiatives, branding a business with eco-labels and other useful contacts.

- In turn, the solution of issues related to environmental consciousness can be helped by *an increase in the level of awareness of the population about environmental problems and a more active use of energy-saving and resource-efficient technologies by the tourism industry.*

Many tourist destinations in the Osh Region are located in mountainous areas, which have ample opportunities for the development of renewable energy sources. This primarily concerns a) *the use of the energy of small rivers* (the watercourses of the Karadarya river basin flow through the region), b) *the installation of solar panels to generate electricity*, and c) *solar collectors for hot water supply* (the region has an average of 250-270 sunny days per year).

Against this background, it seems surprising that many players of the tourism market are still poorly aware of the principles and practices of renewable energy. A survey of SMEs in the hotel and restaurant business of the Kyrgyz Republic, conducted in 2020 in the framework of the EU project "Improving Energy and Resource Efficiency in the Tourism Industry of Kyrgyzstan (PERETO)" showed that only about 30% of respondents have a general idea of the practices and principles of green economy. Moreover, this knowledge mainly relates to well-known technologies for the use of energy-saving lamps, solar water heaters and waste sorting. Strikingly, these figures are generally in line with consumer expectations. Only 35% of those surveyed by the PERETO responded that it is important for hotels and restaurants to be "green and take care of the environment".

In order to reverse this situation, the PERETO project proposes and implements a number of measures, which with the addition of the consultant can be defined as follows (see also Appendix 2d – the resolution of the joint round table of the PERETO and STDSP projects on the implementation of sustainable production and consumption in the tourism sector of the Osh Region):

- 1) *Promoting industry commitment* to promote "green" certification of tourism destinations;
- 2) *Development* of new, more flexible "green" *finance mechanisms* adapted to tourism industry players;
- 3) *Capacity building and technical readiness of the regional tourist destinations* to the introduction of energy and resource-saving technologies;
- 4) *Raising awareness of ordinary people*, officials and representatives of the tourism business about environmental issues and the opportunities of a green economy (including through regular trainings on the topics "Environmental situation in Kyrgyzstan and Central Asia", "Sustainable development and RES", etc.).

2.4.5. Measures for the sector's post-pandemic modernization

The last few years have been difficult for the global tourism industry. The COVID -19 pandemic has hit global chains hard and changed tourist flows. These trends have not bypassed the tourism sector of Kyrgyzstan, which in the pre-pandemic years created about 5% of GDP. With the onset of the epidemic, this figure dropped to 3.3% in 2020 and rose slightly to 3.6% a year later.

To support the tourism sector, the Kyrgyz Government adopted a number of economic measures, which mainly included the provision of tax deferrals and preferential loans for tourism business entities. An important institutional decision aimed at diversifying the capabilities of the industry was the creation of the Tourism Development Support Fund with a capital of 1 KGS bln. In addition, the national regulator of the tourism industry - the Department of Tourism under the MEC KR - developed and began to implement sectoral programs and projects to support certain

types of tourism, which in the future can make the industry more resilient in the face of crisis phenomena. Among them it should be noted:

- *Measures to support domestic tourism.* As elsewhere in the world, the COVID -19 pandemic has forced residents of large settlements to take a different look at the possibilities of domestic tourism. In the face of restrictions on international travel, many citizens began to spend their weekends and vacations in nearby areas, rural areas, or going on two-three-day family car tours around the republic. For example, residents of Osh began to visit en masse the nearby yurt camps in Alay and Nookat, Kara-Suu and Uzgen districts. In order to popularize this trend, immediately after the easing of quarantine restrictions in 2021, the Department of Tourism announced a competition for the title of an honorary tourist. To receive the coveted title, everyone was invited to visit 10 main attractions of the republic (including Sulaiman-Too and the Uzgen complex located in the region) and send photos from places to the Department's Facebook page.
- *Diversification of conditions for the development of winter tourism.* In order to mitigate the negative impact of the pandemic on the economic sustainability of winter tourism entities, an Action Plan for winter tourism development in the Kyrgyz Republic was elaborated. As part of the measures proposed in it, many entrepreneurs began to take loans for improving the infrastructure of destinations to receive tourists in the winter. So, for example, in the Sary-Oy gorge, in Alay district, winter houses in the Barn-house style, insulated for living in winter conditions, began to be built.
- *"Digital Nomads".* Another novelty designed to popularize year-round tourism in Kyrgyzstan was a pilot project supported by the Kyrgyz Government to grant foreign citizens the status of "Digital Nomad". The program allows for staying on the territory of the republic without visas, registration and other permits, as well as issuing a personal tax identifier to simplify interaction with local authorities. The program is ideal for IT professionals who can work remotely from anywhere in the world with an Internet connection.

It is important to continue the above measures in the future, adopting new approaches and technologies introduced around the world.

There is a consensus among travel industry experts that **technological innovation** will play a significant role in the development of the industry in the post-pandemic years. First of all, these technologies and know-how will be of increasing importance in terms of controlling health risks and ensuring the safety of tourists during travel.

The concept of social distance, which has become firmly established in our lives, implies *a non-contact mode of communication* with clients, when making restaurant reservations and in many other cases. Experts predict an increase in demand for *tourist events in the open air and in nature*. Many restaurants have already learned how to adapt both their facilities (installing outdoor patio seating, improving ventilation) and their methods of operation, such as *digitizing menus* or launching *new delivery services*. Innovation plays a key role in this process.

- ✓ Such technologies/approaches are gradually being introduced in Kyrgyzstan. For example, in the city of Karakol, Issyk-Kul province, there is a hotel " Matsunoki " with the only Japanese cuisine in the region. During COVID-19 special CCTV cameras were installed inside the restaurant. Through these cameras, the owner of the restaurant communicated remotely with visitors - guests received online information about where the food was, how it could be heated, and much more. Such an initiative was very liked by foreign tourists. Osh hotels and guest houses could also take advantage of this experience, having previously equipped their facilities with similar equipment.

The post-COVID-19 era opens up **new tourism opportunities for mountain areas**. As noted in paragraph 2.1, there is a growing trend to visit less crowded and remote places. In this regard, it seems important to focus on this direction. Fortunately, the Osh Region has all the possibilities for this. Another thing is that the mountainous areas of the region face the same problems on the path of development as the large cities. At the same time, in terms of infrastructure, they are even less developed, and their human resources is noticeably lower. Therefore, at the initial stage, for the development of mountain tourism, it is necessary to focus on an *accelerated transition to digital technologies*, which primarily means the transfer of all information of interest to tourists into electronic form with its placement on social media (see paragraph 3.4), as well as *raising the level of awareness of existing and future tourism business entities* about market trends and demand factors.

The challenge for operators in these destinations is how to translate demand patterns into tourism products and how to market them intelligently. The product development strategy will depend on the specifics of the resources available: if there is a strong attraction, a flagship product approach ("wow product") can be used. On the other hand, if it is not possible to single out "focuses of attraction" in a destination, one can choose a cluster product approach that combines a set of elements to create a product offer and convince a potential visitor to choose this particular destination. For this purpose, it may be useful to use festivals and other events that attract visitors (see paragraphs 3.2).

The most important element in the successful promotion of mountain tourism is *a wide collaboration* that involves attending educational events, consulting with other market participants and interacting with all stakeholders, including local communities, environmental and social institutions, and authorities.

2.4.6. Tourism growth points in Osh city

The undisputed center of the Osh Region, its pearl is Osh city - one of the most ancient and truly eastern cities of Kyrgyzstan. According to one of the expert assessments, Osh has *three locations* that convey its unique character, places where its peculiarity is most clearly manifested, and through which the tourist potential of the city can be revealed. In theory, they could be united into *the "Osh tourist ring"*, laying between them the routes for tourists. These locations are the area around the central bazaar, the area around Sulaiman-Too and the so-called Russian part of the city. All of them are located in the central part of the city.

* * *

The history of Osh is inextricably linked with its bazaars, which have always been more than just a territory of lively trade. They united peoples and cultures, traditions and customs, cuisines and habits. We are talking about **the central bazaar of Osh city**. Unfortunately, this part of the city's cultural heritage, its heart, is now losing its authenticity on several fronts at once.

Surprisingly, there is even a problem of etymology. All tourist guides and maps stubbornly continue to call the central bazaar "Zhaima-bazaar," which can be translated from Kyrgyz as "a scattered, spread-out market". The fact is that it has never been called that in history. This name appeared only in the 1990s to refer to the new bazaar rows on Kara-Suy Street, where the first shuttle traders began selling clothes. The phrase "Zhaima Bazaar" narrows the space of the market and levels its rich history. It is necessary to give it back its former name, calling it simply "bazaar" or "borborduk (central) bazaar".

The central bazaar consists of several parts. From the point of view of tourism development, its old quarters, which can be conditionally called the "old bazaar", are of great interest. To preserve this part of the market, it is necessary to visually distinguish it from the rest of the market, clean

and modernize the brick arch (it was built in the 1980s), which is almost invisible today. According to the elders, spices, dried fruits, nuts, herbs and oriental sweets were traded behind the arch for centuries. At present, there are only a few merchants left, huddled behind unsightly shops. While the old shopping malls are preserved, it is necessary to reconstruct them and introduce special protection of this territory. Even in Soviet times, the bazaar was somehow preserved in its historical form, having been transformed into a market. For its functioning, a complex system of public-private relations was invented so that merchants, artisans and blacksmiths continued to work. Today, from time to time, there are initiatives about the need to transfer the bazaar. The problem is created by container rows on the opposite side of the Ak-Buura River, where trade was not conducted before. Now the market has grown, in some places it is not a very presentable sight, there are cases of unsanitary conditions.

Another problem is the historical buildings of teahouses (chaikanas) on the banks of the Ak-Buura. Currently, they have been turned into sewing workshops and hairdressing salons. It makes sense to restore at least some of them for tourism purposes. The city of Osh is gradually losing its glorious teahouse culture. A lot has been written about it in guidebooks, but in fact there are almost no real chaikanas left in the city.

Traditionally, tourists are of great interest to blacksmith rows located along the bank of Ak-Buura. Without support and attention from the state, these keepers of the old bazaar's traditions are gradually disappearing. The same can be said about other artisans.

* * *

Due to its special location, Osh has for centuries remained the center of the spiritual culture for inhabitants of the Ferghana Valley. The center of attraction for pilgrims was **Sulaiman-Too**. At its foot, monuments of history and architecture, built in the period from the early Middle Ages to the twentieth century, have been preserved.

The absolute dominant of the area is the mountain itself. At present, the symbolic Gates of Fire and Water, built in the 2000s, are almost invisible because of the fences. The terraces of the ancient Osh settlement are not properly maintained. One of the visiting cards of the city, the museum located in cave grottoes, needs a comprehensive reconstruction and revision of its exposition with an emphasis on the history of the Osh settlement and Sulaiman-Too. Another attraction of the mountain - Babur's House is also in need of reconstruction. In addition to it, on the top of the mountain there are remains of other historical sites that are not mentioned anywhere. There is no proper work to preserve the unique rock paintings near the southern slope of the mountain. Most objects do not have information stands telling about their cultural and historical significance.

Among other objects of interest to tourists, it is worth noting the mausoleum of Asaf ibn Burkhiya, the mosques of Abdulla Khan II and Muhammad Yusup Baikhodzha oglu located in the immediate vicinity of Sulaiman-Too, the remains of a medieval bathhouse and the Street of Artisans.

The mausoleum is located on the southeastern slope of the mountain; it was built in the 18th century in the traditions of the Fergana architectural school. In historical chronicles it is mentioned as a mazar. The cult of mazars in Islam began to develop from the 10th century, and the Sufis played a special role in this. Mosques, madrasahs and caravanserais were often built around the mazars. The property needs a comprehensive renovation.

The remains of a medieval bath (X-XII centuries) at the northern foot of Sulaiman-Too were discovered in 1984 during construction work. The bath was located next to mosques and madrasahs, which were densely built up at the foot of the mountain. Not far from the bath, two canals flowed - Zhupas-Aryk and Zhannat-Aryk, the first of which has survived to this day.

The mosque of Abdullah Khan II is a historical and architectural monument of the 16th century, relating to the reign of the Sheibanid dynasty. It is located at the northern foot of the mountain and was supposedly built in 1580 at the height of the power of Abdullah Khan II, the ruler of a huge empire that stretched from Bukhara to Osh and from Khorezm to Khorasan. Mosques with the prefix “rabat” played the role of a kind of fortress on the borders of the Sheibanid state. Today, the Rabat Mosque of Abdullah Khan II is losing its unique architecture due to modern remodels. The object needs to be protected, studied and popularized.

Next to this mosque begins the old quarter of the "sheikhs", which is now called the Street of Artisans. The problem is that there are practically no artisans left there at present - only two families living in the quarter are related to handicrafts. Plans for the reconstruction and revitalization of the old quarter have been raised since the 1980s, but no significant progress has been observed in the reconstruction of the street. The restoration of workshops is beyond the power of most artisans and requires support from the state or the donor community.

The Mosque of Muhammad Yusup Baikhodzha oglu is an architectural monument of the 20th century. It is located at the end of the Street of Artisans, at the intersection with Navoi street. The mosque is an example of a “guzar” religious building, typical for the regions of the Ferghana Valley. It needs state protection.

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“Russian part” of Osh remains undiscovered and is not used. This is a square from the Osh Kyrgyz Drama Theater named after Ibraimov in the direction of the Russian Orthodox Church of Michael the Archangel and from the Ak-Buura River to the Osh fortress.

If historically Osh was formed as an eastern city with intricate streets, noisy bazaars, complexes of mosques and madrasahs, then since 1876, when the southern region of Kyrgyzstan became part of the Russian Empire, south of the “old city” (the area of the old bazaar) began to be built “new city” in the Russian/European architectural style.

In the 1880s a city park was laid out here, a church, a post office, a treasury, soldiers' barracks and an infirmary with a pharmacy were built. For decades, the park has been the center of cultural life of Osh province. In turn, the Osh fortress was built in 1919 on the site of the former military barracks in the very center of the "new city" at the intersection of Kurmanjan Datka and Lomonosov streets. The fortress was surrounded by adobe walls up to 3.5 meters high and 1.5 meters thick. The history of the formation of Soviet power in Osh province is connected with it.

In this part of the city, many old houses and buildings up to 150 years old have been preserved. Gradually, they are destroyed, multi-storey buildings are being built in their place, and the city is losing a significant part of its historical appearance.

2.4.7. Winter tourism as a factor in ensuring year-round tourism

A large part of the Osh Region is made up of high mountain ranges. Numerous mountain spurs, high alpine meadows and lakes provide excellent opportunities for the development of adventure tourism here.

In recent decades, the summer types (mountaineering, varieties of trekking and camping) of this direction of tourism have been actively developed in the Osh Region. The same, unfortunately, cannot be said about winter tourism, the promotion of which here, in contrast to the northern regions of Kyrgyzstan, is largely in its infancy and perceived rather as exotic. In fact, the only destination in the Osh region that provides tourist services in winter is the high mountain pass

Chyiyrchyk (2400 m) 40 km south of Osh. From December to February, a small ski base operates here, focused mainly on family vacations.

At the same time the territory of the region is literally surrounded by high mountain ranges, ideal for skiing. North-eastern edge of Osh province is located in branches of Tien Shan (the Fergana Ridge) while the southern and western edges are part of the Pamir-Alay system (Alay, Chong-Alay and Turkestan ranges).

At present, the "services" of these natural giants are used only by rare amateurs (usually heliski and skimo tours) who are ready for extreme living conditions or have the opportunity to quickly transport over long distances. These destinations are not designed for a stable reception of tourists - there are almost no guest houses for overnight stays and recreation near the ski trails.

According to experts who have studied local mountains for the development of winter tourism, there are several locations in the Osh Region suitable for *winter tourism development*.

- First of all, it is *the Pamir-Alay ski complex* planned for construction (for more details, see Appendix 3b). The base will be located on the northern slope of the Kara-Dobo mountain (on the Taldyk pass) at an altitude of 3,450 m above sea level. Geographically, it is located 172 km from Osh, not reaching 10 km to a closest village, at a distance of 300 m from the Osh-Erkeshtam highway (part of the Pamir Highway M41).

The area under the ski base (up to 1000 hectares) has slopes up to 4,000 m high (for the start) and the length of the tracks up to 2.0-3.0 km with slopes from 15 to 50 degrees and elevation differences up to 700 m. These parameters should suit tourists with a different degree of preparation. According to experts, there is a possibility to lay routes with a total length of 25-35 kilometers, which will make it the largest in Central Asia.

Snow cover stays here from mid-October to May. The peculiarities of the slopes do not imply any costs of relief profiling. In addition to the construction of ropeways, the ski base should include a year-round hotel complex, consisting of two domed structures (the first of which already operates as a hotel).

The skiing complex has good prospects for *year-round operation*, including the spring and autumn season: one or two-day excursions from Osh can be organized here - to the observation point, for equestrian tourism, trekking, paragliding, mountain biking.

Along with the mentioned ski resort, designed for the mass segment, the Osh Region also has *a number of destinations for ski tours* (ski touring, including climbing, usually on horses or yaks, and descending (freeride, backcountry)) and *winter trekking*.

As noted by experts of the tourism sector, these types of winter tourism are a priority for promotion in the region, given the growing environmental awareness and fragility of ecosystems of high mountainous areas. The organization of the same ski tours does not require large expenditures for the purchase of specialized equipment and the construction of capital structures, a small investment is enough for the purchase of ski equipment and the organization of small guest houses for catering and recreation of tourists.

In theory, all the mountain slopes of the region, located at an altitude above 3,000 m, retain snow cover for up to 7-8 months. Based on the results of expert surveys conducted in 2019, the following main locations were recommended for the development of ski tours:

- *Separate slopes on the territory of the Kyrgyz-Ata National Park*. The park is located 40 km from Osh in Nookat district and is spread on the northern slopes of the Alay Range, at an altitude of 2,000-2,400 m. The starting point for organizing tours can be the village of Kara-Koyu.

- *The northern slopes of the Chong-Alay Range* (in particular, the town of Kalta-Tora and the village of Achyk-Suu). The slopes for a ski tour have heights up to 3,800 m. The best time for freeride is from November to March. The mentioned slopes can be reached in 1-1.5 hours by car from Sary-Mogol village, which has guest houses specializing in receiving foreign tourists (included in the system of community-based tourism (CBT) Kyrgyzstan).

2.4.8. Development of geoparks

One of the global trends in tourism, which is increasingly understood as the development of its sustainable forms, is the promotion of the concept of geological tourism. The movement to create geoparks - special territories that demonstrate the geological history of the Earth - was born in the 1990s. This work reached a new stage in 2015, when the formation of the UNESCO Global Geoparks system began.

What makes UNESCO Global Geoparks particularly appealing is that, in addition to protecting geological heritage, geoparks promote sustainable development through responsible tourism and support for local communities. This, in turn, unlocks the economic potential of these areas and promotes the creation of innovative enterprises and new jobs around them. An analysis of the development of such parks in Europe and Southeast Asia shows that, with the right focus and business models, geoparks are new points of economic growth and human well-being, while preserving and enhancing the natural and cultural heritage of these areas.

In recent years, the idea of connecting Kyrgyzstan to the global movement of geoparks has gained momentum. In the south of Kyrgyzstan, the process was initiated by Batken province, where the Madygen Geopark was established. The park is currently in the process of gaining the status of a UNESCO Global Geopark.

In recent years, the idea of connecting Kyrgyzstan, a country with a rich geological diversity, to the global geoparks movement has received active support from both public figures and government agencies. In the south of Kyrgyzstan, the process was initiated by Batken province, where the Madygen Geopark was established. The park is currently in the process of gaining the status of a UNESCO Global Geopark.

According to geologists and international consultants cooperating with UNESCO, Osh province also possesses considerable geodiversity resources well suited to *create at least one geopark*.

At the initiative of tourism associations in the region (Destination Osh, Silk Road Tour Operators Association) and with the support of the Department of Tourism in 2022, large-scale work has begun to create a geopark in the Osh Region, which in the future may receive global status. The process of acquiring the cherished status is a multi-stage undertaking, involving the mobilization and broad cooperation of community members, business, local population and administrative bodies. Applicants for the UNESCO Global Geopark status must meet four criteria, namely: a) have geological heritage of international importance; b) ensure active participation of local communities in the park management; c) develop a long-term comprehensive plan for sustainable development of the park territory; d) establish international cooperation for exchange of experience and best practices.

The first steps in this direction have already been taken.

- In October 2022 in Osh the International Forum entitled "3 GEO - geoheritage, geotourism and geo-cooperation to create UNESCO Geoparks" was held with the participation of scientists and tourism industry representatives from Central Asia, Europe, Russia and China, as well as international consultants on geoparks development issues;

- In December 2022 the PRP KR in Osh Province adopted a resolution to create the Osh Geopark (the name of the park has not yet been determined). According to it, within 2023 it is necessary to make an inventory of geological objects in the region, to prepare a strategy and a roadmap for the development of the geopark, and to create its directorate. Besides, a large number of scientific, practical and marketing activities are planned, aimed at promoting the concept of the Osh Geopark at all levels;
- In March 2023, Osh tour operators visited an international tourism exhibition ITB Berlin where they presented the concept of the Osh Geopark and reached an agreement on cooperation with the German-Polish UNESCO Muskauer Faltenbogen Geopark and the Reis Geopark.

As a result of initial expert evaluations, it is proposed to identify a territory at the junction of Nookat, Kara-Suu, Alay and Chong-Alay districts of Osh Province for the Osh Geopark. Geographically this territory belongs to the place of joining of South Tien-Shan and Pamir-Alay mountain systems. During an international archaeological expedition in 2018, several thousand stone tools and jewelry were found here. The oldest cultural layer containing artifacts is about 23 thousand years old. The age of the mountain deposits themselves belongs to the Paleozoic geological era.

2.4.9. Establishment of tourist service centers

Tourist service (information) centers is a service that provides information on local tourist products, attractions, sightseeing and transport routes. They can also sell tickets for local public transport, sell or give away for free tourist materials, for example, maps, booklets, local history and historical literature, etc., as well as trade with souvenirs, products of local artisans, craftsmen and artists. In addition, they can assist state authorities in the formation and use of information resources about tourism.

In Kyrgyzstan, the TACIS project "Issyk-Kul Regional Development" promoted the concept of tourist service centers in 2000. Under the project, three centers were opened in Issyk-Kul province: one in the building of Issyk-Kul State University, the second in the Tong district, and the other one at an ecological post at the entrance to Balykchy city.

However, after the completion of the above-mentioned project, the center in Balykchy was closed. Over time, the center in the Tong district was closed as well. Currently, only the center at the university (Karakol city) is functioning. The reason for their closure was insufficiently effective management. As it seems to the consultants, in order to continue the work of tourist service centers, they should have been timely transferred to professional organizations engaged in tourism activities.

At present there is only one tourist center in Osh, managed by Destination Osh. The organization managed another one, stylized in the form of a traditional Kyrgyz yurt, which was located near the historical museum of Sulaiman-Too. However, in the absence of heating it could only function during the spring and summer period. Over time, due to difficulties with service, the center was closed.

TDSF KR previously said that it plans to build 68 rest points, a kind of prototypes of these centers. All rest points will have showers and toilets, including one specially equipped for PWD, a namazkana, a small coffee shop, a kiosk and charging points for electric cars. Rest points can work all year round. For heating and hot water supply, solar collectors will be installed in them, and in places where there are no sewerage systems, autonomous treatment facilities will be built.

According to TDSF KR, the organization is working on the possibility of building 11 rest points

in the Osh Region on the following locations:

No.	Administrative-territorial unit of the Osh Region	Rest point locations
1.	Osh city	area near the international airport
2.		in the parking lot of the Sulaiman-Too Museum
3.		area near the Osh Mayor's Office
4.		in the Alisher Navoi city park
5.	Kara-Suu district	checkpoint "Dostuk", on the border with Uzbekistan, near Osh
6.	Uzgen district	near the Uzgen complex (Uzgen city)
7.	Alay district	in Gulcha village
8.		Uch-Dobo village, on the territory of the National Forest Fund
9.		checkpoint "Erkeshtam"(border with China)
10.		checkpoint "Bor-Dobo" (the Kyzyl-Art pass, border with Tajikistan from the south)
11.	Nookat district	Bel-Oruk ayil aimak, on the highway to Batken province

After the construction is completed, they are planned to be handed over to Global Operating. This company has already serviced Gazprom's gas stations, equipping them with coffee shops and stores where one can buy basic necessities. Many motorists prefer to fill up at these gas stations precisely because of these coffee shops.

On the other hand, the ARIS "Regional Economic Development" project considers the possibility of prioritizing the construction of 3 tourist service centers in the Osh Region. It is about the following sites: 1) in the intersection on the Osh-Batken highway to the Kyrgyz-Ata National Park (Zulpuev ayil aimak, Nookat district), 2) on the Chiyirchyk pass (Kara-Suu district), 3) on the highway Osh-Erkeshtam at Sary-Tash village (Alay district).

The centers proposed for construction within the framework of the ARIS project could apply the experience of such centers in Japan, namely: rent out traditional national clothes, sell tickets for air, rail and road transport, take luggage for storage, provide services to local translators and guides.

The tourist center managed by Destination Osh (it is located in the building of the Osh Mayor's Office) uses similar practices to maintain financial stability, namely it organizes tours in the Osh Region, rents bicycles and mountain equipment (tents, special clothing and climbing tools) to tourists.

CHAPTER 3. PACKAGE OF MEASURES FOR THE SECTOR'S SUSTAINABLE DEVELOPMENT

3.1. Priority Investment Program

As noted above, in order to examine the specifics of the Osh Region's tourist destinations, it was decided to focus on 14 pilot destinations. The analysis of these destinations, in addition to structural challenges related to human resources, rule-making, institutions, marketing, etc., also revealed common infrastructural and near-infrastructural problems for many of them, namely:

- Lack of a concept and holistic development of destination territories and, accordingly, low attractiveness among foreign tourists;
- Many locations have chaotic trade, which spoils their overall appearance and prevents the rational and efficient use of the areas;
- Lack of sewage system, quality toilets and washstands;
- Lack of clear and understandable navigation for motorists and pedestrians;
- A lot of visual garbage, lack of trash cans and urns, and lack of systematic collection and removal of solid waste;
- Chaotic buildings, there is no single architectural style, which often spoils the natural and architectural ensemble of the object.

According to the consultant, a number of infrastructural improvements are required to rationalize the use of these destinations, to make them attractive to tourists and commercially sustainable base for further functioning. In this regard, in agreement with the Coordination Working Group established under the project (the composition of the group is presented in Appendix 1d), as well as the results of focus group discussions with tour operators in the Osh Region 12 sites were selected for inclusion in the STDSP Priority Investment Program (see Information on Investment Projects, Appendix 3b).

At the same time, the institutional improvement of the regional tourism sector needs to implement at least 3 investment projects (so-called "soft" investments) aimed at updating the legislation of the Kyrgyz Republic in accordance with current global standards and national needs of the tourism industry, as well as extensive educational activities among the main actors (management and employees of the tourism industry, regional officials) of the tourism industry.

Based on the analysis of the problems at these locations, initial types and amounts of work and measures to improve the functioning of these sites were identified. The preliminary volume of investment needs for the implementation of these works and measures (projects) is estimated at 277.3 KGS mln, including 224 KGS mln (53.5 mln - own funds) for "hard" investment projects and 53.3 KGS mln - for "soft" investment projects. In addition, in a preliminary manner the proposed sources of funding for these projects were identified (see paragraph 3.1.3)

3.1.1. "Bank of investment projects"

	Project name	Short description	Implementation timeline	Project initiator/ developer	Location, geographic scope	Compliance with the STDSP and regional strategies and programs
I	"Hard" investment projects					
1.	Construction of the Pamir-Alay ski resort	<p>The territory for the ski resort (up to 1,000 ha) is located on the northern slope of the Kara-Dobo mountain at an altitude of 3,450 m above sea level, 172 km from Osh, on the Taldyk pass). The territory has slopes with a height of 3,400 to 4,000 m and a length of trails up to 2.5-3 km. As part of the project, it is planned:</p> <ul style="list-style-type: none"> • Completion of the construction of a year-round hotel (3 stars); • Construction of 2 drag lifts (first stage); • Organization of a snow-tubing track (rolling on cheesecakes); • Purchase of special equipment (snowcat, snowmobiles); • Acquisition of an automatic weather station and equipment of a meteorological site; • Organization of avalanche safety; • Organization of a fast-food cafe for "weekend vacation" arrivals. • Acquisition of ski and tubing sets for the provision of rental services. 	<p>Short term project up to 3 years.</p> <p>The project will be implemented within 24 months (summer-autumn 2025).</p>	Akmatov Abdirasul Zhamshitovich	Alay district	<p>This project belongs to Clusters No. 3 and No. 4 "ETNOTOURISM IN ALAY". AND "PAMIRO-ALAY MOUNTAINS".</p> <p>Its implementation will contribute to the development of mountain tourism infrastructure in Alay and Chong-Alay districts of Osh province.</p> <p>About a hundred new jobs will be created for young people, women, rural workers, the creative intelligentsia of the region, and the general level of well-being of local residents will increase.</p> <p>The project correlates with the goals of the 2021-2026 Strategy for the socio-economic development of Osh province.</p>
2.	Revival of the old technology of rice processing in a rice mill (akzhuvaz)	<p>This object is located in the southern suburbs of Uzgen city.</p> <p>Homemade rice maker, made of metal-wood construction, works on the basis of a water mill. The whole rice husking</p>	Short-term project up to 3 years	Kimsanov Azizbek Usmanzhanovich	Uzgen district, Rybkhoz village	<p>This project belongs to Cluster No.1 "SILK ROAD CITIES".</p> <p>The project is also in line with the Green Economy Development</p>

		<p>system is an ancient rice processing technology.</p> <p>Rice fields are located next to it, where the traditional Uzgen variety of rice “devzira” is grown. In addition, the city itself is rich in teahouses and ashkhanas, where the so-called Uzgen pilaf from the mentioned rice.</p> <p>The project will be aimed at the renovation of the facility and the comprehensive improvement of the surrounding area.</p>				<p>Program in the Kyrgyz Republic for 2019-2023, which provides for:</p> <ul style="list-style-type: none"> - increasing the provision of the population with environmentally friendly food through sustainable resource management and the development of resource-saving, organic and climate-sustainable agriculture; -creation of basic tools to stimulate the transition to sustainable tourism to improve the living standards of the local population.
3.	Reconstruction of the terrain around the Abshyr-Ata waterfall	<p>The Abshyr-Ata waterfall is located in the valley of the same name, 75 km from Osh. The waterfall is considered a unique hydrogeological feature, famous for its 15-meter-tall waterfall, which flows in a turbulent stream from a small karst cave located right in the rock.</p> <p>The project will be aimed at comprehensive improvement of the destination.</p>	The project will be implemented within 6 months.	Imaraliev Adilbek Toktosunovich	Nookat district, Abshyr-Sai village	This project belongs to Cluster No. 4 "SACRED PLACES OF OSH PROVINCE". Its implementation will contribute to the development of the infrastructure of Nookat district and help improve the living standards of the population by attracting more local residents to the tourism industry.
4.	Reconstruction of the historical area "Duldul- At"	<p>The village of Aravan, which is located 21 km from Osh, is known for its ancient rock paintings depicting the famous "heavenly horses" of the Davan kingdom. Currently, this area has a reputation as a sacred complex, which includes, in addition to rock paintings, a mosque, graves, a stream, a stone of sacrifice, etc.</p> <p>The project will be aimed at comprehensive improvement of the destination.</p>	Medium-term project for a period of 3 to 5 years	Matkarimov Nurbek Tolonbekovich, Obdunov Omurzak Abdilamitovich	Aravan district, Aravan village	This project belongs to Cluster No. 4 "SACRED PLACES OF OSH PROVINCE". Its implementation will contribute to the development of the tourist infrastructure of Aravan district and contribute to improving the living standards of the population by attracting more local residents to the tourism industry.

5.	Revival of the Street of artisans	<p>The city of Osh is known for its ancient streets (mahallas) around Sulaiman-Too, a UNESCO World Heritage Site. Among them the so-called Street of artisans.</p> <p>The project will be aimed at comprehensive improvement of the destination, namely, giving the architecture of houses a historical "Turkestan" look, laying paving stones, opening craft workshops, restoring old water intake devices - charpalaks</p>	Long-term project over 5 years	Batirov Ravshanbek Batirovich	Osh city, Kolonorcutor street	<p>This project belongs to Cluster No. 1 "SILK ROAD CITIES".</p> <p>Its implementation correlates with the goals set in the Socio-Economic Development Program of Osh for 2022-2025 "Kelecheckke tatyktuu shaar".</p>
6.	Organization of activities of the recreation center "Kozhoke" in Nookat district	<p>This project involves the construction of a universal recreation center for adults and children.</p> <p>The project provides for the creation of the infrastructure of the recreation center, with a set of qualified personnel and a total capacity of up to 40 people.</p> <p>The infrastructure of the recreation center will include a dining room, a swimming pool, a gym, a dance floor, a playground for children's recreation.</p>	1 year to launch the project	Mamazhunosova Gulmira Aranovna	Nookat district, Kojoke village	<p>The implementation of this project will allow the development of the infrastructure of the Isanov aiyl aimak. The project correlates with the 2021-2026 Strategy for the socio-economic development of Osh province and belongs to Clusters No.4 "SACRED PLACES OF OSH PROVINCE".</p>
7.	Organization of the recreation area "Kut-Ordo" in the mountainous area of Sary-Oy	<p>The project is the organization of a tourist package in a specified area. This requires a comprehensive improvement of the destination, including the paving of trails, the installation of 3 yurts and the organization of basic conditions for koumiss treatment and the production of local fermented milk products (koumiss, kurut, cottage cheese, sour cream, etc.).</p>	Medium-term project for a period of 3 to 5 years	Sayitkulova Kanyshay Zhalalidinovna	Alay district, Sary-Oy area	<p>This project belongs to the Cluster No.4 "ETNOTOURISM IN ALAY".</p> <p>Its implementation will contribute to the development of the mountain tourism infrastructure of Alay district, in particular, jailoo tourism with the offer of koumiss treatment, equestrian tourism, and national gastronomic tours. The project correlates with the goals of the 2021-2026 Strategy for the</p>

						socio-economic development of Osh province
8.	Development of eco- and ethno-tourism in the highland zone of Sary-Mogol	Sary-Mogol is a mountainous village in the Alay valley. The picturesque mountain lake Tulpar-Kul is located 25 km away, and the base camp of Peak Lenina is 27 km away. There is an ethnographic museum in the village, old dwelling houses with clay coverings (without a roof) have been preserved. The village has great potential for the development of ethnographic tourism. The project will be aimed at expanding the tourist infrastructure of Sary-Mogol with the strengthening of its ethnic component.	Long-term project over 5 years	Tashbekov Abdilla Umarovich	Alay district, Sary-Mogol village	This project belongs to Cluster No. 2 "PAMIR-ALAY MOUNTAINS". Its implementation will contribute to the integrated development of the high mountain village and the promotion of community-based tourism. The project correlates with the goals of the 2021-2026 Strategy for the socio-economic development of Osh province.
9.	Development of historical and ecological tourism in the Alay Valley	The village of Doroot-Korgon is located in the high mountainous Alay valley and is known for the historical fortress "Kul-Datka" from the times of the Kokand Khanate . The project will be aimed at expanding the tourist infrastructure of Daroot-Korgon with the strengthening of its historical and cultural component.	Long-term project over 5 years	Nyshanova Kaiyrma Kydyrshaevna	Chong-Alay district, Doroot-Korgon village	This project belongs to Clusters No. 2 "PAMIRO-ALAY MOUNTAINS". The project implementation will give impetus to the integrated development of the entire Chong-Alay district. The project correlates with the 2021-2026 Strategy for the socio-economic development of Osh province.
10.	Development of geotourism in the Kojo-Kelen area in Kara-Suu district	Tourist area Kojo-Kelen is located in the mountainous zone - in the southern part of Kara-Suu district. Through the Jyptyk pass from Kojo-Kelen one can get to the Alay valley. The project is the organization of a tourist package with an emphasis on eco- and geotourism in the specified area. This requires the construction of a	Medium-term project for a period of 3 to 5 years	Aidarov Mamatzhakyp Koibagarovich	Kara-Suu district, Kojo-Kelen area	This project belongs to Clusters No. 2 "PAMIRO-ALAY MOUNTAINS". The project will allow solving a number of socio-economic problems in the mountainous zones of Kara-Suu district and contribute to the improvement of local

		yurt camp that provides a wide range of tourist services, from organizing horse riding tours to koumiss treatment.				infrastructure and the living standards of the local population.
11.	Development of museums and preservation of the historical and cultural heritage of Osh (Improvement of the Sulaiman-Too territory)	Sulaiman-Too has been a geological reserve since 1975. The mountain is formed of limestone, therefore it is distinguished by many caves and grottoes. There are rock paintings of historical and archaeological significance. The objects of the mountain are of interest from the point of view of pilgrimage and recreation. The project will be aimed at comprehensive improvement and improvement of the infrastructure of the destination.	Long-term project over 5 years	Ibaidullaev Khairullo	Osh city, 26, Gapar Aitiev street	This project belongs to Cluster No. 1 "SILK ROAD CITIES". Its implementation correlates with the goals set in the Socio-Economic Development Program of the city of Osh for 2022-2025. "Kelechekke tatyktuu shaar" and the 2021-2026 Strategy for the socio-economic development of Osh province
12.	Development of museum business and preservation of the historical and cultural heritage of Uzgen (Improvement of the territory of the Uzgen complex)	The Uzgen mausoleums of the Karakhanid era are an architectural monument of the Turkic dynasty of the Karakhanids, the construction time of which dates back to the 11 th -12 th centuries. The complex includes three tombs and a minaret. The project will be aimed at comprehensive improvement and improvement of the infrastructure of the destination.	Long-term project over 5 years	Abdyrakmanov Sultanbek Arstanbekovich	Uzgen city, 126, Lenin street	This project belongs to Cluster No. 1 "SILK ROAD CITIES". Its implementation will preserve the historical and cultural heritage of Uzgen and create more comfortable conditions for attracting tourists.
II "Soft" investment projects						
1.	Review and improvement of the national legislation in the field of tourism development (the STDSP legislative project)	The project will be aimed at a detailed review and analysis of the legislation in the field of tourism development, as well as the development and introduction of the required changes and additions to the legal acts (amendments are required to the following legal acts: "Tax Code",	Short-term project for a period of 1 year	This project can be implemented through the involvement of a consulting company or a group of experts,	Bishkek	In the 2023-2028 General Action Plan for the STDSP implementation (see Paragraph 3.5.) a number of problems related to the legislation have been identified.

		<i>“Land Code”, laws “On Tourism”, “On Pastures”, “On Renewable Energy Sources”, “On the Creative Industries Park”, by-laws, legal acts of LSG bodies, etc.)</i>		within the framework of “State Investment Program (SIP)” or by other international organizations		
2.	Development of professional and personnel potential of the tourism industry of the Osh Region/Republic (the STDSP educational project)	The project will be aimed at developing and implementing various educational programs aimed at improving the skills and obtaining basic knowledge of employees of tourist destinations, civil servants of the Osh Region on such topics as “Tourism as a locomotive of the economy”, “Fundamentals of a green economy and sustainable development in tourism”, “Corporate ethics and culture of service”, “Sustainable and inclusive environment”, “Digital management and SMM services”, etc.	Long-term project for a period of 4 years	This project can be implemented through the involvement of a consulting company or a group of experts, within the framework of SIP or by other international organizations	Bishkek / Osh	In almost every block of the 2023-2028 General Action Plan for the STDSP implementation activities related to the conduct of relevant educational activities are proposed.
3.	Building the capacity of museums in the Osh Region (the STDSP museum project)	The project will be aimed at modernizing the methods of work of museums in the Osh Region with visitors and will consist of three components: <ul style="list-style-type: none"> ○ Component "Development of human capital" (training of employees). ○ Component "Expansion of social capital" (networking); ○ Component "Development of an interactive approach". (inclusion of interactive working methods). 	Long-term project for a period of 4 years	This project can be implemented through the involvement of a consulting company or a group of experts, within the framework of SIP or by other international organizations	Osh	In the Human Resources and FINANCE blocks of the 2023-2028 General Action Plan for the STDSP implementation the main problems of museums in the Osh Region are identified.

3.1.2. Ranking of "hard" investment projects

Priority investment projects were ranked in accordance with the Methodology for prioritizing investments projects (see Appendix 3a).

Project name	Efficiency (profitability) of the project		Contribution to the economic development of the region		Compliance with the goals and objectives of the STDSP		Performance and continued sustainability		Final grade	
	40%		thirty%		15%		15%		Total score	Place
	Rating (%)	Score	Rating (%)	Score	Rating (%)	Score	Rating (%)	Score		
Construction of the Pamir-Alay ski resort	95	38	95	29	95	14	95	14.25	95.25	1
Reconstruction of the terrain around the Abshyr-Ata waterfall	80	32	90	27	90	13.5	85	12.75	85.3	7
Revival of the old technology of rice processing in a rice mill (akzhuvaz)	90	36	90	27	95	14.25	90	13.5	90.8	3
Revival of the Street of artisans	80	32	95	29	95	14	95	14.25	89.0	5
Organization of activities of the recreation center "Kozhoke" in Nookat district	85	34	80	24	75	11.25	80	12	81.3	11
Reconstruction of the historical area "Duldul-At"	80	32	85	25.5	90	13.5	85	12.75	83.8	8
Organization of the recreation area "Kut-Ordo" in the mountainous area of Sary-Oy	85	34	80	24	85	12.8	75	11.3	82.0	10
Development of eco- and ethno-tourism in the highland zone of Sary-Mogol	90	36	85	25.5	90	13.5	80	12	87.0	6
Development of historical and ecological tourism in the Alay Valley	80	32	85	25.5	90	13.5	85	12.75	83.8	8
Development of geotourism in the Kojo-Kelen area in Kara-Suu district	80	32	80	24	90	13.5	85	12.75	82.3	9
Development of museums and preservation of the historical and cultural heritage of Osh	90	36	95	29	90	13.5	95	14.25	92.75	2
Development of museum business and preservation of the historical and cultural heritage of Uzgen	85	34	95	29	90	13.5	95	14.25	90.75	4

3.1.3. Preliminary project budgets

No.	Project name	Total investment amount, KGS (or USD)	Applicant's own contribution	Requested funding amount	Efficiency (profitability) of the project	Source of financing ²²
I	“Hard” investment projects					
1.	Construction of the Pamir-Alay ski resort	68 KGS mln	50 KGS mln	18 KGS mln	30%	Kyrgyz-Russian Development Fund, Kyrgyz-Uzbek Development Fund, SGP of the ARIS project "Regional Economic Development"
2.	Revival of the old technology of rice processing in a rice mill (akzhuvaz)	0.7 KGS mln	0.1 KGS mln	0.6 KGS mln	20%	Kyrgyz-Russian Development Fund, Kyrgyz-Uzbek Development Fund, SGP of the ARIS project "Regional Economic Development", Private investment (PPP project)
3.	Reconstruction of the terrain around the Abshyr-Ata waterfall	4.5 KGS mln	0.5 KGS mln	4.0 KGS mln	15%	Kyrgyz-Uzbek Development Fund, Private investment (PPP project)
4.	Reconstruction of the historical area "Duldul-At"	3.5 KGS mln	0.3 KGS mln	3.2 KGS mln	15%	Kyrgyz-Uzbek Development Fund, SGP of the ARIS project "Regional Economic Development", private investments (PPP project)
5.	Revival of the Street of artisans	104.4 KGS mln	0.4 KGS mln	104 KGS mln	15-17%	Private investment, DosCredoBank, Aiyl Bank, RSK Bank Kyrgyz-Uzbek Development Fund,
6.	Organization of activities of the recreation center "Kozhoke" in the Nookat region	6.6 KGS mln	0.6 KGS mln	6.0 KGS mln	15%	Private investment (PPP project), DosCredoBank, Aiyl bank, RSK bank, SGP of the ARIS project “Regional Economic Development”
7.	Organization of the recreation area "Kut-Ordo" in the mountainous area of Sary-Oy	1.1 KGS mln	0.1 KGS mln	1.0 KGS mln	20%	Private Investments (PPP Project), DosCredoBank, Aiyl Bank, RSK Bank, SGP of the ARIS project "Regional Economic Development"
8.	Development of eco- and ethno-tourism in the highland zone of Sary-Mogol	3.4 KGS mln _	0.4 KGS mln	3.0 KGS mln	25-30%	Kyrgyz-Russian Development Fund, Kyrgyz-Uzbek Development Fund,

²²All these funds and projects finance the tourism industry. These banks issue preferential loans for tourism and green technologies.

						Private Investments (PPP Project), DosCredoBank, Aiyl Bank, RSK Bank SGP of the ARIS project "Regional Economic Development"
9.	Development of historical and ecological tourism in the Alay Valley	2.4 KGS mln	0.4 KGS mln	2.0 KGS mln	15-20%	Kyrgyz-Russian Development Fund, Kyrgyz-Uzbek Development Fund, DosCredoBank, Aiyl Bank, RSK Bank, SGP of the ARIS project "Regional Economic Development"
10.	Development of geotourism in the Kojokelen area in Kara-Suu district	1.4 KGS mln _	0.3 KGS mln	1.1 KGS mln	15%	SGP of the ARIS project "Regional Economic Development", Private investment (PPP project)
11.	Development of museums and preservation of the historical and cultural heritage of Osh	12.2 KGS mln	0.2 KGS mln	12 KGS mln	15-17%	SGP of the ARIS project "Regional Economic Development", Private investment (PPP project)
12.	Development of museum business and preservation of the historical and cultural heritage of Uzgen	15.8 KGS mln	0.2 KGS mln	15.6 KGS mln	15%	SGP of the ARIS project "Regional Economic Development" Private investment (PPP project)
	TOTAL:	224 KGS mln	53.5 KGS mln	170.5 KGS mln		
II.	Soft investment projects					
1.	Review and improvement of the national legislation in the field of tourism development (the STDSP legislative project)	4.3 KGS mln		4.3 KGS mln		International financial institutions (ADB, WB, EBRD, etc.)
2.	Development of professional and personnel potential of the tourism industry of the Osh Region/Republic (the STDSP educational project)	25.8 KGS mln		25.8 KGS mln		International financial institutions (ADB, WB, EBRD, etc.)
3.	Building the capacity of museums in the Osh Region (the STDSP museum project)	23.2 KGS mln		23.2 KGS mln		International financial institutions (ADB, WB, EBRD, etc.)
	TOTAL:	53.3 KGS mln		53.3 KGS mln		
	TOTAL FOR ALL PROJECTS:	277.3 KGS mln	53.5 KGS mln	223.8 KGS mln		

3.2. Marketing strategy for the Osh Region's tourism sector

Strategically, **the key goal** of the new marketing policy of the Osh Region is to form a self-sufficient tourist destination based on the region's opportunities, occupying a stable niche in the system of global and regional (Central Asian and national) tourist flows through the creation of a competitive tourism image and products of the Osh Region.

To achieve this goal requires:

- Identification of potential target markets and the average tourist willing to come to the region;
- Development of a bright branding platform for positioning the Osh Region;
- Step-by-step programming of the main marketing activities necessary to promote the region (see paragraph 3.2.3);
- Identification of the main communication channels for conducting information campaigns;
- Determining measures for institutional support of the new marketing policy.

3.2.1. Outlines of the new marketing policy

Chapter 1 described in detail the features of the regional tourism potential and identified *key areas for the sector development*, which have a comparative advantage in attracting domestic and international tourists. In Chapter 2, the project consultants proposed a conceptual development model, abbreviated as SMG, reflecting the synergy of the heritage of the Silk Road, the opportunities of the alpine landscape (Mountains) and the diversity of gastronomy of the East (Gastronomy).

According to the consultant, the proposed model of positioning correlates well with global trends in tourism development. As noted in Chapter 2 (paragraph 2.1.), the focus of travelers' interests changes as the general level of education of people increases. Tourists are looking for unique experiences, more and more oriented to interaction with local people in order to learn something new, to immerse themselves in other cultures, customs and cuisine. Along with this, trends toward *personalization, immersiveness, interactivity, participativity, and the broad digitalization of the travel industry* are coming to the fore. In consultant's opinion, the Osh Region has good potential to be at the forefront of these global trends. For better understanding of the ongoing processes in tourism industry, let's dwell on certain types of tourism and correlate them with opportunities of the Osh Region.

The attitude to *adventure tourism* has changed noticeably in the last decade. Now it is not always mountaineering and extreme adventures, but rather "lighter" forms of traveling – trail tourism (hiking, trekking, bicycle tours, etc.), which also involves the study of local flora and fauna, acquaintance and communication with local residents, their culture and life. The Osh Region with its Alay and Trans-Alay Ranges, numerous gorges and valleys provides good opportunities for the development of this type of tourism. There are many well-known and unmarked trails in the region that can be used for hiking, horse riding, cycling and walking. Many of these tours also include yurt lodging, interaction with locals, and tasting traditional food and delicacies

It is difficult to overestimate the importance of food, especially when it comes to outdoor activities. And here we are talking not only about convenient and original city restaurants, but also about the organization of appropriate food in rural and remote areas. Against this background, *gastronomic tourism* is becoming increasingly popular, which is based on acquaintance with local traditions, culture and life of the inhabitants through their cuisine. Of particular interest to tourists are new recipes, rare ingredients, interactive (i.e., culinary master classes) and the joint preparation of local dishes. The Osh Region is rightfully considered the "gastronomic mecca" of Kyrgyzstan. The diversity of the peoples living here, their life philosophies have formed here a rich culinary

tradition, which not only other regions of the Kyrgyz Republic, but also the closest competitors in the Central Asian region cannot boast of.

Educational tourism. As mentioned above, one of the main trends in the development of tourism is interactivity and immersiveness. Travelers increasingly want not just to watch shows and performances, but to participate in them and do something interactive. Whether it is traditional music, horseback riding or learning about crafts, it is important to involve travelers in the process and allow them "try it for themselves," especially since this provides a great opportunity to feel belonging to the world of the Silk Road and the East.

Tourism in search of authenticity. Among the mass trends enumerated in the Situational Analysis was also recreational tourism, which refers to the travel focused on personal growth, psychological transformation of people. All kinds of volunteer trips, trips that allow people to reconsider their diet, engage in new sports, etc. are growing in popularity. In search of these forms of tourism, travelers are looking for authentic experiences that allow them to abstract away from life in the big city, the daily routine. The places of interest are those that seem unexplored, exotic, where there are no crowds of tourists with cameras, where one can feel harmony with nature. In our opinion, the Osh Region, both in the historical cities and mountainous areas, has opportunities to meet the needs of such travelers.

- At the same time, it is important to note that an international tourist, if he or she is not a professional ethnographer, expects to receive at least *a minimum set of services, comfort*, such as electricity, the Internet, warm toilet, hot water and quality food during these trips. The solution to these issues depends on the financial and infrastructural capabilities, as well as the level of professionalism of the host party.
- Another group of issues, directly related to marketing promotion, is that it is also important for the international tourist to feel some *statefulness and compositionality* of the tourist product. In our opinion, the branding of the tourist product, its semantic, event contenting can be very useful in this.

* * *

In view of the above, it is possible to determine **the target markets for attracting foreign tourists**. The analysis of the region's tourism potential given in Chapter 1 showed that most of the tourists arriving in the region (60-70%) are citizens of developed countries in Europe and America, as well as countries of the Far East. As a rule, such travelers buy package tours that involve visiting locations on the Pamir Highway – mountain ranges and high mountain lakes – with a one-day transit stop in Osh city. Many of them go to do trekking and hiking, someone wants to see the beauty of the Pamir-Alay, get acquainted with the culture of nomads or just get new experiences. Wealthy travelers from the CIS countries, mainly from Russia, can also be classified as tourists with similar interests – in recent years their share in the total number of tourists has grown and currently occupies about 25%. The above assessment of the structure of the tourist flow to the region correlates with the data of the NSC KR²³ on the main countries of arrival of foreign citizens in Kyrgyzstan before and in the first year of the COVID-19 pandemic:

²³National Statistical Committee of the Kyrgyz Republic (2022). Tourism in Kyrgyzstan 2016-2020 [Online]. Available at: <http://www.stat.kg/ru/publications/sbornik-turizm-v-kyrgyzstane/>

Table 14. Number of arrivals of foreign citizens from the CIS countries (in thousand people)

	2016	2017	2018	2019	2020
Azerbaijan	8.5	9.8	8.6	7.2	1.6
Armenia	1.9	1.4	1.1	1.2	0.2
Belarus	4.9	4.9	5.1	5.1	2.4
Kazakhstan	2,769.1	2,778.5	2690.8	2915.6	553.7
Moldova	3.3	2.7	2.8	2.9	0.8
Russia	467.9	493.3	507.9	546.7	147.0
Tajikistan	262.9	388.2	182.5	181.4	50.3
Turkmenistan	8.5	0.7	1.3	1.3	0.2
Uzbekistan	374.4	721.2	3363.7	4662.3	1425.3
Ukraine	8.4	7.9	7.2	7.8	2.4

Table 15. Number of arrivals of foreign citizens from other countries (thousand people)

	2016	2017	2018	2019	2020
Australia	2.3	2.4	2.7	3.3	0.3
Austria	1.4	1.5	1.6	2.3	0.2
Germany	11.3	10.3	22.7	24.9	2.4
Georgia	5.4	6.7	6.5	6.8	1.6
Israel	2.9	3.4	4.7	3.8	0.1
India	10.3	19.6	26.0	20.1	2.5
Iran	1.3	1.9	2.2	2.2	0.4
Italy	4.1	3.1	3.8	4.3	0.5
China	50.2	41.3	36.0	38.4	3.8
Korea	10.4	13.8	14.4	16.1	2.1
Singapore	0.5	0.5	0.8	1.0	0.0
UAE	0.7	1.6	4.9	4.5	0.3
Pakistan	1.3	2.0	3.2	9.4	6.9
Poland	2.6	3.4	4.5	4.6	0.2
Great Britain	8.1	6.5	7.5	8.1	1.1
USA	10.9	14.0	16.1	17.0	2.8
Türkiye	61.8	66.1	69.3	65.2	27.6
France	6.1	7.5	8.1	9.3	0.7
Switzerland	2.7	2.9	3.3	3.2	0.3
Sweden	1.0	1.4	1.4	1.4	0.2
Czech	1.6	2.0	2.1	2.2	0.1
Japan	3.4	3.5	4.3	5.1	0.3

As can be seen from tables 14 and 15, citizens of Uzbekistan, Kazakhstan, Russia and Tajikistan visit Kyrgyzstan the most among the CIS countries. Of the far abroad countries, Kyrgyzstan was visited most of all by travelers from China, Germany, France, India, Korea and the USA.

Taking into account the above statistical calculations and the tourism profile of the Osh Region, the most promising target markets for the import of tourists are the following regions and countries.

Table 16. Target markets to attract foreign tourists to the Osh Region

REGIONS OF THE WORLD	MAIN COUNTRIES	DIRECTIONS
Western Europe	1. Germany 2. France 3. Switzerland 4. Netherlands 5. Great Britain	<ul style="list-style-type: none"> • Eco and ethno tourism • Bicycle and motorcycle tours • Trekking, hiking • Horse tours • Gastro tourism • Mountaineering • Educational tourism
Central Europe	1. Poland 2. Czech Republic	
North America	1. USA 2. Canada	
Middle East	1. Saudi Arabia 2. Turkey 3. UAE	<ul style="list-style-type: none"> • Horse tours • Hiking • Hunting tours • Educational tourism
South-East Asia and South Asia	1. China 2. India 3. South Korea 4. Pakistan 5. Japan	<ul style="list-style-type: none"> • Horse tours. • Photo tours. • Trekking, hiking • Eco and ethno tourism
CIS/former USSR countries	1. Russia 2. Ukraine 3. Azerbaijan 4. Georgia	<ul style="list-style-type: none"> • Educational tourism • Gastro tourism • Horse tours. • Hiking • Mountaineering
Central Asia	1. Uzbekistan. 2. Kazakhstan 3. Tajikistan	<ul style="list-style-type: none"> • Sacred tourism • Educational tourism • Gastro tourism • Horse tours
Other regions	1. Australia 2. New Zealand 3. Brazil 4. Argentina	<ul style="list-style-type: none"> • Eco-ethno tourism • Gastro tourism • Horse tours • Bicycle tours • Trekking • Mountaineering

One of the goals of this strategy is to attract more travelers to the Osh Region who are willing to spend time here and leave money. In order to do this, it is necessary to define **the average portrait of a tourist**.

Based on conversations with regional tour operators, we can say that the Osh Region is visited by completely different categories of tourists. These include tourists coming by car with their families and friends from Bishkek, the increasing flows of tourists from the Fergana Valley of Uzbekistan in recent years (often combining visits to Osh relatives with trips around the region). The region enjoys stable demand from travelers from Europe and America, mostly young and middle-aged people. There are also single and group (in companies) visits to the region mainly by young tourists from CIS countries, mainly from Russia and Kazakhstan. In separate groups of tourists should be included mountain climbers (Europe, North America, CIS), as well as a small number of wealthy tourists from all over the world, who come to ski (freeride, heli-ski, etc.) or hunt high mountain animals.

Given the limited capacity of the Osh Region in terms of quality of tourist services (their improvement is a long and complex process) and infrastructure (it requires significant costs and is designed for a medium-term period), we believe it appropriate to focus on the time of stay of tourists in the Osh Region. In other words, the tourism sector should earn not on the daily expenses of tourists, but rather on increasing the time they spend here. Therefore the main focus is proposed to be on the following segments.

Tours for group tourists. This category of tourists, as a rule, is travelers of various ages (adults) in the number of 10-20 people usually from a certain country (for example Turks, Poles, French) who come to the region for 2-3 days in groups organized by tour operators. These tourists need a standard set of tourist services: reliable transportation, comfortable accommodation (guest house, adapted yurt), three meals a day (this should include European, vegetarian and local cuisine), equipped toilet, hot water, electricity and Internet. In addition, it is important to provide them with a group of trained guides who know the region, the language, the geography of the area, know how to provide medical care, who are able to handle horses, etc.

- In order to organize more such tours, it is advisable to consider the possibility of inviting tour operators from Bishkek and Central Asian countries for cooperation, and invite them on a study tour to the Osh Region. These trips will demonstrate that local tourism service providers (e.g., CBT offices) are reliable partners and have sufficient capacity to work with international tourists. One of the most effective mechanisms for establishing cooperation with tour operators is *international tourism exhibitions* (see paragraph 3.2.4.).

Individual and small group tourists focused on light adventure tourism. These travelers are interested in active recreation and/or solitude with nature for 7-14 days. As a rule, they are interested in communicating with local people, getting acquainted with their culture, everyday life and cuisine. They want the "local" experience, but they also want the amenities mentioned above. Their average age is 30 years old for solo travelers and 50 to 70 years old for small group tours. This category of tourists has a higher budget and are willing to pay a premium if circumstances so require.

Traditional tourists. This diverse category of tourists tends to be budget-conscious and reluctant to spend money on guides and organized tours. At the same time, these travelers play an important role in the tourism development cycle, as they often act as "pioneers" of a new tourist destination/product, thus helping travel companies to identify popular locations and other categories of tourists to discover new destinations. This is especially important given the prevalence of social media, where many travelers share photos and stories about what they saw.

* * *

In order to conduct a coordinated policy on marketing support of the Osh Region's tourism sector, the consultant considers it expedient **to create a single coordinating body** throughout the region. Since provincial and district state administrations of the Kyrgyz Republic are not entitled to have separate marketing units in accordance with the national legislation, it is proposed to implement this initiative as follows (see also Figure 33).

1. Establish that the Joint Council for Tourism Development of the Osh Region shall be in charge of marketing policy in the field of tourism (the proposal to merge the existing Tourism Councils under the PRP KR in Osh Province and the Osh Mayor's Office into the Joint Council of the Osh Region is contained in the STDSP Action Plan);
2. Set up a permanent "Committee for the Coordination of Tourism Marketing Activities" under the Joint Council;
3. Include in this Committee the key tour operators of the region and representatives of regional and district administrations responsible for tourism development, with a total of up to 7 people;

4. Appoint as the Chairman of the Committee a representative of the tourism business from among leading tour operators of the region, for example, from “Destination OSH” or the “Association of Tour Operators of the Silk Road”;
5. Entrust the Committee and its members with the management and coordination of the region-wide marketing policy in the field of tourism.



Figure 33. Scheme of the proposed model for managing the marketing activities of the region

The **concept of Osh Region's tourism brand** should represent a whole image and convey a capacious message about the tourism industry of the region and its constituent parts. In the marketing promotion of tourism at the regional, republican, international levels, as well as in the conduct of tourism events of national and international importance, the Osh Region should act under a single tourism meta-brand "**Osh - Silk Road Provider**". When conducting tourism events or promotional activities of district significance, each district can act under its own tourism brand or using a region-wide meta-brand.



Figure 34. Tourism brand “Osh – Silk Road Provider”

Thus, at the global level, a single tourism image of the Osh Region as a reliable provider of tourist services on the Silk Road will be formed. At the same time, potential stakeholders (tourists, tour

operators, related organizations) will have a clear picture and idea of the tourism image and products of the region.

In turn, **tourism events** shall be the main tools to attract tourists to the Osh Region. As the world practice shows, in the absence of pronounced tourism dominants of global significance such as the Pyramids of Egypt or the Great Wall of China, the presentation of beautiful natural landscapes as a tourist destination is not enough. The global tourist, especially from the developed world, is interested not only in a beautiful or historical area, but to a greater extent in the activities in/around this locality. These can be festivals, exhibitions, tours and other tourism events that provide a spectacle, and therefore an experience. It is impressions that make a person travel.

Developing this architecture of tourism branding for the Osh Region, the consultant proceeds from the need for ease of perception and applied effectiveness. In other words, the proposed image and branding concept should be easily applicable to ordinary stakeholders in the formation of their own tourism brand or the promotion of a region-wide meta-brand.

In this regard, the following conceptual nexus is proposed: **“Tourism brand - Tourism event”**. By these it is understood that for each developed brand (a form of positioning of a separate district of the Osh Region), a set of appropriate tourism events is developed.

Ultimately, each district/part of the region will have its own tourism brand, on the basis of which its unique image will be built. This will allow a district to position itself in the national/world tourism market. At the same time, filling the brand with relevant events will help unlock the tourism potential of the district, and as a result, it will have a positive impact on its economic development.

Thus, the region's tourism brand will act as a **marketing image** that answers the question *"What is the Osh Region?"* It should distinguish the region from its closest competitors in Central Asia, many of which do not have their own regional brands today. The implementation of this strategy will allow the Osh Region to gain such an advantage. In fact, a precedent will be created when a separate region of Central Asia enters the international tourism market with its own tourism brand.



Tourist events act as a kind of **tourism products of the region**, with which the Osh Region will attract tourists, answering the question *"Why go to the Osh Region?"* The Osh Region's tourist sites and destinations on their own are not attractive enough for many international tourists, but together, thanks to the package offer, acting under a single brand, they can entice new tourists.

3.2.2. Multi-level branding and a cluster approach to organizing events

As already noted, the project team decided to consider Osh province and Osh city together, introducing the term “the Osh Region” for the purposes of this study.

An integral part of the region – Osh province consists of 7 districts, each of which has its own tourism advantages and characteristic differences. At the same time, only Chong- Alay district has a certain degree of recognition among international tourists, largely due to Lenin Peak. The remaining 6 districts of the province have not yet managed to form any positive tourist image even in the domestic market of Kyrgyzstan.

Taking into account the objectives of this study and the logic of the integrated positioning of the Osh Region and its constituent parts, it is recommended to develop the tourism brands of Osh province under the auspices and within the style of the Osh Region's meta-brand "Silk Road Provider". In addition, it is proposed to take as a basis the principle "One object - one brand", in other words, to form a brand around a particular most famous tourist destination. This will significantly save the financial and time resources of local stakeholders in building an attractive tourist image of the districts, minimizing the risks of wasting limited resources.

According to the results of several rounds of focus group discussions with regional tour operators in 2022, as well as consultations with representatives of the PRP KR in Osh province and the Osh Mayor's Office, the Consultant selected 9 destinations to build an associative tourism image of each part of the Osh Region (more details on these locations can be found in paragraph 3.3):

1. Uzgen district No. 1 (city) – the rice mill as an element of gastronomy;
2. Uzgen district No. 2 (nature) – Kara- Shoro National Park;
3. Kara-Kulja district – Alaykuu Valley;
4. Nookat district – Abshyr-Ata Waterfall;
5. Aravan district – petroglyphs at "Duldul-Ata";
6. Chong-Alay district – Lenin Peak;
7. Alay district – Sary-Oy Gorge;
8. Kara- Suu district – a large near-border merchandise market;
9. Osh city – a historical bazaar.

These tourist locations were selected according to the following criteria:

- availability of tourism potential - historical and cultural, natural and climatic, spiritual and sacred features, strengths;
- availability of infrastructure facilities - roads, electricity, proximity to settlements, toilets, public transport;
- desire of local government bodies and tour operators to develop these tourist destinations.

In order to visually convey the tourism image of each of the Osh Region's constituent parts, the corresponding logos were designed in a single corporate style (see Fig. 35).

In order to revive the region-wide meta-brand and popularize the tourist brands of the constituent parts of the Osh Region, it makes sense to fill the new branding of the region with event content. To this end, it is proposed to hold **an annual set of events under the umbrella term of SILK ROAD FEST** as the meta-event of the Osh Region (see Figure 37; more details, including programmatic results, can be found in paragraph 3.2.3).

SILK ROAD FEST is a festival of countries related to the Silk Road. The festival represents the cultural peculiarities of the peoples living along the historical transcontinental route: history, religion, art, heroes, symbols, traditions and everyday life, national sports. Its implementation will serve as a catalyst for intercultural dialogue, harmony and good neighborliness in the vast Eurasian continent.

The objectives of the festival are as follows:

1. Promotion of the Osh Region's tourism brand in the national, regional and international tourism markets;
2. Attracting new tourists and tour operators to the Osh Region;
3. Providing the world with new opportunities to learn more about the culture of the Silk Road countries through the Osh Region;
4. Tourism and cultural consolidation of the countries of the Silk Road through the single inter-regional festival.

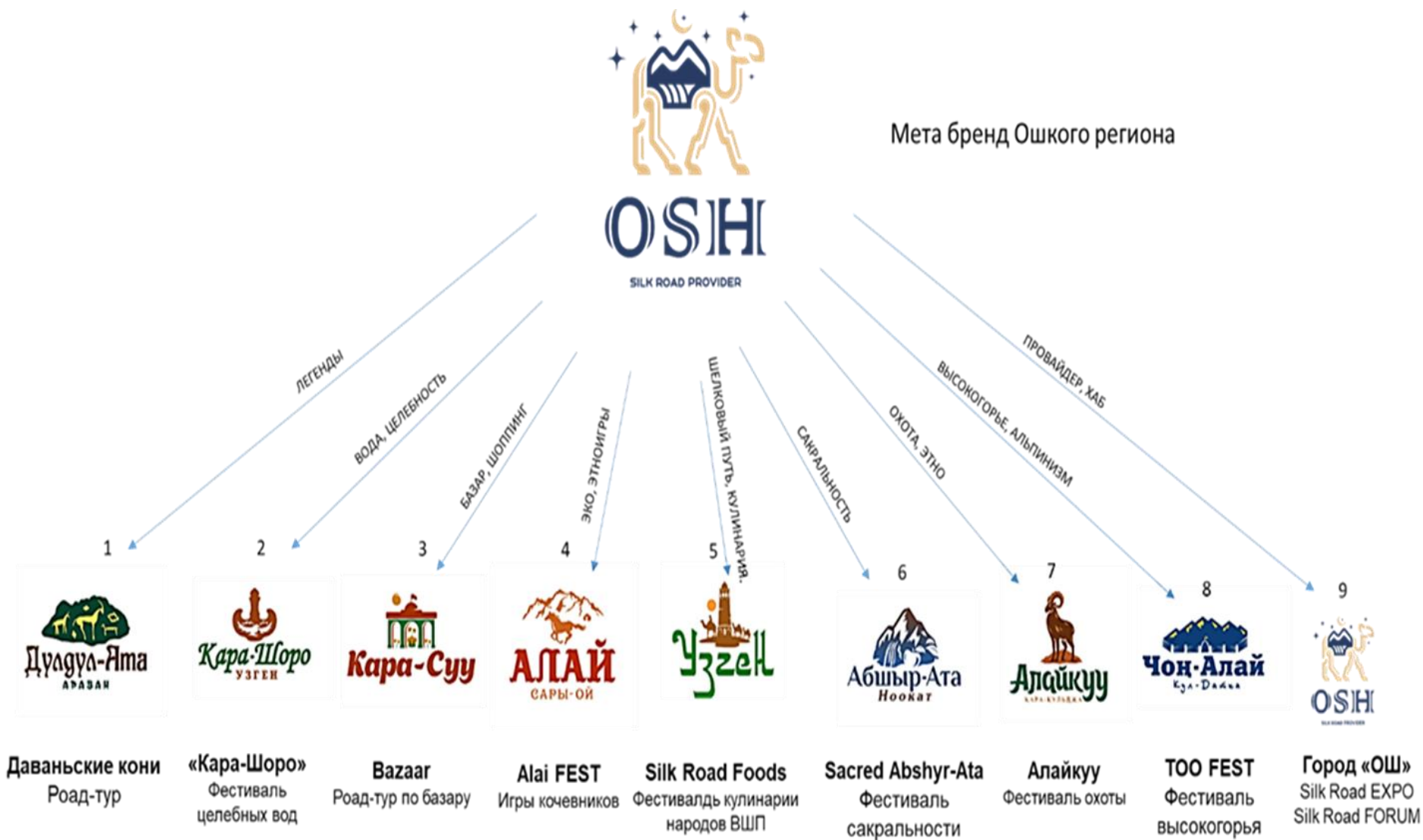


Figure 35. Brands of the constituent parts of the Osh Region, united by the meta-brand “Osh – Silk Road provider”

“SILK ROAD FEST ” consists of several events that will be held in each of the constituent parts of the Osh Region.

Table 17. SILK ROAD FEST event calendar				
No.	Location	Name	Description	Dates
SILK ROAD CITIES				
1	Osh city: 1. PPP KR in Osh province 2. Osh Mayor’s Office	a) SILK ROAD EXPO b) SILK ROAD FORUM c) OSH FEST	a) Tourist Exhibition of Nations b) International Tourism Forum c) International tourism festival	Spring Summer
2	Uzgen city	SILK ROAD FOODS	Festival of cuisines of the peoples of the Silk Road.	
3	Kara-Suu city	Road tour “Bazaar”	Tour to the near-border market of Kara-Suu	
NOMADIC				
4	Kara-Kulja district	"Alaykuu"	Hunting festival	Summer
5	Alay district	“Alay FEST”	Nomad culture festival (games of nomads)	
UPLANDS				
6	Chong-Alay district	“Too FEST”	Highlands festival	Summer
HEALING				
7	Uzgen district	"Kara-Shoro"	Water festival in the Kara-Shoro National Park.	Summer
SACREDNESS				
8	Nookat district	“Abshyr-Ata”	Spiritual and sacred festival	Autumn
9	Aravan district	Sacred Road Tour “Heavenly Horses”	Tour to the legendary places of Aravan - the complex "Duldul-At" and the cave "Chil-Ustun".	

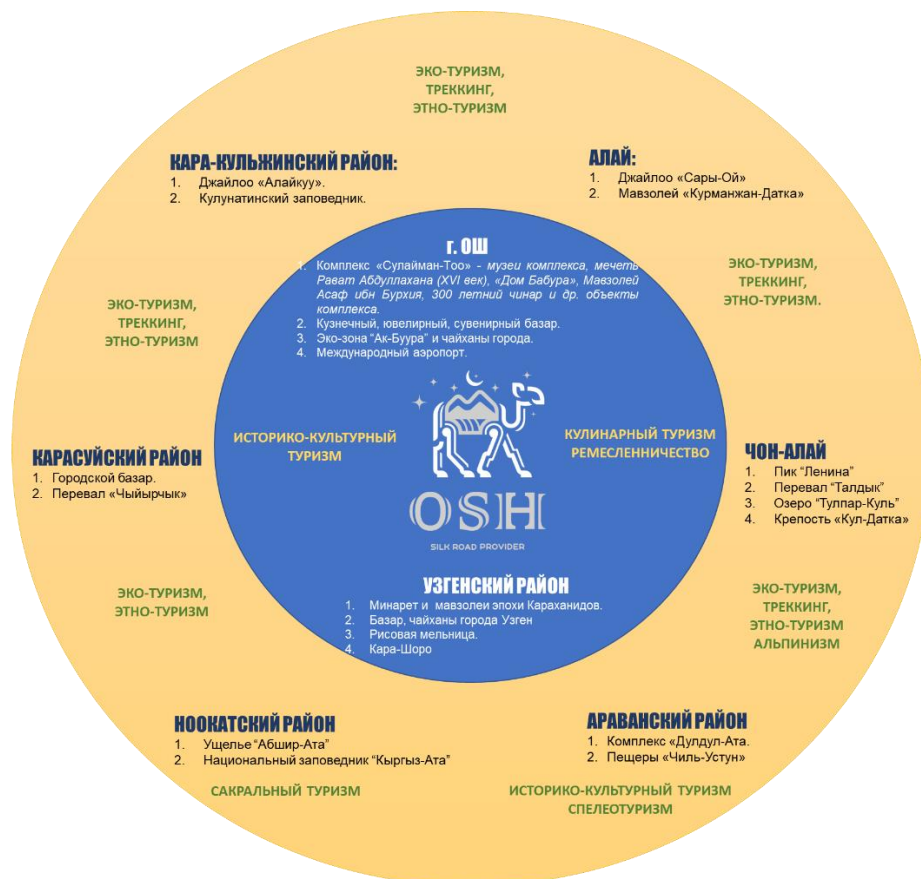


Figure 36. Meta-brand of the Osh Region and its content



Figure 37. Meta-event of the Osh Region and its content

In Chapter 2, the project consultants proposed the conceptual Model for the development of tourism in the Osh Region, abbreviated as SMG, reflecting the synergy of the heritage of the Silk Road, the opportunities of the mountaineous landscape (Mountains) and the diversity of gastronomy of the East (Gastronomy). In line with this model, for sustainable tourism development it was proposed to divide the territory of the Osh Region into 5 territorial tourist clusters

Taking into account the sub-regional historical, cultural and geographical peculiarities of the Osh Region, it is proposed to use this approach in developing the marketing promotion strategy likewise.

According to our classification, the **"SILK ROAD CITIES" cluster** includes large urban settlements of the region with a rich cultural and historical heritage, exquisite oriental cuisine and preserved historical and architectural monuments. As a direction, the cluster is focused on educational tourism.

The undisputed dominant of the cluster is **Osh city** as the only settlement with an international airport, a significant number of hotels, guest houses and catering facilities.



Figure 38. Tourism brand of Osh city

The tourism image - SILK ROAD PROVIDER

The brand logo reflects:

- a) Camel - the main element of the caravan and a symbol of the Silk Road;
- b) Sulaiman-Too sacred mountain in Osh;
- c) The Ak-Buura River, flowing through the city of Osh;
- d) The night sky – a crescent moon and stars.

The associative components of the tourism brand:

- a) Silk Road;
- b) Culture of the East;
- c) Bazaar;
- d) Gastrotourism.

The basic idea of the Osh city marketing promotion:

The city of Osh needs to be promoted as *the main logistics hub of the Fergana Valley on the route of the historical Silk Road*. This is reinforced by the presence of the largest airport in the Fergana Valley of international importance, the status of a city of national importance, a good range of hotels and hotels, and a high concentration of tour operators.

The tourism events under the Osh city brand:

1) **SILK ROAD EXPO** is a cultural exhibition and information presentation of tourism in the Osh Region through the cultures of the peoples of the Silk Road, its features and diversity, as well as goods and services created on the basis of ethno-cultural values. Thematic areas of the exhibition:

- ✓ Ethno-tourism. Tourist services provided on the basis of ethnic culture;
- ✓ Ethnic consumer goods. Consumer goods created on the basis of the traditions and way of life of the Silk Road countries and peoples;
- ✓ Ethno-fashion. Clothing created on the basis of the ethnic culture of the Silk Road countries and peoples;
- ✓ Ethno-cinema. Screening of feature films and documentaries based on the history, traditions and life of the Silk Road countries and peoples.

2) **SILK ROAD FORUM** is an international tourism forum of the Silk Road countries and peoples. The forum goals:

- a) Create an international tourism dialogue platform in the Osh Region to discuss acute issues of regional tourism.
- b) Form a sustainable image of the Silk Road Provider for the Osh Region.

Forum members:

- a) Tour operators from states located on the historical Silk Road;
- b) Tourism experts from Central Asia and the world;
- c) Honored guests are ambassadors and representatives of the countries of Central Asia, South Asia, the Middle and Far East, the scientific community, companies and international organizations.

3) **OSH FEST** is an annual theatrical festival designed to demonstrate the historical and cultural features of Osh and the possibilities of local tourist destinations.

Expected results from SILK ROAD EXPO, SILK ROAD FORUM and OSH FEST ²⁴:

- a) Forming for the Osh Region a sustainable reputation as one of the main actors in the tourism market of Central Asia on the theme of the Silk Road;
- b) The tourism industry of the Osh region and the Kyrgyz Republic will be able to access the latest global tourism trends and technologies;
- c) Increasing the tourist flow to the region.

The second most important city in the Osh region is **Uzgen city**. Noticeably inferior to the dominant city of Osh in terms of its tourist resources, it nevertheless provides additional opportunities for tourists visiting the region to get acquainted with the history and culture of the cities of the Great Silk Road. In particular, the city is known for its architectural complex of the 12th century, picturesque views of the Kara-Darya River and the technology of growing unkiyal red

²⁴The provisional budget for the organization of the expo and forum can be found in Appendix 3d.

devzira rice. The types of tourism products offered here include visiting the mentioned complex, an ancient rice mill (agro- and gastro-tourism), a city bazaar, mosques.

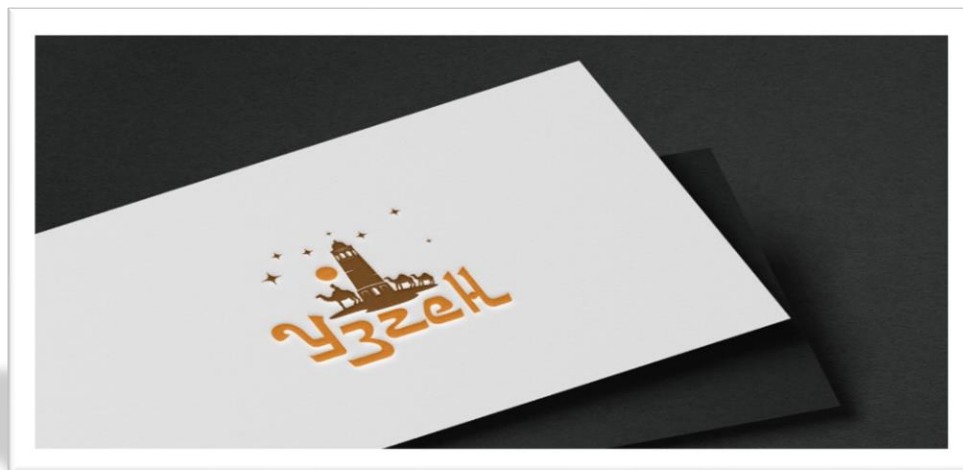


Figure 39 . Tourism brand of Uzgen city

The tourism image - ANCIENT UZGEN

The brand logo reflects:

- a) The main tourist attraction of Uzgen district and Uzgen city –the Minaret of the 12th century of the Kara-Khanid era;
- b) Caravan - as a symbol of the Silk Road;
- c) The night full moon and stars are elements from the meta-brand of the Osh Region.

The associative components of a tourism brand:

- a) Gastro tourism. the Silk Road;
- b) Ancient culture of the East;
- c) Bazaar;
- d) Rice mill;
- e) Gastrotourism.

The basic idea of the Uzgen city marketing promotion:

When promoting Uzgen city it is necessary to focus on *historical antiquity, ancient bazaars and gastronomy*. The presence of historical and cultural monuments and objects of ancient states, eastern bazaar with minarets and Uzgen rice, which is widely known in the Fergana Valley, together will convey the perception of an *ancient eastern city*.

The tourism event under the brand:

SILK ROAD FOODS is a culinary festival of the Silk Road peoples. Since ancient times, Uzgen has been famous for its Devzira rice, which is perfect for cooking pilaf. Ethnic diversity and proximity to the city of Osh makes Uzgen an ideal place for a culinary festival.

The culinary festival program:

- ✓ Pilaf fest. Production and presentation of varieties of pilaf;
- ✓ Show program with culinary competitions, Samsa party;
- ✓ Culinary master classes from teahouses;
- ✓ Tea ceremony "Osh tea";
- ✓ Attractions for children;
- ✓ Daily concert program.

Requirements for participants:

- ✓ Branding of the pavilion with its own and regional meta-brand;
- ✓ Show-representation of a culinary brand-product;
- ✓ Sanitary standards - culinary gloves, cleanliness of the pavilion, etc.

In the immediate vicinity of Osh is **Kara-Suu city**. After the collapse of the USSR, the city became widely known throughout Central Asia due to its huge merchandise market. Many tour operators in Kyrgyzstan organize here special shopping tours with an oriental flavor for foreign tourists.



Figure 40. Tourism brand of Kara-Suu district

The tourism image - MANY-FACED KARA-SUU

The brand logo reflects:

- a) The main gate of the central market of Kara-Suu ;
- b) Cotton is one of the main agricultural crops of Kara-Suu district;
- c) The night full moon and stars are the elements of the meta-brand of the Osh Region.

The associative components of the tourism brand:

- a) Diversity of cultures;
- b) Mix of nomadic and sedentary culture;
- c) Variety of gastronomy;
- d) Cotton culture.

The basic idea of the Kara-Suu district marketing promotion:

The Kara-Suu district has the greatest weight in the economy of the Osh Region compared to other districts. The district center has the largest wholesale and retail market in the Ferghana Valley. The border position of the city and the bazaar (on the border with Uzbekistan) led to a deep cultural interpenetration of the Kyrgyz, Uzbeks, Tajiks, Dungans, Koreans and Uighurs, who from ancient times conducted joint trade in these lands. In this regard, Kara-Suu district should be promoted as a *multi-faceted shopping area that* combines all elements of the cultures of different peoples of modern Kyrgyzstan and Central Asia.

The tourism event under the brand:

ROAD - TOUR "BAZAAR" is a specialized tour of the Kara-Suu bazaar may become the main tourist product of Kara-Suu district, providing travelers with an excellent opportunity to get in touch with elements of the Eastern trade culture.

The proposed tour program:

1. Visiting shopping arcades – clothing, grocery, industrial;
2. Demonstration of the cross-border trade process;
3. Culinary tour through chaikhanas of the bazaar – Kyrgyz, Uzbek, Uighur cuisines.

Taking into account the interests and needs of tourists interested in staying within the territory of the Cities of the Silk Road cluster, it is possible to somewhat “dilute” the tourist program by organizing 1-2 day trips to **the Kara-Shoro National Park in Uzgen district** for active (trekking, camping, hiking) and passive recreation (jailoo-tourism (overnight stay in yurts, acquaintance with the life of nomads), agrotourism).



Figure 41 . Tourism brand of Kara-Shoro

The tourism image - HEALING KARA-SHORO

The brand logo reflects:

- a) The symbol of water is the Kyrgyz national vessel “Köökör”;
- b) Mountains, forests and the Kara-Shoro river;
- c) Stars - elements from the meta-brand of the Osh Region.

The associative components of the brand:

- a) Unique mineral spring;
- b) Mountain fauna;
- c) Legends.

The basic idea of the Kara-Shoro marketing promotion:

The Kara-Shoro National Park is famous for its mineral water springs which are known for their healing properties. *Therapeutic water* is the main element around which the advertising and information campaign of the Kara-Shoro National Park should be built. Thanks to the unique properties of underground springs, Kara-Shoro compares favorably with other national parks in Kyrgyzstan. It seems that a competent combination of medical tourism with ecological tourism could provide a significant influx of tourists to this national park.

The tourism event under the brand:

Despite the abundance of water resources, there are no festivals dedicated to water in Kyrgyzstan. The project consultants suggest that it would be expedient to recommend the authorities and the public of Uzgen district to think about holding the annual summer **Kara-Shoro Water festival in the Kara-Shoro National Park**. There are all the necessary resources for this - the Kara-Shoro River, a hot climate, a beautiful mountainous forest landscape and healing mineral springs.

The festival program could include:

1. Presentation by medical experts (nutritionists, gastroenterologists, etc.) of the healing properties of the mineral water "Kara-Shoro";
2. A fun contest of mass dousing as a sign of friendship and forgiveness;
3. Horse riding tour in the national park "Kara-Shoro";
4. Presentation of Kyrgyz ethno-cultural culture - master-classes on cooking, felting, horse dressing, etc;
5. Evening ethno-concert.

The **"PAMIR-ALAY MOUNTAINS" cluster** covers the territory of Alay district after the Taldyk pass along the Osh-Sary-Tash highway, entire Chong-Alay district, as well as the mountainous part of Nookat district. As a direction, the cluster is focused on mountain adventure tourism. It is proposed to build the tourism image and brand of the cluster around the features of Chong-Alay district of Osh province, which is entirely included in the coverage area of the cluster.



Figure 42. Tourism brand of Chong-Alay district

The tourism image - MAJESTIC CHONG-ALAY

The brand logo reflects:

- a) Peaks and glaciers of the Trans-Alay (Chong-Alay) Range;
- b) Mountaineer;
- c) Fortress "Kul-Datka" as the main historical landmark of Chong-Alay district;
- d) Stars are elements from the meta-brand of the Osh Region.

The associative components of the brand:

- a) Mountaineering;
- b) Tracking.

The basic idea of the Chong-Alay district marketing promotion:

The majestic seven-thousander peaks and mountaineering are the main strategic advantages of Chong-Alay district. Thanks to the world-famous mountain peaks and the undying interest in mountaineering, the district should be associated with *high-altitude landscape and first-class mountaineering*.

The tourism event under the brand:

Highland's festival "TOO FEST". The purpose of the festival is to show the culture and life of the inhabitants of the highlands, who have been living at an altitude of more than 3000 meters since ancient times.

Its preliminary program:

- ✓ Demonstration of the life and culture of the highlands' inhabitants;
- ✓ Master classes in mountaineering;
- ✓ Yak/horse riding, national games;
- ✓ Alpine cuisine food court;
- ✓ Master classes on making koumiss;
- ✓ Open- air with musical accompaniment, yoga at dawn;
- ✓ Fair of national handicrafts;
- ✓ Trekking between and through the Trans-Alay and Alay ranges, to Lake Tulpar-Kul.

The **"ETNOTOURISM IN ALAY" cluster** covers the territory of Kara- Suu and Alay districts along the Osh - Sary-Tash highway to the Taldyk pass. Historically, the cluster territory was the center of residence of the Alay Kyrgyz and their leader Kurmanjan-Datka, a major public and political figure of the 19th century. In this regard, it is advisable to focus the cluster on the development of ethno-tourism, introducing travelers to the culture and life of the Kyrgyz.

The dominant of the cluster is the district center – **Gulcha village**, which has guest houses, cafe-restaurants, as well as a cultural attraction - the Kurmanjan-Datka Museum. At the same time, the centers of tourism development here may be mountain valleys and gorges (the most famous of them is the **Sary-Oy gorge**) along the Osh – Sary-Tash highway, as well as the Chyiyrchyk pass.

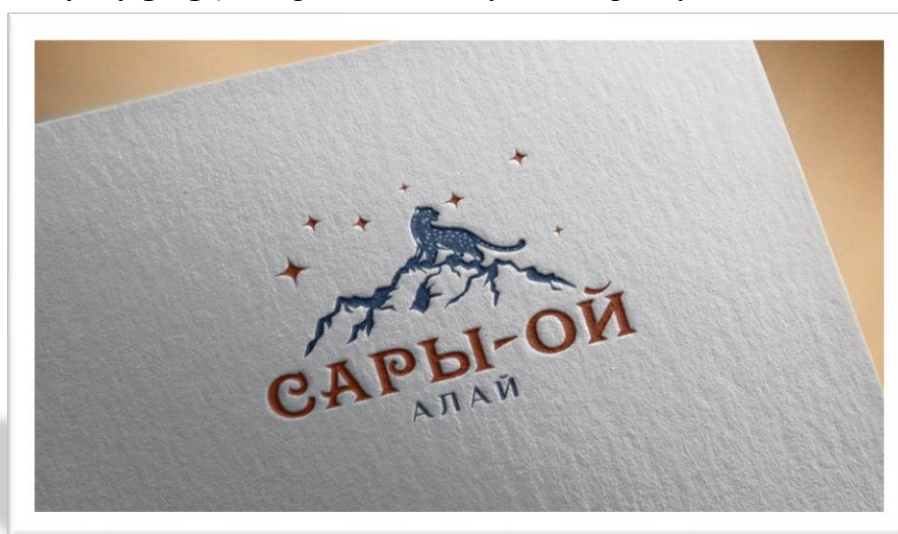


Figure 43. Proposed tourism brand of Alay district with a focus on the Sary-Oy Gorge

The tourism image - EPICAL ALAY

The brand logo reflects:

- a) Sary-Oy Gorge as one of the main tourist destinations of the district;
- b) Ilbirs (snow leopard) as one of the totems of the Kyrgyz people, associated with the “Alay Queen” Kurmanjan-Datka;
- c) Stars are elements from the meta-brand of the Osh Region.

The associative components of the brand:

- a) Live nature;

- b) Camping;
- c) Ethnoculture;
- d) Nomadic mountain culture;
- e) Trekking, hiking.

The basic idea of the Alay district marketing promotion:

Alay is known primarily for its nomadic ethnicity and historical figures Kurmanjan Datka and Aylmbek Datka, who left an epoch-making mark in the history of the Kyrgyz people. Fertile pastures and middle mountains contributed to the development of a nomadic culture among the inhabitants of this land, which differs from the culture of the inhabitants of neighboring regions in the Ferghana Valley. Thus, nomadic ethnicity is the main advantage for tourism development in Alay district. In other words, here we are talking primarily about tourism development that combines ethno and eco components. Accordingly, in the marketing promotion of the district, the emphasis should be placed *on the image nomadism on the Silk Road*.

The tourism event under the brand:

“ALAY FEST” - festival of nomadism and games of nomads. The proposed place is the Sary-Oy gorge.

Festival of nomadic culture and ethnicity of the Kyrgyz people.

- ✓ Nomad Games - demonstration of national sports and competitions (see below);
- ✓ Demonstration of assembling a yurt;
- ✓ Master classes in the production of national cuisine;
- ✓ Folklore concert from local masters of art.

The types of Kyrgyz national games proposed for holding at the festival:

Er enish is a traditional Kyrgyz horsemen's wrestling discipline. This discipline was generated by military needs and served military purposes. The key to victory in *er enish* is the skill and strength of the rider as well as his horse. Two wrestlers, stripped to the waist, must wear a "kushak" (belt), scarf, pants of strong material, boots, in the hand should be a *kamacha*. In order to win, the wrestler has to pull the opponent off the horse, so that he touches the ground with any part of the body.



Kök börü is an ancient horse-sports game among the Kyrgyz and other peoples of Asia. Another name of the game is "*ulak tartysh*" (the goat dragging game). *Kök börü* is a symbiosis of races and game. By its rules one team involves 12 riders and 12 horses, but at the same time only four players from each team can get in the game. Playing time is three periods of twenty minutes. The aim is to master the goat carcass and the maximum number of times to throw it into the opponent's pot.



*In **Toguz Korgool**, the Kyrgyz version of mancala, a player's goal is to acquire as many korgools as possible. The word "toguz" translates as nine. In the game, each player has nine holes, in each of which there are nine korgools. In Kyrgyz, "korgool" means "sheep rolls." The game used precious stones similar in appearance and size to sheep's rolls. The significance of the game for nomadic Turkic peoples, including the Kyrgyz, is that warlike people played toguz korgool in peacetime and developed their military and strategic thinking abilities.*



***At-Chabysh.** The composition of teams – 3 people: 2 jockeys and 1 coach. The age of the participants must be at least 14 years old. Pacers at least 3 years old and of any breed can participate in the races. Races are held at different distances.*



***Kürösh** is a national belt wrestling. The composition of the team is 4 persons: 2 athletes, 2 coaches, the age of athletes should. Competitions are held in a personal absolute weight category.*



***Ordo** is one of the most widespread games of the Kyrgyz, extending from ancient times to the present. The word "ordo", i.e. horde, itself means "khan's palace, headquarters". The game reproduced the fight to capture the headquarters. The ordo was a kind of military map, with which warriors learned how to defeat the enemy. A circle drawn on the ground signified the territory of the state, and the rivals worked out a plan of battle. Knocking out the khan meant overthrowing the ruler from the throne. The game was also based on the ability to conduct proper internal politics, which is characterized by the observance of caution being already inside the circle, i.e. in power.*



The **"SACRED PLACES OF OSH PROVINCE"** cluster covers the territory of Aravan and Nookat districts of Osh province and is focused on introducing tourists to the sacred sites of the Osh Region. The most famous holy places in the region are located here, they are the **Abshyr-Ata waterfall** in Nookat district, the **sanctuary of ancient horse breeders Duldul-At** and the **Chil-Ustun cave** in Aravan district

Abshyr-Ata is a unique cascading waterfall flowing directly from the stone; it is also the mouth of an underground river and owes its formation to karst phenomena. Near the waterfall there are mazars and rock paintings of the Dauyan era.

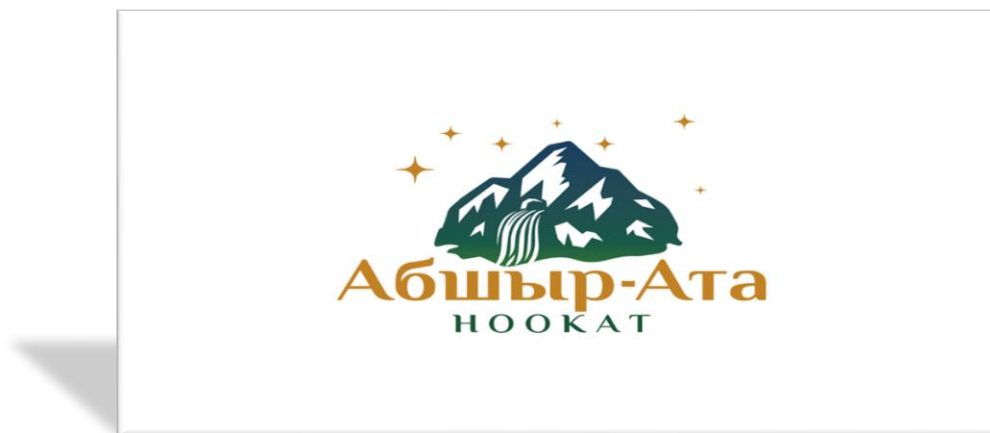


Figure 44. Tourism brand of Nookat district with a focus on the Abshyr-Ata waterfall

The tourism image - SACRED NOOKAT

The brand logo reflects:

- a) Abshyr-Ata waterfall as the main tourist and sacred destination of Nookat district;
- b) Stars are elements from the meta-brand of the Osh Region.

The associative components of the brand:

- a) Mazars;
- b) Legends of Abshyr-Ata;
- c) Iconic filming locations;
- d) Famous Nookat apples.

The basic idea of the Nookat district marketing promotion:

Sacredness should be the main message when promoting Nookat district. The history of Abshyr-Ata is shrouded in ancient legends about the healing properties of water flowing from the waterfall, about the spiritual power of the Sufi cave, from where Muslims began their Hajj to Mecca.

The tourism event under the brand:

SPIRITUAL FESTIVAL "ABSHYR-ATA" aims to increase the flow of tourists from the countries of Central Asia and the Muslim East, who believe in sacred knowledge. The timing is summer. The event program could include the following activities:

- ✓ Tour to the sacred places of the gorge;
- ✓ Presentations, acquaintance with ancient rituals and traditions;
- ✓ Sports and recreation program - gymnastics, breathing exercises;
- ✓ Rites of blessings (bata), purification of the aura according to ancient rituals;

- ✓ Various practices, individual consultation of specialists in traditional medicine and spirituality;
- ✓ Bazaar of esoteric and souvenir products;
- ✓ Bazaar of national cuisine and drinks;
- ✓ Folklore concert.

The **Duldul-Ata area** is a unique historical-sacred complex in the village of Aravan, which has its own unusual history, closely intertwined with the history of the ancient Dauyan kingdom.



Figure 45. Tourism brand of Aravan district with a focus on the Duldul-At tract

The tourism image - LEGENDARY ARAVAN

The brand logo reflects:

- a) Petroglyphs of heavenly horses “Duldul-At”;
- b) Stars are elements from the meta-brand of the Osh Region.

Associative components of the brand:

- a) Mazars;
- b) Legends;
- c) Ancient kingdoms;
- d) Extraterrestrial Beings.

The basic idea of the Aravan district marketing promotion:

Legendariness is the main competitive advantage of the district. Legends about the Dauyan (Ferghana) heavenly horses, argamaks, distinguished by their extraordinary endurance as well as “blood sweating”, for centuries excited the rulers of ancient empires and became the causes of bloody military campaigns. The rock paintings of these horses in the Duldul-At complex remain one of the most striking legacies of the ancient Kingdom of Dauyan, which existed in Central Asia from the 3rd century B.C. to the 5th century A.D. And the Chil-Ustun cave, located not far from this complex, is fraught with many natural mysteries, surrounded by numerous legends, and is popular with regional speleologists. In this regard, in the marketing promotion of tourism in Aravan district, in our opinion, it is advisable to focus on the legends associated with the heavenly horses and the Dauvan kingdom, reinforcing the emerging image with legends associated with the Chil-Ustun cave.

The tourism event under the brand:

SACRED ROAD TOUR “HEAVENLY HORSES” should become one of the main tourism events of Aravan district. To attract the interest of travelers, it is recommended to zone the area around the petroglyphs - the territory of the mosque located near the petroglyphs, a private house, a spring, mazars must be combined into one tourism complex "Duldul-At".

In its finished form, it will have to have the following tourist facilities:

1. Unique petroglyphs of the Dayan (Ferghana) heavenly horses;
2. Mosque with elements of Central Asian architecture;
3. Mazar for ritual cleansing, blessings, requests for protection, etc.;
4. A manor in the ethnic style of the 19 and 20th centuries, where one can perform rituals, get acquainted with the life of the urban Kyrgyz in the pre-Soviet era, and conduct appropriate master classes;
5. Sacred mountain "Duldul-At", on which tourist can make “sacred” trekking and see the surrounding areas.

The sacred road tour can be combined with the Abshyr-Ata sacred festival. Tourists after the Abshyr-Ata festival can visit the sacred complex "Duldul-At".

Geographically the **"ALAYKUU SKY VALLEY"** covers the territory of Kara-Kulja district, bordering with Naryn province, Alay district and China. Its potential tourist products include the organization of trekking, hiking and horseback riding tours, jailoo tourism, and ethnic festivals. Taking into account the low level of anthropogenic impact on the local nature, in the future it would be possible to organize a geopark here.



Figure 46. Tourism brand of Kara-Kulja district

The tourism image - HEAVENLY ALAYKUU

The brand logo reflects:

- a) Mountain sheep (Kara-Kulja) - the main symbol of Kara-Kulja district;
- b) Stars are elements from the meta-brand of the Osh Region.

The associative components of the brand:

- a) Jailoo;
- b) Ethnicity;

- c) Ethno-sport hunting;
- d) Hiking;
- e) Tracking.

The basic idea of the Kara-Kulja district marketing promotion:

Kara-Kulja district, thanks to the Alaykuu high-mountain valley and the symbol of the highlands - the mountain sheep kulzha, should be promoted as a *territory bordering on heaven*. In this regard, the concept of Heaven is the main message in the marketing promotion of this district.

The tourism event under the brand:

Hunting has been the main activity of highland valley dwellers since ancient times. Hunting was one of the main types of subsistence of highlanders. Mountain sheep, mountain goats, roe deer and other mammals were hunted in Alaykuu. According to the epic Manas, the viziers of Manas, led by the wise Bakai, often hunted in this area. In this regard, the main tourism event here could be the **Hunting festival "ALAYKUU"**, which could be held jointly with the Salburuun Hunting Games Federation.

Salburuun is a complex hunting game with hunting birds and dogs. It includes falconry, hunting with golden eagles, archery, mounted archery, taigan hunting.

The festival program may include:

- ✓ Hunting competitions with birds of prey;
- ✓ Hunting competitions with hunting dogs;
- ✓ Exposition of birds of prey and dogs;
- ✓ Exhibition of hunting accessories;
- ✓ National games with the participation of tourists;
- ✓ Folklore programs;
- ✓ Building a yurt at speed.

The program of the hunting competition includes the following competitions:

- **Exercise "Chyrga":** Here, each hunter launches his golden eagle in the direction of a moulage made of a fox skin, which the rider is pulling at a gallop behind him. According to the requirements, the golden eagle must fly to the dummy moving at a medium speed and grab it. The time and speed of flight of the bird are evaluated. Through this exercise, the level of training of the golden eagle is determined. According to the rules, a hunter can launch his golden eagle only once.
- **Exercise "Ündök":** In this exercise a golden eagle is set at a distance of 200 meters. At the signal of the judge the hunter starts to call his golden eagle, holding the bait. Here the time of arrival of the golden eagle to the owner's hand is evaluated. Each participant is allowed to call his or her golden eagle once, standing on the ground or riding a horse.
- **"Dalba"** is the flight of a falcon on a lure. This type of competition evaluates the speed of a falcon's flight by launching it on a lure. The lure is made from the feathers of partridge, pheasant and pigeon taken from the tail and wings. According to the rules, the judges mark how many times a falcon flies and imitates an attack on a lure. The winner is determined through the highest number of points.

- *"Taigan zharysh" is dog racing among the breed of greyhounds. The team consists of four people - one leader and three dog owners. Agility of a dog is determined by the speed of its running at a distance of 350 meters. Dogs chase after a dummy made of fox or hare skin, with which the rider rides at a speed of 60-65 kilometers per hour, or the dummy is pulled by a special mechanism. Separate races are held among each breed of greyhounds.*

Thus, the marketing architecture of the Osh region will be built as follows:

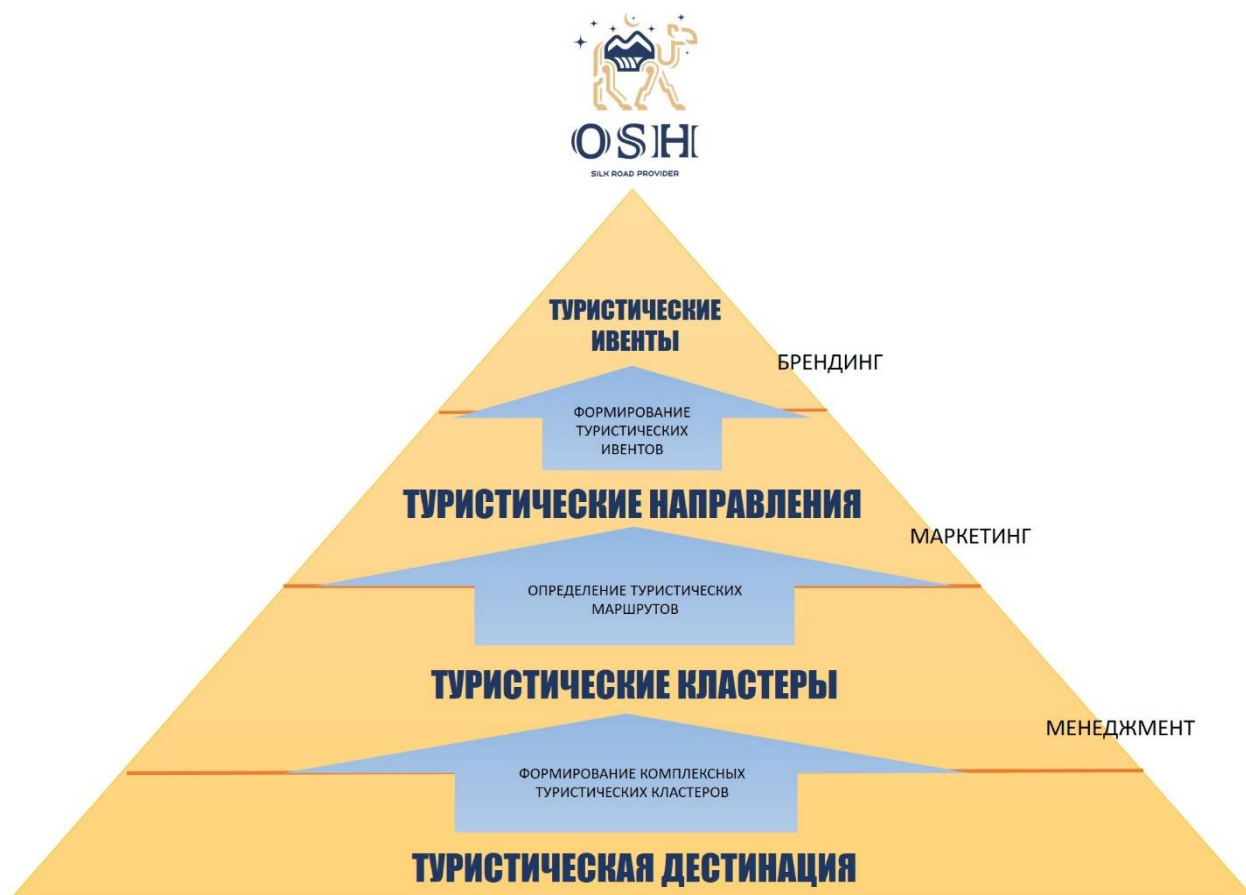


Figure 47. Marketing architecture of the Osh Region

Level 1. Tourist destinations form tourism clusters that are close to each other in terms of themes, potential and conditions.

Level 2. Tourism clusters determine tourist destinations and routes.

Level 3. Tourist destinations form tourism events according to their topics.

Level 4. Tourism events strengthen and reinforce the tourism brand of the Osh Region.

Level 5. Ultimately, the tourism brand of the Osh Region is formed.

3.2.3. Program of marketing activities for 2023-2028

EVENT	SPRING	SUMMER	AUTUMN	WINTER	RESULT
2023 – PRESENTATION STAGE					
Presentation of the Tourism Marketing Program of the Osh Region for 2023-2028	May, Osh				<ol style="list-style-type: none"> 1. Official presentation of the Tourism Marketing Program of the Osh Region. 2. Transfer of the Program to the local authorities of the Osh Region. 3. Official announcement of the launch of the Program.
SILK ROAD FORUM			September 17 Tourism Day		<ol style="list-style-type: none"> 1. International presentation of the tourism potential, program, brand, events of the Osh Region. 2. International message with the official invitation of tourists to participate in the tourism festivals of the Osh Region - SILK ROAD FEST. 3. Conclusion of agreements, memorandums of cooperation between tour operators of the Kyrgyz Republic and abroad, international organizations and relevant departments of the Government of the Kyrgyz Republic.

Preparation for participation in international tourism exhibitions in 2024	<p>Together with the Department of Tourism and TDSF KR.</p> <p>Inclusion of activities in the programs and budgets of the Department of Tourism, TDSF KR, in the local budgets of the Region and districts.</p>				<ol style="list-style-type: none"> 1. Inclusion of activities in the budget of districts and the city of Osh. 2. Inclusion of activities in the Programs of Activities and Budgets of the Department of Tourism, TDSF KR for 2024 and subsequent years. 3. Attracting potential sponsors and international organizations to participate in tourism events in the Osh Region.
Preparations for holding tourist events in the Osh Region for 2024					
Expositions				<p>Art exhibitions - artists, craftsmen, jewelers, writers, sculptors.</p>	<ol style="list-style-type: none"> 1. Filling the winter period with various exhibition and exposition events. 2. Support and development through tourism of various types of art and folk art in the Osh Region.
2024 – STARTUP STAGE					
Participation in the Republican tourism exhibitions with a separate tourism pavilion of the Osh Region	<p>International Tourism Exhibition-Fair “Issyk-Kul ITF”, Cholpon-Ata, Kyrgyzstan.</p>				<ol style="list-style-type: none"> 1. Advertising of a tourist brand and events in the Osh Region and districts. 2. Conclusion of cooperation agreements with tour operators of the Kyrgyz Republic and Central Asia.
Participation in International tourism exhibitions within the	<ol style="list-style-type: none"> 1. International exhibition "KITF", Almaty, Kazakhstan. 				<ol style="list-style-type: none"> 1. Advertising of a tourist brand and events in the Osh Region.

framework of the pavilion of the Kyrgyz Republic	2. Trade expo ITB Berlin.				2. Conclusion of cooperation agreements with tour operators in Central Asia, Europe and the world.
SILK ROAD FORUM	March 21 (Nooruz)				<ol style="list-style-type: none"> 1. Formation of a new tourist vector on the path of the Silk Road represented by the Osh Region, through its own international expert platform. 2. Formation and consolidation of the brand of the Osh Region “Silk Road Provider” at the international level through the presentation (exhibition) of the universe of the Silk Road 3. Attracting tourists to large-scale, authentic tourist events in the Osh Region associated with the Silk Road and the ethnicity of the Kyrgyz people and the East as a whole. 4. Presentation and disclosure of the tourism potential of each Region, attracting the flow of tourists both from the domestic market and from foreign markets.
SILK ROAD EXPO	Osh city				
SILK ROAD FOODS	March 21 (Nooruz)				
	Uzgen city				
Road tour “Bazaar”	March 21 (Nooruz)		Day of Tourism		
	Kara-Suu city		Kara-Suu city		
Osh FEST		Osh			
Highlands festival “Too FEST”		Chong-Alay			
Water festival "Kara-Shoro"		Kara-Shoro			
Hunting festival “Alaykuu”		Kara-Kulja			
Festival of nomadic culture “Alay FEST”		Alay			
Spiritual festival “Abshyr-Ata”				Nookat	
Sacred road tour “Heavenly Horses”				Aravan	
Participation in the Fifth World Nomad Games in the Republic of Kazakhstan		Together with the Department of Tourism			Participation of athletes, artisans and members of the delegation from the Kyrgyz Republic with logos, videos, handouts of promotional materials from the Osh Region.

2025-2028 – DEVELOPMENT STAGE					
Participation in international tourism exhibitions within the framework of the pavilion of the Kyrgyz Republic	1. International exhibition "KITF", Almaty, Kazakhstan. 2. MITT, Moscow. 3. Trade show ITB Berlin. 4. Other tourist exhibitions abroad.				1. Increasing the share of tourism in the economy of the Osh Region. 2. Attracting new foreign tour operators to cooperate with the tourism sector of the region. 3. Increasing the influx of tourists from target countries of the far abroad. 4. Increasing the awareness of the tourism brand and products of the Osh Region. 5. Formation for the Osh Region of the image of one of the global tourist destinations on the Silk Road.
Holding events within the framework of SILK ROAD FEST					6. Increasing the influx of tourists to each district of the Osh Region

3.2.4. Recommendations for participation in international exhibitions

In the tourism industry, exhibitions are one of the most effective means of marketing communications, since many industry actors simultaneously participate in them. Participation in exhibitions provides a wide range of marketing tools that allow one to express itself, its products and how to bring this product to international tourism markets.

A large number of exhibition events, one way or another related to tourism, are held annually in the world. These can be both exhibitions aimed at promoting a certain regional tourism product (“Resorts and Tourism” in Sochi, “Travel Fair” in Anapa), and exhibitions for inbound tour operators, which are held at the location of the main consumers (FITUR (Madrid); BIT (Milan), etc.

International tourism markets and fairs stand out in particular. These are exhibition events, where, along with tourism advertising, active work is carried out to establish contacts and conclude deals between producers of tourism services (hotels, transport companies) and their sellers (tourism companies). The largest international tourism exchanges are ITB (Berlin, exhibition area - 85 thousand square meters), WTM (London - about 5 thousand exhibitors), etc.

Each exhibition is a kind of cross-section of a very specific market situation, it makes it possible not only to search for relevant markets, but also to participate in entering them in the most effective way.


The value of participation in exhibitions lies in the fact that they allow:




- achieve an in-depth understanding of the market situation without focusing on the costly collection of various data;
- identify new trends in the development of the market, identify emerging niches and focus on studying those segments that seem to be the most promising.

For the most effective presentation of the Osh Region (brand, tourism products) at exhibition sites, it is recommended to proceed from the following:


1. It is important to participate in exhibitions within a “united front”, i.e. it is prudent to present the entire tourism potential of the region (destinations, artisans, tour operators, the Tourism Development Councils, etc.). Separate participation of only tour operators, as practice shows, does not give the desired result.
2. A proposal is made to the Department of Tourism under the MEC KR and the TDSF KR to reserve funds in the budgets of these establishments for organizing a separate tourist stand of the Osh Region under the auspices of the Kyrgyz Republic and the region’s new branding.
3. It is proposed to recommend to the state and district administrations of the Osh Region to delegate their own representatives to participate in exhibitions.
4. The function of organizing and coordinating participation in international tourism exhibitions should be entrusted to the proposed OJTDC of the Osh Region, and more precisely to its marketing committee.

**International tourism exhibitions
recommended for participation by representatives of the Osh Region for the presentation
of the region's new tourism marketing policy**

No.	Name	Short description	Period
INTERNATIONAL MARKET			
1	<p>"ITB" International travel market. Federal Republic of Germany. Berlin.</p> 	<ul style="list-style-type: none"> • Held in Berlin since 1966 annually in March for 7 days. One day is given only to professional participants, on the other days the exchange is open to everyone. • Representatives of more than 150 states participate in it - these are ministries and departments, national and regional tourism organizations, hotels and hotel chains, air and cruise companies, booking systems structures, insurance companies, specialized publishing houses, radio and television companies. • During the work of the exchange, conferences, symposiums, receptions on the development of tourism are organized, journalists are accredited for wide coverage of the work of the exchange in the media. 	March April
2	<p>"WORLD TRAVEL MARKET" United Kingdom. London</p> 	<ul style="list-style-type: none"> • The World Travel Market has been held since 1980. • It brings together over 50,000 professionals from over 150 countries. A profitable opportunity for lesser-known countries to make themselves known. • "World Travel Market" in London is distinguished by the fact that large contracts are signed here. 	November December
ASIAN MARKET			
3	<p>JATA EXPO International Tourism Exhibition Japan. Tokyo.</p>	<ul style="list-style-type: none"> • The international tourism exhibition "JATA EXPO" is an event that has a decisive influence on the 	September

		<p>development of the tourism industry in the countries of Southeast Asia,</p> <ul style="list-style-type: none"> • National tourism organizations and enterprises from more than 100 countries of the world take part in the exhibition. • The Japan Tourism Awards recognize outstanding projects and initiatives in the travel and tourism industry by government agencies, business organizations both at home and abroad. 	
4	<p>Arabian Travel Market (ATM)</p> <p>International exhibition of tourism and travel .</p> <p>UAE. Dubai.</p> 	<ul style="list-style-type: none"> • At the ATM exhibition on an area of over 22,000 sq. m involved about 2,500 exhibitors from 80 countries, including 60 national tourism organizations from Europe, the Middle East, Africa and Southeast Asia. • The exhibition is visited by about 30,000 specialists from 135 countries. • Arabian Travel Market (ATM) attracted 40,000 industry professionals in 2017 with US\$2.5 billion in deals. More than 2,500 companies took part in the 12 pavilions of the Dubai World Trade Center, making ATM the largest in history. Arabian Travel Market is the ideal platform for new initiatives and projects, services and offers 	Ma
CIS MARKET			
5	<p>"MITT". Travel and tourism Moscow International Exhibition.</p> <p>Russian Federation. Moscow.</p> 	<ul style="list-style-type: none"> • It has been held since 1994 and is one of the central events in the tourism industry in Russia and the CIS countries. • More than 1,000 exhibitors represent more than 100 countries and 52 regions of Russia from all segments of the tourism industry. 	March
6	<p>SITT / TurSib</p> <p>International exhibition.</p> <p>Russian Federation. Novosibirsk.</p>	<ul style="list-style-type: none"> • SITT is a key event in the professional life of the tourist community in Siberia. 	April May

		<ul style="list-style-type: none"> • Tourist organizations, sanatoriums and hotels in Russia, the CIS, and far-abroad countries become participants in the exhibition. • SITT exhibition has been held since 1989, and is a well-established platform for promoting tourism services in the Siberian regions of Russia. 	
CENTRAL ASIAN MARKET			
7	<p>"KITF" Tourism and Travel.</p> <p>The Republic of Kazakhstan. Almaty.</p> 	<ul style="list-style-type: none"> • Kazakhstan International Exhibition KITF has been held since 2001. • The exhibition is the largest professional tourism platform in Central Asia and the main event of the country's tourism industry. • The best B2B platform for tour operators in Central Asia - the signing of memorandums, agreements, programs of interregional and cross-border cooperation between countries, as well as republican meetings, plenary sessions, road shows, seminars, presentations and other industry events, demonstrate the effectiveness of the exhibition for the Central Asian tourism industry market. • Over the 20 years of the exhibition, companies and organizations from 63 countries of the world have taken part in the exhibition. It is here that international and local companies assess market needs and consumer interest, study the competitive environment, find new effective tools to increase profits, and build a strategy for further work in Central Asia. 	March April
DOMESTIC MARKET OF THE KYRGYZ REPUBLIC			
8	<p>« Issyk - Kul ITF » International Tourism Exhibition.</p> <p>Kyrgyzstan.</p>	<ul style="list-style-type: none"> • Issyk-Kul ITF is an annual meeting place for international travel companies, tour operators and agencies, representatives of government agencies for tourism 	May

	<p>Cholpon-Ata.</p> 	<p>development, airlines, hotels, carriers and the media sector of the Kyrgyz Republic and Central Asian countries.</p> <ul style="list-style-type: none"> • The purpose of the exhibition is to establish business relations between tourism organizations, promote and promote local attractions, tourism products, introduce citizens to the services of ethno-eco-tourism and others. • Issyk-Kul ITF traditionally hosts a presentation and cultural program: <ul style="list-style-type: none"> ✓ <i>solemn concert program and awards ceremony;</i> ✓ <i>master classes,</i> ✓ <i>ethnic games;</i> ✓ <i>exhibition of paintings, exhibition of museum exhibits;</i> ✓ <i>exhibition of handicrafts.</i> 	
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3.3. Commercialization plan for selected tourist destinations

In order to commercialize the tourism sector of the Osh Region, following the results of focus group discussions in Osh, meetings with experts and analysis of the current situation, 7 destinations were selected that can become key tourist sites in the region. The destinations have untapped potential and reflect the natural, ethnographic, cultural, and historical diversity of the region.

Abshyr-Ata is a unique cascade waterfall, flowing directly from the stone. It is the mouth of an underground river and owes its formation to karst phenomena. There are mazars and petroglyphs from the Dayuan era near the waterfall. The destination is located in Nookat district, southwest of Osh.

Alay land, despite its proximity to Osh city and the presence of good roads, is also not very popular as a tourist destination. Most often domestic tourists are attracted by the Chiyirchyk Pass on the border of Kara-Suu and Alay districts, while international tourists use the district as a transit route to Chong-Alay district. Alay district as a whole has an untapped ethnographic potential.

Alaykuu is one of the most remote destinations in Kara-Kulja district. Alaykuu has undiscovered and underestimated tourist potential. It is a unique location with unusual nature, interesting history and the most delicious koumiss.

Duldul-At, Chil-Ustun - destinations in Aravan district. They have common historical roots with the Abshyr-Ata area in Nookat and Sulaiman-Too in Osh. The Chil-Ustun cave complex with unique karst labyrinths is known mainly to speleologists. The Duldul-At area is less popular, despite its ancient, unusual history, and closely connected with the Dayuan Kingdome. Duldul-At is a unique historical monument that has no analogues.

Kara-Shoro is a mineral spring in Uzgen district, which has an untapped potential, unlike the same source in the neighboring Jalalabat province. Although in Soviet times there was the production of bottled water from this source. The destination is located on the territory of the state natural park of the same name at the foot of the Ferghana Ridge.

The rice mill in Uzgen city is an unusual destination with a rich gastronomy-related history associated with the famous Uzgen devzira rice.

The Old bazaar of Osh city is the ancient quarter of the city's central market. For Osh, bazaars have always been more than just an area of lively trade. The revival of the Old Bazaar will have a positive impact on the development of the tourism potential of the entire Osh Region.

ABSHYR-ATA	
<p>Cluster 4. “Sacred places of Osh province”</p>	<p>The cluster covers three locations in the Osh Region: Sulayman Mountain in Osh, the Abshyr-Ata waterfall in Nookat district and the Duldul-At area with the Chil-Ustun cave in Aravan district. The objects are united in one cluster due to their proximity to each other and their common sacred status. Two objects from the cluster are located to the west of the city of Osh, which allows them to be combined into one node that attracts tourists.</p> <p>Locations on the map are combined into a triangle. Its start is at the Gate of Fire at the western slope of Sulayman Mountain in Osh. Further, the route runs to the Duldul-At area and the Chil-Ustun cave and then to the Abshyr-Ata waterfall and finally finishes at the Gate of Water at the northern slope of Sulayman Mountain.</p> <p>All three objects have a rich history, closely connected with the early Middle Ages and even biblical times. They may be of interest to history lovers, those interested in the history of religions and sacred places, as well as pilgrims.</p> <p>Abshyr-Ata, a cascading waterfall (water flows out of a 1,5 hole in two cascades of 15 and 12 meters each) and breaks off in the main channel of the Abshyr -Sai river, which flows along the bottom of the canyon. The waterfall is the mouth of an underground river and owes its formation to karst phenomena. The water in the waterfall is poorly mineralized (mainly with calcium and magnesium). In the vicinity of the waterfall is the source of Kotur-Bulak. In 1975, Abshyr-Ata was declared a geological reserve.</p> <p>The Abshyr -Sai River (not to be confused with the Abshyr-Ata waterfall), and the past tributary of the Kara-Darya River, begins at the northern slope of the Kichi-Alay Range. The length is 62 km, the main source is melted snow and rain water, it flows along the bottom of the canyon, where, at the very edge of the gorge, the Abshyr-Ata waterfall flows into it.</p> <p>A few kilometers south of the village of Kok-Zhar or 20 km south of the Abshyr -Ata waterfall, there are rock paintings on a separate rock, which the researchers designated as Abshyr-Sai rock paintings. On the rock there are drawings of horses, similar in style to the drawings of Dauyan horses in Aravan and other areas of the Nookat district. They differ only in small sizes.</p>
<p>The current situation in the tourism market</p>	<p>Abshyr-Ata is a unique natural site popular among the Kyrgyz people, attracting attention with its unusual waterfall and mazars. But unlike Arstanbap (Arslanbob), Abshyr-Ata was not promoted during the Soviet period. In Soviet times, a Pioneer camp was located near the waterfall, there was a summer tea house. Abshyr-Ata then had more sacredness than now.</p> <p>Abshyr-Ata has a untapped tourism potential. Today, Abshyr-Ata is chaotically developing in only two formats: an unusual waterfall and a sacred place. The entire area in front of the waterfall (we are talking about a narrow road in a narrow canyon)</p>

	<p>is densely built up with ugly tents, even rocks near the waterfall and vice versa are built up with metal yurts, which disfigures the general view of the waterfall and the gorge. In Soviet and post-Soviet times trade was allowed only at the tea house, the territory near the waterfall was free from trade. The cars stopped at the chaikhana, now right by the waterfall. Such chaos and disorder is unlikely to interest tourists, both internal and external.</p> <p>Abshyr-Ata does not have a permanent transport connection. There are no regular tours either. Tourist trips to Abshyr-Ata are unorganized. Many visitors come from Uzbekistan.</p> <p>There are several sacred places in the Abshyr-Ata gorge. In addition to the waterfall itself, there is Syrduu-Tash, Shypaa-Bulak (probably earlier called Kotur-Bulak) and a huge cave. On the hillock to the waterfall there is a mazar, which is associated with the holy prophet Idris.</p> <p>The infrastructure in Abshyr-Ata requires investments and renovation. Many buildings are chaotic. The waterfall and pond are fenced off. The system of garbage disposal, toilets is not thought out. The road is unpaved. No parking.</p>
Analysis of today's competitive situation	<p>Abshyr-Ata is a unique natural site with a unique waterfall and mazars. Local travel agencies are not particularly interested in organizing specialized tours.</p> <p>In terms of content (the sacredness of history), the object has no competitors, because it combines a unique natural monument with a waterfall (flowing out of nowhere) and mazars with biblical stories. In general, the whole of Kyrgyzstan is dotted with places that send us back to early Christian history, when part of the Eastern Christians was forced to leave the Middle East and Asia Minor in search of protection and security. It is quite possible to assume that the legends around the mazars and these stories may have common roots. Other nearest waterfalls to the city of Osh are at a decent distance. But they do not have a rich history with sacred elements.</p>
Description of the new product	<p>The Abshyr-Ata waterfall must be clearly marked on banners with all locations and distances. It is important to update information on Google Map , Yandex Map, 2 GIS.</p> <p>Abshyr-Ata is the gateway to the picturesque valley of the Kichi-Alay Range. One can offer new walking tours, starting from the waterfall and further along the canyon towards the ridge.</p> <p>Abshyr-Ata is of great importance for the inhabitants of the Ferghana Valley, its mazars have long enjoyed well-deserved fame and history. It is possible to develop pilgrimage, educational, historical, cultural, and religious tourism.</p> <p>Abshyr-Ata and the canyon were the filming locations for the famous Soviet westerns, so called easterns. Gennady Bazarov and Tolomush Okeyev shot their films here. In 1971, a part of the film “Bow to the Fire”, dedicated to the first woman chairman of the collective farm, Urkuya Saliyeva, was shot here. For fans of cinema and adventure tourism, specialized tours can also be organized.</p> <p>As said, the cave near the waterfall was often the subject of filming, for example, “Bow the Fire”, that is, based on these films, one can arrange adventure tours, with trips to memorable places, to artisans who make knives, various adventure festivals and events for the accuracy of throwing knives and so on.</p> <p>Abshyr-Sai can develop hiking (hiking), adventure and pilgrimage tourism. This direction will be attractive for family and group tours. Horseback riding tours can also be organized here.</p>
Increasing profitability	<p>Permanent transport connection is required. Development of the area as an attractive tourist site with a special sacred history. Profitability may come with organized tourism. It is necessary to determine the owners of the parking lot, places for</p>

	cooking, renting space. In Soviet times, there was a chaikhana, which was in harmony with the natural landscape. For those who make the pilgrimage, it is also necessary a place to perform rituals.
Women involvement	<p>There are active women's groups in the regions, in particular the Women's Peace Bank, which involves women in active work in the regions, it is necessary to involve them in order to employ women, to involve them in the tourism sector.</p> <p>In Nookat, as in the village of Cholok (Chui district), there is a tradition of making zhupka, this tradition is different from others, one can start making <i>zhupka</i> and <i>kurut</i>.</p> <p>One could establish a Nookat Zhupka and Kurut center (the latter is a drink made in Nookat, grated <i>suzmo</i> with fried flour, such a kurut is only prepared in Nookat and some areas of Batken district. In Alay district, of ezme kurut is made from large kuruts with the addition of hot water, that is, a slightly different technology).</p>
Youth involvement	Youth can be involved in the organization of tours through public youth organizations that have begun to practice trekking tours in Nookat.

ALAY	
Cluster 3 “Ethnotourism in Alay”	<p>The cluster covers the territories of Alay and Kara-Suu districts, along the Pamir Highway (Osh-Sary-Tash up to the Taldyk pass). Despite the transport proximity to the city of Osh, the cluster has some autonomy, which is expressed in the possibility of organizing multi-day tours with an overnight stay in yurt camps.</p> <p>It is important to focus the cluster on the development of ethnographic tourism, which introduces tourists to the life and traditions of mountain nomads. Historically, the territory of the cluster was the center of residence of the Alay Kyrgyz, who controlled vast areas of land, including the foothill part of the Fergana Valley. The most famous leaders of the Alay Kyrgyz were Alymbek Datka and his wife Kurmanjan-Datka.</p> <p>Alay district is the closest mountainous region in distance to Osh city with a rich history, flora and fauna, and has a huge tourism potential. Unlike Chong- Alay and Alaykuu, the Alay Valley is closer to Osh, has a permanent safe transport connection, as well as all the conditions for the development of tourism in any format and direction, especially for holding ethno-festivals and other public events.</p>
The current situation in the tourism market	<p>The dominant of the cluster is the district center Gulcha village, which has a network of guest houses, cafe-restaurants, as well as a museum dedicated to the activities of the "Alay Queen" Kurmanjan-Datka.</p> <p>Alay Valley is a popular route among tourists. But most often tourists are limited to visiting the Chiyirchik pass and the Sary-Oy gorge. The Chiyirchik pass is a popular place of rest among the Osh people in winter. The pass has great potential in the development of mass winter tourism, which can attract tourists from other countries, in particular from Uzbekistan.</p> <p>The entire Alay district has all the opportunities for tourism development.</p>
Analysis of today's competitive situation	<p>The center of attraction for tourists are two locations - the Sary-Oy valley/gorge along the Pamir Highway (on the segment Osh-Sary-Tash) and the Chiyirchik pass. The mountain valleys have the potential to promote ethnographic tourism based on the construction of yurt camps with expanded infrastructure for organizing weekend tours, ethnographic festivals, agritourism festivals, trekking, hiking, camping, glamping.</p> <p>At the Chiyirchik pass (40 km south of Osh), in addition to summer yurt towns, a ski base with minimal amenities operates with the onset of winter. This is the only</p>

	<p>location that functions in winter. In fact, it is the only location for the development of mass winter tourism in the Osh Region. It has great potential, unlike the location on the western outskirts of Osh towards the Papan reservoir. The Chyiyrychik pass is located at an altitude of 2400 meters, which allows the development of high-quality winter recreation.</p> <p>In the summer, the pass is a natural venue for ethnic festivals and other public events. It is a natural gateway to the Alay high-altitude valley and the beginning of the Pamir-Alay mountains.</p>
Description of the new product	<p>At the Chyiyrychik pass, regular winter and summer tourism festivals can be organized, focused on the synthesis of sedentary and mountain nomadic culture. The Chyiyrychik pass can be designated as a gateway to the Ferghana Valley in the Pamir-Alay mountains. One can install appropriate signs there with the names of cities and countries, indicating distances. This place will be the “zero kilometer” of Pamir-Alay.</p> <p>These lands need a regular ethnic festival in the summer with a demonstration of the culture of the Pamir-Alay mountain nomads, a yurt town with a city of artisans, functioning in winter and summer. The old city-fortress on the pass with sites for camping, parking.</p> <p>Regular music festival of music and culture of mountain nomads in the open air can also be organized. For example , #AlayTengriMusic #AlayNomadMusic.</p> <p>In promotion, it is necessary to emphasize that we are talking about the product and culture of mountain nomads, which differ from the life, traditions and history of the steppe nomads.</p>
Increasing profitability	<p>Alay district has a good potential for the development of all formats of tourism. But due to weak infrastructure, lack of conditions, advertising, tourism development strategy and planning are not fully developed. The district has the potential for both domestic and inbound tourism. Its advantageous location along the international Pamir Highway distinguishes it from other locations.</p>
Women involvement	<p>Women, girls can be involved in IT promotion of tourist products, into handicrafts, into the production of national dairy products and the cuisine of mountain nomads, the development and support of handicrafts.</p>
Youth involvement	<p>Youth can be involved in the development of author's local tours and guides.</p>

ALAYKUU	
Cluster 5 “Alaykuu Sky Valley”	<p>Geographically, the cluster covers the territory of Kara-Kulja and Alay districts of Osh province. According to regional tour operators, the Alaykuu Valley is one of the destinations with untapped and underestimated tourism potential. This is largely due to its geographical remoteness from Osh.</p> <p>Alaykuu or the Alaykuu basin is located between the Fergana and Alaykuu ranges at an altitude of 2500-3000 meters above sea level. The rivers Kok-Art, Sabazhardy, Kaiyandy, Terek and Chychyrganak flow in the valley, there are glaciers with a total area of 57.7 square meters, lakes Kulun and Kaiyandy. Alaykuu lives off sheep, yak and horse breeding. Alaykuu is famous for its famous koumiss, which is very different in taste from koumiss in other regions.</p> <p>The only road Kara-Kulja - Kok-Art leads to Alaykuu. One of the branches of the Silk Road passed along this road in ancient times. In the area of Ynkur above Ak-</p>

	Beyit there is an ancient Uyghur written monument. In addition, there are legends about hunting of Manas viziers led by Bakai in these places.
The current situation in the tourism market	<p>Alaykuu is famous for its dairy products and other natural and sustainable products. The Alaykuu brand in the Osh Region has become synonymous with a quality product. In Bishkek, this brand is practically unknown, although products under this brand are available in local hypermarkets.</p> <p>Local firms under the Alaykuu brand offer national drinks according to recipes common in the south of the country. The koumiss ethno-festival “AlaykuuFest” was regularly held in the valley, the last time such a festival was held in the village of Sai-Talaa in 2019.</p> <p>The representation of the location in social media is zero and rather seasonal, depending on the events. The last update was in 2019 when the koumiss festival was held.</p>
Analysis of today's competitive situation	<p>The development of this cluster can be based on the model used in the Sary-Mogol destination. The village of Sai-Talaa, where the innovative eco-farm Alaykuu operates, with a total area of 2 hectares at an altitude of 2100 meters above sea level, can become the dominant of the cluster. On the territory of the complex there is a guest house with a number of rooms that can accommodate up to 20 people, as well as 4 yurts, including one yurts in the form of a coworking office. The guest house has all the necessary amenities in the form of heating, electricity, sewerage and hot water. The eco-farm has a mini-dairy shop, where national drinks are produced for customers.</p> <p>For the development of the eco-farm, the experience of the Reina-Kench eco-farm in Issyk-Kul province can be used.</p>
Description of the new product	<p>The cluster can combine elements of ecological tourism and ethnographic tourism. Its potential tourism products include the organization of trekking, hiking and horse riding tours, jailoo tourism, and ethnic festivals. Given the low level of anthropogenic impact on nature, it is possible to organize a geological park in the future.</p> <p>Instead of the AlaykuuFest eco-festival, we offer to organize thematic tours. Mass eco-festivals are not recommended to be held there in order to preserve the unique natural conditions. It is important to develop regular events throughout the year. We recommend holding the AlaykuuFest festival in another location.</p>
Increasing profitability	The Alaykuu brand is not promoted on a national scale. The Alaykuu brand is often overshadowed by the larger Alay brand due to similar names and locations. Alaykuu has its own uniqueness, which is important to reveal. Alaykuu Sky Valley can become a quality holiday destination that is completely environmentally oriented, starting with the organization of the tour, content and food. It is important that everything is thought out to the smallest detail in terms of the "green economy" in addition to branding. This type of recreation may be of interest to wealthy tourists from neighboring Uzbekistan, ecotourism enthusiasts from Europe and other countries.
Women involvement	Women, girls can be involved in IT promotion of a tourist product, in handicrafts, in the production of national dairy products and in the cuisine of mountain nomads.
Youth involvement	Youth can be involved in the development of author's local tours and guides.

DULDUL-AT	
Cluster 4. “Sacred places of Osh province”	<p>Duldul-At area is situated 27 km west of Osh city, in the eastern part of the district center Aravan, located on the territory of the rural administration of Anarov. The complex includes a mausoleum, a childekana and a spring.</p> <p>The monument itself is a stone ridge, a rock, on some surfaces of which are carved rock images of mountain goats, horses and wild animals. At the foot of the main part of the rock, a source and a burial venerated as the grave of saint Duldul-At and a mosque are located.</p> <p>At a height of about 15-16 m from the bottom of the cliff, there are drawings of mountain goats, deer, people made with chopping-off technique. Large images of two pairs of horses, most likely stallions and mares, stand out among them. Their figures are depicted very gracefully and clearly. The outlines of horses are scratched on the stone almost in the real size and painted with ochre substance, which for thousands of years has not lost its bright color. Despite the typicality of the image, the Dauyan horses are stylistically very different from other images. They are made with great skill and precise knowledge of the characteristics of animals: with beautifully shaped body, long slender legs, with a strong croup. And their particular distinction is a small graceful head on a long-curved neck.</p> <p>The unique historical monument, which had no analogues, gradually turned into a revered holy place, which began to be called Duldul-Ata, adding an extra letter. According to the legend, this was the name of the legendary horse Hazret Ali, whose places of veneration are scattered throughout the Fergana Valley. For example, another such revered place is in Kadamjay, Batken province. There, by the road on the bank of the Shakhimardan River, there is a complex dedicated to Hazret Ali.</p> <p>Another mysterious cult is associated with a deep cleft located a few meters to the right of the rock paintings of the “heavenly horses”. Inside, between huge basalt boulders on a circular platform, one can see a stone artifact that is reminiscent of the ancient Aryan lingam cult, the ancient name for a symbol of divine productive power.</p> <p>Chil-Ustun – karst caves in the north-western part of the Osh Region, located about 3 km east of Aravan, at an altitude of 1,100 meters. The cave consists of three different sized halls, interconnected by corridors. The total length of the cave is 400 meters. The halls of the cave have a fairly large area and are dotted with numerous stalactites and stalagmites, which according to some estimates are up to 350 million years old.</p>
The current situation in the tourism market	<p>The Duldul-At area is in the same position as the Abshyr-Ata waterfall. The area is being built up, there is a chaotic visitation, which can damage the unique historical monument in the open air.</p> <p>There is a process of creating new legends and stories around the cults, whose true history is now lost without a trace. A small mosque with links to Hazret Ali is active. There are many places of worship associated with his name in the Fergana Valley. It is possible to prepare separate pilgrimage tour to the places related to Hazret Ali.</p> <p>In the Chil-Ustun cave there is unauthorized free access for all comers. Specialized firms from Bishkek organize special tours to the cave.</p>
Analysis of today's competitive situation	<p>The Duldul-At area and the Chil-Ustun cave need protection and popularization to develop a specific direction in tourism. It can be pilgrimage tourism, for history lovers and for fans of ethnographic tourism.</p> <p>There is a mosque in the area, which is actively visited. The locals hold various rituals. But the history of the monument itself is gradually being lost. Few people mention the Kingdom of Dauyan. Historians and archaeologists raise the question of the preservation of this unique historical monument.</p>

Description of the new product	<p>Duldul-At, Chil-Ustun must be clearly marked on banners with all locations and distances. It is important to update information on Google Map , Yandex Map, 2 GIS.</p> <p>It would be prudent to offer tours combining the visitation with other locations related to the cult of Hazret Ali in the Ferghana Valley. An ethno-cuisine center “Duldul-At” was opened in Aravan, where different types of barbecue and pilaf are prepared in an open area. Aravan is traditionally famous in the region for its kebabs and pilaf made from local rice. It is also home to the southern fig, which grows in abundance in local gardens. Pilgrimage, historical and cultural tourism can be associated with gastronomic tourism.</p> <p>In Soviet times, Aravan was traditionally represented as a “cotton land”, adding a cotton flower to the logos. We propose to actively promote the cult of Dauyan “heavenly horses”.</p>
Increasing profitability	<p>It is necessary to develop a virtual tour of all rock paintings to facilitate their viewing in the format of a special application or an Internet resource with a full description and an audio guide.</p> <p>In Soviet times and now, locally produced sweets, including halva, are sold in the bazaars of Aravan. One could offer sweets in the form of horses and foals. Such sweets can become an Aravan's brand. In Soviet times, in Arstanbap (Jalalabat province), the local bazaar sold bright local sweets made in the form of the inscription “Arslanbob”. They were very popular with buyers. Many people bought them as souvenirs. From dried figs and persimmons, which grow in abundance in Aravan, one could launch the production of sets in the form of horses.</p> <p>In the south of the country Aravan is clearly identified with delicious cuisine, one could combine pilgrimage tourism with cuisine by opening a huge ethnographic gastronomic center in the center of Aravan like in Tashkent (like a pilaf center).</p>
Women involvement	<p>Women can be involved in the preparation of sweets in the form of horses and foals. It would be logical to study the experience of other locations and countries where such sweets are prepared. To increase profitability, it is necessary to make only figurines of horses with a description and logo designed for Aravan.</p>
Youth involvement	<p>Youth can be involved in the development of author's local tours and guides.</p>

KARA-SHORO	
Cluster 1. “Silk Road Cities”	<p>The cluster covers three cities of Osh, Kara- Suu and Uzgen, united by a common trade history on the Silk Road. The cluster includes large urban settlements of the Osh Region with a rich cultural and historical heritage, bright rich oriental cuisine and preserved historical and architectural monuments. The cluster is focused on educational tourism.</p> <p>The deposit of carbonic waters "Kara- Shoro" is located 80 km east of the regional center Uzgen in the center of the local valley of the same name. The water deposit was opened in 1945. The composition of the waters of Kara- Shoro refers to carbonic chloride-hydrocarbonate sodium with a mineralization of 2.4-3.1 g/l and carbonic chloride-hydrocarbonate sodium with a mineralization from 5.3 (well No. 5) to 15 g/l. Water from well No. 5 was used as medicinal table water, and in Soviet times it was bottled for a short time.</p> <p>The mineral deposit is located on the territory of the state natural park of the same name. It was established in accordance with the Decree of the Government of the Kyrgyz Republic dated August 2, 1996 No. 353. The total area of the national park</p>

	<p>is 8450 hectares, of which 823.2 hectares are forest lands and 7626.8 hectares are non-forest lands.</p> <p>The natural park is located at the junction of the Tien Shan and Pamir-Alay. The Kara- Shoro River flows through the center of the park, flowing to the west and having numerous tributaries. The most significant of these tributaries are Kachyraly, Kara-Bulak, Balam- Kaldy, Chong-Kulubek, Chon- Tuyba, Chytty.</p>
The current situation in the tourism market	Kara- Shoro is popular among the local population. In the recreational zone of the national park, a yurt camp for tourists with amenities has been organized. Local residents in an unorganized form sell mineral water at local bazaars, pouring it into plastic dishes. Picnics are held in the park mainly in the summer. The Salam-Alik tourist center is located in the same zone. In Soviet times, there were two Pioneer camps and a tourist base for active and passive recreation on this territory.
Analysis of today's competitive situation	In Kara-Shoro, it is possible to develop medical and health tourism using active and passive recreation. Literally half an hour away from the suffocating heat of the valley, the tourist finds himself in the coolness of the foothill and mountain valleys. At the moment, the area is used exclusively as a picnic area, it is necessary to expand the branding of the area.
Description of the new product	<p>One could organize the collection and sale of medicinal herbs; another – open a chaikhana to sell tea from medicinal herbs, with local sweets for tea.</p> <p>A large part of the tourism products can be oriented towards traditional medicine. Also, taking into account the interests and needs of the tourist, it is possible to organize one-two-day tours to the Kara-Shoro national parks for active (trekking, camping, hiking) and passive recreation (jailoo tourism, overnight stay in yurts, acquaintance with the life of mountain nomads, agrotourism).</p>
Increasing profitability	Profitability can be increased owing to the orientation of the tourist flow to traditional medicine, mineral springs. Within a radius of 100 km from Osh city there are no other sources of mineral water with high mineralization and medical indicators, confirmed by the Institute of Balneology. Kara-Shoro has the potential of becoming a medical tourism center in the Osh Region.
Women involvement	Women may be involved in handicrafts, collection and sale of medicinal herbs.
Youth involvement	Youth can be involved in the development of author's local tours and guides.

RICE MILL IN UZGEN	
Cluster 1 “Silk Road Cities”	<p>Uzgen rice is a gastronomic brand familiar to many in Central Asia and beyond. But in recent years, under the onslaught of the "Tashkent laser" in local chaikhanas, there has been a gradual reduction in the consumption of Uzgen rice. Along with the spread of the so-called “Tashkent pilaf”, the sowings of relic Uzgen rice are reduced. The famous Uzgen rice pilaf is on the verge of extinction, followed by local chaikhanas.</p> <p>Uzgen district can be considered as a single cluster of Uzgen rice, which can include an old rice mill, an old bazaar in the center of Uzgen, and local chaikhanas.</p> <p>Uzgen rice devzira. The name of the variety is translated from Farsi as "wonderful grain". "Zira" is a grain. The word "dev" or "div" meant spirits, both evil and good (like goblin, mermaids in Slavic mythology). With the spread of Islam, the word acquired a negative connotation and began to denote exclusively evil spirits.</p>

	The “Devzira” was brought in by settlers from China, but this variety has not been grown in China itself for a long time. Once rice "Devzira" was called "Pink Pearl of the East". Its distinguishing feature is the dark strip that runs along the entire grain of rice, which remains on it during and after cooking, and is also a testament to the authenticity of the rice. For a special sweetish taste, this rice was considered festive. In Iran, under the Samanid dynasty, by a special Shah's decree, brown rice pilaf was allowed to be cooked only on special occasions.
The current situation in the tourism market	Rice Mill on Orom Street is an old wooden mill where reddish-brown relic Uzgen rice is processed according to ancient technology. It is a popular location among local tourist firms and guides and is often included as a supplement to a tour around Osh. Nevertheless, there is no practice of organizing regular tours, no conditions for receiving tourists, no information. Despite the relatively successful promotion, there are practically no photos and videos of the destination.
Analysis of today's competitive situation	There is no other such unique rice mill. The object has no competitors. The mill needs more tourist advertising, and renovation.
Description of the new product	<p>Several videos revealing the history and uniqueness of the mill need to be shot in several languages; materials should be uploaded to the Internet. This requires a special site dedicated to Uzgen Rice, where there will be information about the mill. It is important that the owners understand that the mill is old and needs to be protected and preserved.</p> <p>In autumn, one could organize a festival of gathering rice and cooking pilaf. It is important to encourage the cultivation of relic Uzgen rice. Upload to Google Map, Yandex Map, 2GIS local chaikhanas, which are famous for making pilaf from local varieties of Uzgen rice. Encourage research on the history of Uzgen rice (pilaf) to substantiate the origin of local varieties of rice.</p>
Increasing profitability	Supporting the cultivation, sale and consumption of local varieties of rice against the backdrop of the expansion of "foreign" varieties of rice stimulates local economies. We need systematic support at all stages from growing rice to cooking pilaf. The Internet is full of photos/videos of cooking pilaf from other varieties of rice. But there are no multimedia materials on Uzgen rice pilaf.
Women involvement	Women, girls can be involved in IT tourism product promotion.
Youth involvement	Youth can be involved in the development of author's local tours and guides.

OLD BAZAAR IN OSH	
Cluster 1 “Cities of the Silk Road”	<p>For Osh, the bazaars have always been more than just an area of a lively trade. They served as a kind of hub, connecting and uniting peoples and countries, cultures and languages, cuisines and habits, traditions and customs. This is especially evident in the gastronomic preferences of the Osh people and the design of courtyards and houses, where one can most clearly see the interweaving of cultures and traditions.</p> <p>In this regard, a special role should be given to the revival of the Old Bazaar in the center of the current market.</p>
The current situation in the tourism market	Today, the central market has grown strongly, especially after 2010. In our project, we are talking about its old part, where they used to sell rice, nuts, spices, where there is a handicraft row. Tourists are attracted by the history of the old bazaar, not

	modern container malls. Osh is attractive for tourists in three locations - the old bazaar, Sulaiman-Too and the cuisine. If the situation with Sulaiman-Too and the cuisine is more or less positive, whereas the old bazaar's story is in a deplorable state. Due to the stormy chaotic development, the bazaar has lost its tourist attraction, moreover, artisans and sellers of national goods are disappearing.
Analysis of today's competitive situation	Osh is unthinkable without the old bazaar, which is the heart of the city. As long as the city has existed, the old bazaar is just as old. It has not changed its location in all these years. So initiatives to move the old bazaar would only hasten its demise. In this connection, it would be easier to declare a moratorium on its expansion, move the container markets, and clear the embankment along the bazaar in order to revive the old bazaar in its former location in a narrow cleft on the bank of the Ak-Buura River on the left side.
Description of the new product	<p>The revival of the old quarters of the bazaar, starting with the arch (they sell cakes there now), including the handicraft rows. We are talking about the revival of the old quarters of the Osh bazaar, which can attract tourists, stimulate the development of small and medium-sized businesses, make the bazaar more attractive and understandable for visiting. On the site of the Timur-Palvan shopping center, one could open the Maida Manti Center following the example of the Pilaf Center in Tashkent. This is a symbolic place, because in the old days it was there women traded <i>maida manti</i>, which, along with pilaf, is the gastronomic brand of Osh city.</p> <p>In place of the old inscription "Peace to the World", one could install a banner with locations and the history of the bazaar. In the revival of the old part of the market, it is important to take into account the style, architecture of the old bazaar based on archival photos and film frames that are in the archive in the public domain.</p> <p>In this way, the part of the old bazaar being revived will consist of the former central entrance (there are brick gates made of silicate bricks) to the former caravanserai, from there to the craft rows. The revival does not require capital construction, it is necessary to remove unnecessary containers, clear the entrances, renovate the old shopping areas, allow trade only in food, dried fruits, spices, as it was before 2010.</p>
Increasing profitability	Profitability will increase even at the expense of tourists. The reconstruction and preservation of the old bazaar will not affect the overall profitability of the market, as it does not affect its activities, with the exception of the dismantling of excess containers. The construction of the Maida Manti Center will only stimulate the development of small and medium-sized businesses. The revival of the old quarters in the bazaar will stimulate the development of forgotten and disappearing crafts.
Women involvement	Women may be involved in handicrafts. The maida manti center, by tradition, may become a gastronomic center where women and their families are involved.
Youth involvement	Youth can be involved in the development of author's local tours and guides.

3.4. Recommendations on communications policy

For the sustainable development of the tourism industry in the Osh region, the project consultant has developed recommendations for communication campaigns, which, for example, may be required when organizing regional tourism events. In order to systematize the recommendations, it is advisable to divide information and communication resources into several segments.

One of the most effective classic channels for conducting communication campaigns are **Internet sites of tourist orientation**. In the Kyrgyz segment of the World Wide Web, there are very few high-quality tourist sites that would reflect the diversity of the country. The websites of most travel companies do not have regular updates; many texts are duplicated and not designed to attract tourists. They often use photographs of non-native nature as illustrative material, such cases become the subject of criticism and trolling among social media users. There is no possibility of feedback on the sites; contact information is not up-to-date. Many such sites do not have an English version.

Pages, accounts, groups, social media channels related to such tourist sites and companies are poorly administered, not updated, and do not have a clear editorial policy. Most of these resources, with the rare exception of a few groups administered by industry professionals, publish information that has nothing to do with the tourism industry.

To attract an audience and expand business, we would recommend tour operators and destination owners to use sites such as <https://incredibleosh.kg/>. They contain a lot of useful information about the history, culture, cuisine of certain locations. Such resources help attract tourists through their unique content, which many tourist sites do not have. Interaction with the authors of such sites creates a wide scope for new projects and undertakings.



The activities of bloggers are becoming increasingly popular in the promotion of tourist destinations. This can be top authors, focused on the promotion of tourist content, for example, the Russian blogger I. Varlamov (his channel on YouTube has more than 4 million subscribers), Kyrgyz travel blogger Meder Myrzaev. In addition, it makes sense to look at food bloggers who specialize in street food in different countries and national cuisine. Depending on the budget, goals and scale of the events, one can involve bloggers of all types and levels. Travel and food bloggers play an important role in the popularization of destinations, today they compete with the big media. In the Kyrgyz Republic, travel blogging is growing in popularity as a separate direction in the tourism sector.



When organizing events, especially large ones such as SILK ROAD EXPO, SILK ROAD FORUM, SILK ROAD FOODS, we would recommend, along with social media, to use the capabilities of **traditional media**, covering events on a national scale or showing a separate interest in the coverage of tourism events. Such resources can be television and radio companies and online publications (in the KR print media are not popular, they constitute a small segment of the media market, including glossy tourism publications). An important step in this direction could be the establishment of cooperation with the National Television and Radio Broadcasting Company, regional television and radio companies in Osh. This will help to increase the interaction between stakeholders and draw more attention to the events.

When organizing video shootings, we recommend taking advantage of the opportunities of regional TV and radio companies that can become information partners of the events. Journalists and videographers can take part in the organization of filming, editing and posting. Such cooperation at the regional level will help to solve many technical and financial issues. Media production can be duplicated on channels, pages and groups of regional traditional media. It is recommended to establish cooperation with editors and journalists, involving them in joint work, starting from the early stages of event organization.

Road tour "Bazaar", festivals of hunting in Alaykuu, nomadism in Sary-Oy, water in Kara-Shoro, Too Fest in Chong-Alay, spiritual culture in Abshyr-Ata and Duldul-At are events of specific tourist orientation. They can be interesting and attract the attention of amateurs, enthusiasts, tour operators, bloggers and ordinary travelers. For the mentioned events the consultant would recommend to use the possibilities of **social media**, messengers and specialized information resources, including bloggers.

* * *

We think it is appropriate to dwell separately on social media. They are divided into several types, each of which can be useful to actors in the tourism sector in its own way. They are divided into several types, each of which can be useful in its own way for actors in the tourism sector.

- a) The first group includes *communicative social media*, which bring users together for communication, this can be forums with reviews. For example, Facebook, Odnoklassniki.
- b) The second group is *load social media*, in which one needs to upload information, and then constantly edit it. The most common platform is Wikipedia, which, despite some skepticism about its content, is popular for finding information on locations.
- c) The third group is *social platforms*, where any type of information is exchanged, more often video, photos, audio and less often texts. For example, YouTube, Tik-Tok, Instagram, Flickr.

When organizing practical work with social media, it is recommended to proceed from the following considerations:

First, before choosing a social media for a communication campaign, it is necessary to answer several questions: *for whom, why are we doing this; why and how we do it; when we do it*. Format, language, design and color are of great importance. One should not refuse to use game elements, especially when it comes to the tourism sector, where zest, presentation and format are important. Even the most unique destination needs a bright, memorable and effective communication campaign. There are several important features that make social media an effective platform for communication campaigns, namely:

- ❖ *Openness*. Social media users openly share personal information, age, photos, gender. This information can help you target targeted ads.
- ❖ *Communication*. Social media helps build communication, establish feedback; users are united in groups and chats according to their interests; subscribe to other users and pages, communicate and even implement joint projects together.
- ❖ *Free distribution*. Content in social media is available for free distribution, there is no system of prior approval and editing, unlike traditional media.
- ❖ *Reputation*. This is a unique opportunity to build your reputation with the help of the audience, attracting more subscribers and readers.
- ❖ *Free use*. Easy registration and convenient administration system. The power of social media allows for shared administration with different levels of responsibility. We advise you to make the most of the opportunities provided by social platforms.

In particular, Meta allows administering, customizing and managing content on Facebook, Instagram and WhatsApp through one account. Google provides the same capabilities when working with various associated applications, for example, with the same use of the super popular YouTube. It would also be recommended using email rather than cell phone numbers for registration and administration of social media. It is also important to include two-factor identification and use password managers.

Secondly, when making the choice of social media, it is advised to place maximum emphasis on using *the capabilities of the following platforms*:

- *YouTube* is the most popular video hosting on the Internet. It is very popular among travel and food bloggers. Channels of these bloggers enjoy the same, if not greater popularity, as the channels of major travel companies.
- *Vimeo* is a kind of alternative to YouTube, but with better content. It is very popular among the English-speaking audience.
- *Tik Tok* is a dynamically developing platform with short videos.
- *Instagram* is a popular social media with interesting multimedia content. Over the past few years, successful insta bloggers, also known as "digital content creators" who specialize in tourism topics, have appeared in Kyrgyzstan. Almost all of them produce high-quality multimedia content based on their own equipment, including shooting with drones.
- *Flickr* is a popular platform among photographers for creating, distributing and archiving multimedia content. Not all content is usually published on Facebook, Instagram or websites while shooting events. Flickr allows creating voluminous albums, that is, to archive content. The platform is very popular with the English-speaking audience.

For more effective use of social media capabilities, we would recommend conducting trainings in the format of a specially designed program for the tourism sector, divided by directions. The analysis of existing pages, channels, sub-pages and groups of tourism orientation in the Kyrgyz segment of social media demonstrates the need for such training.

At the same time, it is important to understand that the trust of the audience, positive customer reviews, instant response to negative reviews, exact addresses of locations with relevant designations and photographs are of great importance for the development of the tourism industry. It is important already at the initial stages of the communication campaign to *clarify, double-check all locations on popular services* that provide mapping services.

- ✓ *Foursquare* is a geolocation social platform that allows users to leave comments and mark locations that they liked.
- ✓ *2 GIS* – virtual maps with specific designations, free of charge for users. The platform actively cooperates with the actors of the tourism sector.
- ✓ *Yandex.Maps* is a search, information mapping service of Yandex. It is popular among users from Russia, Kazakhstan, largely due to the Yandex Taxi service.
- ✓ *Google Maps go* is a new application with navigation support, which is a light version of the standard Google Maps; it is popular among the English-speaking audience.
- ✓ *TripAdvisor* - a social platform for travelers, tourists, where they can leave their reviews, impressions about trips; in addition, there is information on tours, recommendations on tourist sites and hotels.

And thirdly, it is always important to consider that promotion in social media has its own *specifics and specialized tools*. Among the obvious advantages of working with social media are their lower cost in terms of finance, the ability to target advertising and self-administer the advertising campaign without intermediaries.

First of all it concerns *targeted advertising*. It includes video content and banner ads. The most important advantages of targeted advertising are its quick effect, low costs and the ability to tune in to a specific audience. Targeted ads are easy to set up. On social platforms, certain restrictions and rules apply only to political advertising campaigns and information campaigns funded by government organizations. Good opportunities for working with targeted contextual advertising are provided, for example, by Google Ads. In addition, there are individual companies in Kyrgyzstan that provide specialized services for targeted advertising.

The second group of tools includes *Social media marketing (SMM)*, that is maintaining pages, channels, groups and publics. It also involves conducting various collaborations with partner resources, organizing contests, events in online and offline formats, advertising posts with promotions and specific offers, interacting with users, working with keywords, including hashtags.

The table below provides links to information resources, including those in social media and messengers, which may be useful in organizing communication campaigns by actors of the Osh Region's tourism sector.

Events	Social media ²⁵	YouTube channels ²⁶	Bloggers-Influencers ²⁷	Various Internet sites ²⁸	Traditional media ²⁹
SILK ROAD EXPO	https://t.me/pazl_ashar_group Puzzle - ashar tourism” Telegram group; https://t.me/tourizmkkg Tourism Development Group in Kyrgyzstan; https://www.facebook.com/groups/1239536232730473 Tourism Destination Development Group in Kyrgyzstan; https://www.facebook.com/groups/kyrgyzstanguides/media Group dedicated to the activities of guides in the Kyrgyz Republic; https://www.facebook.com/groups/tourstocentralasia/ Tours to Central Asia from Uzbekistan.	https://www.youtube.com/@kyrgyztourism2614/featured Channel of Kyrgyz Tourism, which promotes cultural and adventure tourism; https://www.youtube.com/channel/UCh6eekDBLkonoqWtj_npTHA Kyrgyz channel dedicated to culture, cuisine, history, tourism in Osh; https://www.youtube.com/@AdvTravTrade/about International Adventure Travel Trade Association.	https://www.instagram.com/gladkov_nikolai/ leading mobilographer, professional photo/video shooting, popular travel blogger; https://www.facebook.com/kana1517/about Kyrgyz videographer, author of digital content; https://t.me/ourosh “Мой Ош” telegram channel (available on Facebook & Instagram), authors of digital content; https://tourkg.com/ travel blog about Kyrgyzstan;	https://www.fundtourism.com/ru TDSF KR; https://tourism.gov.kg/ Department of Tourism; https://www.oshcity.kg/index.php/ru/ https://incredibleosh.kg a historical and cultural platform that promotes popular tourism, art activism, popularization of destinations in the Osh Region; https://silkroadexplore.com/ru/about travel agency from Kyrgyzstan; https://www.helvetas.org/ru/kyrgyzstan an independent organization from Switzerland that supports the development of tourism in communities.	https://www.akchabarr.kg/ leading private business online media in the Kyrgyz Republic; https://kaktus.media/ popular private online media, seasonally make selections for recreation and tourism; https://www.ktrk.kg/ National television and radio company; https://economist.kg/ private online media on financial and economic topics.

²⁵ “Social Media” section combines all social media (networks), instant messengers, a link to travel pages, accounts, groups, publics, channels.

²⁶ YouTube channels on tourism are highlighted in a separate section due to the attractiveness of video content.

²⁷ “Bloggers” section contains links to travel, food bloggers and other popular influencers (“opinion leaders”).

²⁸ “Various Sites” section shows links to sites related to tourism, as well as to resources of cultural, cultural-historical, and local history topics.

²⁹ “Traditional Media” provides links to traditional media that specialize in tourism coverage.

SILK ROAD FORUM	<p>https://t.me/pazl_ashar_group “Puzzle - ashara tourism” Telegram group;</p> <p>https://t.me/tourizmkg Tourism Development Group in Kyrgyzstan;</p> <p>https://www.facebook.com/groups/1239536232730473 Tourism Destination Development Group in Kyrgyzstan;</p> <p>https://www.facebook.com/groups/kyrgyzstanguides/media Group dedicated to the activities of guides in the Kyrgyz Republic;</p> <p>https://www.facebook.com/groups/tourstocentralasia/ Tours to Central Asia from Uzbekistan.</p>	<p>https://www.youtube.com/@kyrgyztourism2614/featured channel of Kyrgyz Tourism, which promotes cultural and adventure tourism;</p> <p>https://www.youtube.com/channel/UCH6eekDBLkonaqWtj_npTHA Kyrgyz channel dedicated to culture, cuisine, history, tourism in Osh;</p> <p>https://www.youtube.com/@AdvTravTrade/about International Adventure Travel Trade Association;</p>	<p>https://www.instagram.com/gladkov_nikolai/ leading mobilographer, professional photo/video shooting, popular travel blogger;</p> <p>https://www.facebook.com/kana1517/about Kyrgyz videographer, author of digital content;</p> <p>https://t.me/ourosh “Мой Ош” My Osh” telegram channel (available on FaceBook & Instagram), authors of digital content;</p> <p>https://tourkg.com/ travel blog about Kyrgyzstan.</p>	<p>https://www.fundtourism.com/ru TDSF KR;</p> <p>https://tourism.gov.kg/ Department of Tourism;</p> <p>https://www.oshcity.kg/index.php/ru/ Osh City Hall;</p> <p>https://incredibleosh.kg/ historical and cultural platform that promotes popular tourism, art activism, popularization of destinations in the Osh Region;</p> <p>https://silkroadexplore.com/ru/about Travel agency from Kyrgyzstan;</p> <p>https://www.helvetas.org/ru/kyrgyzstan is an independent organization from Switzerland that supports the development of tourism in communities.</p>	<p>https://www.akchabarr.kg/ leading business online media in the Kyrgyz Republic;</p> <p>https://kaktus.media/ popular private online media, seasonally make selections for recreation and tourism;</p> <p>https://www.ktrk.kg/ National television and radio company;</p> <p>https://www.ktrk.kg/ private online media on financial and economic topics.</p>
SILK ROAD FOODS	<p>https://t.me/pazl_ashar_group “Puzzle - ashara tourism” Telegram group;</p> <p>https://t.me/tourizmkg Tourism Development Group in Kyrgyzstan;</p> <p>https://www.facebook.com/groups/1239536232730473 Tourism Destination Development Group in Kyrgyzstan;</p> <p>https://www.facebook.com/groups/kyrgyzstanguides/media</p>	<p>https://www.youtube.com/@kyrgyztourism2614/featured channel of Kyrgyz Tourism, which promotes cultural and adventure tourism;</p> <p>https://www.youtube.com/channel/UCH6eekDBLkonaqWtj_npTHA Kyrgyz channel dedicated to culture, cuisine, history, tourism in Osh.</p>	<p>https://www.youtube.com/@elenakukele/featured Kazakh travel cooking channel ;</p> <p>https://www.youtube.com/@TKACHOV Russian food blogger specializing in street food in different parts of the world;</p> <p>https://www.instagram.com/adilet_nogoibayev/ food blogger, YouTube channel Kyrgyzstan online;</p> <p>https://www.instagram.com/meder.myrzaev/ author of digital content, traveller\ nature explorer, drone shooting;</p>	<p>https://www.fundtourism.com/ru TDSF KR;</p> <p>https://tourism.gov.kg/ Department of Tourism;</p> <p>https://www.oshcity.kg/index.php/ru/ Osh Mayor’s Office site;</p> <p>https://incredibleosh.kg/ historical and cultural platform that promotes popular tourism, art activism, popularization of destinations in the Osh Region;</p>	<p>https://www.akchabarr.kg/ leading private business online media in the Kyrgyz Republic;</p> <p>https://kaktus.media/ popular private online media, seasonally make selections for recreation and tourism;</p>

	<p>Group dedicated to the activities of guides in the Kyrgyz Republic;</p> <p>https://www.facebook.com/groups/tourstocentralasia/ Tours to Central Asia from Uzbekistan ;</p>		<p>https://www.instagram.com/gladkov_nikolai/ leading mobilographer, professional photo/video shooting, popular travel blogger;</p> <p>https://www.instagram.com/1.1studio/ production center 1.1. Studio collaborates with bloggers;</p> <p>https://www.facebook.com/kana1517/about Kyrgyz videographer, author of digital content;</p> <p>https://t.me/ourosh “Мой Ом” telegram channel (available on FaceBook & Instagram), authors of digital content;</p> <p>https://tourkg.com/ travel blog about Kyrgyzstan.</p>	<p>https://silkroadexplore.com/ru/about travel agency from Kyrgyzstan;</p> <p>https://www.helvetas.org/ru/kyrgyzstan is an independent organization from Switzerland that supports the development of tourism in communities.</p>	<p>https://kloop.kg/ private online media, multimedia longreads;</p> <p>https://www.ktrk.kg/ National television and radio company;</p> <p>https://economist.kg/ private online media on financial and economic topics.</p>
ROAD-TOUR BAZAR	<p>https://t.me/pazl_ashar_group “Puzzle - ashar tourism” Telegram group;</p> <p>https://www.facebook.com/groups/1239536232730473 Tourism Destination Development Group in Kyrgyzstan;</p> <p>https://www.facebook.com/groups/341490619353204 Central Asia tourism development group;</p> <p>https://www.facebook.com/groups/kyrgyzstanguides/media Group dedicated to the activities of guides in the Kyrgyz Republic.</p>	<p>https://www.youtube.com/channel/UC6eekDBLkonoqWtj_npTHA Kyrgyz channel dedicated to culture, cuisine, history, tourism in Osh;</p>	<p>https://www.backpackadventures.org/about-ellis/ Dutch anthropologist, cultural blogger;</p> <p>https://www.youtube.com/@TrueStoryTravel Russian travel blogger;</p> <p>https://www.youtube.com/@larabulina Russian travel blogger Larisa Bulina;</p> <p>https://www.youtube.com/@elenakukele/featured Kazakh travel cooking channel;</p> <p>https://www.youtube.com/@TKACHOV Russian food blogger specializing in street food in different parts of the world;</p> <p>https://www.instagram.com/adilet_nogoibae food blogger, YouTube channel Kyrgyzstan online;</p>	<p>https://www.fundtourism.com/ru TDSF KR;</p> <p>too.kg/ travel guide for the Kyrgyz Republic;</p> <p>incredibleosh.kg/ historical and cultural platform that promotes popular tourism, art activism, popularization of destinations in the region;</p> <p>kyrgyzstan-tourism.com/ resource of the company "Kyrgyz Tourism" in English, promoting cultural and adventure tourism;</p> <p>https://bestofosh.com/sightseeing-osh/ tourist resource in</p>	<p>https://kaktus.media/ popular private online media, seasonally make selections for recreation and tourism;</p> <p>https://kloop.kg/ private online media, feature multimedia longreads;</p> <p>https://t-media.kg/ leading private TV company in Osh;</p>

			https://www.instagram.com/meder.myrzaev/ digital content author, traveller\ nature explorer, drone photography; https://www.facebook.com/kana1517/about Kyrgyz videographer, author of digital content; https://t.me/ourosh “My Osh” telegram channel (available on FaceBook & Instagram), authors of digital content; https://www.instagram.com/1.1studio/ production center 1.1. Studio cooperates with bloggers.	English, author's tours around Osh; https://cbtkyrgyzstan.kg/cbt-osh/ KCBTA resource; https://destinationosh.com/en/ local travel company resource.	
HUNTING FESTIVAL ALAYKUU	https://t.me/pazl_ashar_group “Puzzle - ashara tourism” Telegram group; https://www.facebook.com/groups/1239536232730473 Tourism Destination Development Group in Kyrgyzstan; https://www.facebook.com/groups/341490619353204 Central Asia tourism development group; https://www.facebook.com/groups/kyrgyzstanguides/media Group dedicated to the activities of guides in the Kyrgyz Republic; https://www.facebook.com/groups/tourstocentralasia/ Tours to Central Asia from Uzbekistan ;	https://www.youtube.com/channel/UC6eekDBLk0naqWtj_npTHA Kyrgyz channel dedicated to culture, cuisine, history, tourism in Osh; https://www.youtube.com/@kyrgyzfriends resource of the Silk Road Culture and Tourism Development Project together with KOICA to promote tourism in villages; https://www.youtube.com/@AdvTravTrade/about International Adventure Travel Trade Association;	https://www.journalofnomads.com/ Belgian travel blogger, hiker; https://www.backpackadventures.org/about-ellis/ Dutch anthropologist, cultural blogger; https://www.youtube.com/@ptuxermann Anton Ptushkin Ukrainian travel blogger, professional photo\video shooting, drone; https://www.youtube.com/@TrueStoryTravel Russian travel blogger; https://www.youtube.com/@larabulina Russian travel blogger Larisa Bulina; https://www.instagram.com/azaakmatov26/ co-founder @ kettik.kg, @kettik.osh - graphic designer; https://www.instagram.com/meder.myrzaev/ digital content author, traveller\ nature explorer, drone photography; https://www.instagram.com/gladkov_nikolai/ leading mobilographer, professional	https://www.fundtourism.com/ru TDSF KR; https://too.kg/ tourist guide for Kyrgyzstan; https://incredibleosh.kg/ historical and cultural platform that promotes popular tourism, art activism, popularization of destinations in the Osh Region; https://kyrgyzstan-tourism.com/ resource of the tourist company "Kyrgyz Tourism" in English, promoting cultural and adventure tourism; https://cbtkyrgyzstan.kg/cbt-osh/ resource of the KCBTA; destinationosh.com/en/ local travel company resource.	https://kloop.kg/ private online media, feature multimedia longreads; https://t-media.kg/ leading private TV company in Osh.

		https://www.youtube.com/@kyrgyztourism2614/ featured channel company "Kyrgyz Tourism", which promotes cultural and adventure tourism.	<p>photo/video shooting, popular travel blogger;</p> <p>https://www.instagram.com/tynchtykmr/ digital content creator, travel blogger, tour organizer;</p> <p>https://www.instagram.com/ataeva_aiperi/ insta blogger;</p> <p>https://www.instagram.com/attokurovnm/ video blogger, traveller, tour organizer;</p> <p>https://www.facebook.com/kana1517/about Kyrgyz videographer, author of digital content;</p> <p>https://t.me/ourosh “Мой Ош” telegram channel (available on FaceBook & Instagram), authors of digital content;</p> <p>https://www.facebook.com/profile.php?id=100005150855922 Elina Magalimova, Kyrgyz travel blogger, professional photographer;</p> <p>https://www.facebook.com/tourist.kg/about tour organizer “Tourist.kg” Davran Osmonkulov.</p>		
	<p>https://t.me/pazl_ashar_group “Puzzle - ashar tourism” Telegram group;</p> <p>https://www.facebook.com/groups/1239536232730473 Tourism Destination Development Group in Kyrgyzstan;</p>	<p>https://www.youtube.com/channel/UCH6eekDBLkonaqWtj_npTHA Kyrgyz channel dedicated to culture, cuisine, history, tourism in Osh;</p> <p>https://www.youtube.com/@elenakukele/feature</p>	<p>https://www.journalofnomads.com/ Belgian travel blogger, hiker;</p> <p>https://www.backpackadventures.org/about-ellis/ Dutch anthropologist, cultural blogger;</p> <p>https://www.youtube.com/@ptuxermann Ukrainian travel blogger, professional photo/video shooting, drone;</p> <p>https://www.youtube.com/@larabulina Russian travel blogger Larisa Bulina;</p>	<p>https://www.fundtourism.com/ru TDSF KR;</p> <p>https://too.kg/ tourist guide for Kyrgyzstan;</p> <p>https://incredibleosh.kg/ historical and cultural platform that promotes popular tourism, art activism, popularization of destinations in the Osh Region;</p>	<p>https://kaktus.media/ popular private online media, seasonally make selections for recreation and tourism;</p> <p>https://kloop.kg/ private online media,</p>

<p style="text-align: center;">ALAY FEST</p>	<p>https://www.facebook.com/groups/341490619353204 Central Asia tourism development group;</p> <p>https://www.facebook.com/groups/kyrgyzstanguides/media Group dedicated to the activities of guides in the Kyrgyz Republic;</p> <p>https://www.facebook.com/groups/tourstocentralasia/ Tours to Central Asia from Uzbekistan ;</p>	<p>d Kazakh travel cooking channel ;</p> <p>https://www.youtube.com/@kyrgyzfriends resource of the Silk Road Culture and Tourism Development Project together with KOICA to promote tourism in villages.</p> <p>https://www.youtube.com/@AdvTravTrade/about International Adventure Travel Trade Association;</p> <p>https://www.youtube.com/@kyrgyztourism2614/featured channel company "Kyrgyz Tourism", which promotes cultural and adventure tourism.</p>	<p>https://www.instagram.com/azaakmatov26/ co-founder @kettik.kg, @kettik.osh, graphic designer;</p> <p>https://www.instagram.com/meder.myrzaev/ digital content author, traveller/nature explorer, drone photography;</p> <p>https://www.instagram.com/gladkov_nikolai/ leading mobilographer, professional photo/video shooting, popular travel blogger;</p> <p>https://www.instagram.com/tynchtykmr/ digital content creator, travel blogger, tour organizer;</p> <p>https://www.instagram.com/ataeva_aiperi/ insta blogger;</p> <p>https://www.instagram.com/attokurovnm/ video blogger, traveller, tour organizer;</p> <p>https://www.facebook.com/profile.php?id=100005150855922</p> <p>Elina Magalimova, Kyrgyz travel blogger, professional photographer;</p> <p>https://www.facebook.com/kana1517/about Kyrgyz videographer, author of digital content;</p> <p>https://t.me/ourosh “Мой Ош” telegram channel (available on FaceBook & Instagram), authors of digital content;</p> <p>https://www.facebook.com/tourist.kg/about tour organizer “ Tourist.kg” Davran Osmonkulov;</p>	<p>https://kyrgyzstan-tourism.com/ resource of the tourist company "Kyrgyz Tourism" in English, promoting cultural and adventure tourism;</p> <p>https://cbtkyrgyzstan.kg/cbt-osh/ resource of the Kyrgyz Community Based Tourism Association;</p> <p>destinationosh.com/en/ local travel company resource.</p>	<p>feature multimedia longreads;</p> <p>https://t-media.kg/ leading private TV company in Osh.</p>
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SPIRITUAL FESTIVALABSHYR-ATA	<p>Group dedicated to the activities of guides in the Kyrgyz Republic;</p> <p>https://www.facebook.com/groups/tourstocentralasia/ Tours to Central Asia from Uzbekistan ;</p>	<p>promote tourism in villages.</p>	<p>https://www.instagram.com/meder.myrzaev/ author of digital content, traveller\nature explorer, drone shooting;</p> <p>https://www.instagram.com/gladkov_nikolai/ leading mobilographer, professional photo/video shooting, popular travel blogger;</p> <p>https://www.facebook.com/profile.php?id=100005150855922 Elina Magalimova, Kyrgyz travel blogger, professional photographer;</p> <p>https://www.facebook.com/kana1517/about Kyrgyz videographer, author of digital content;</p> <p>https://t.me/ourosh “Мой Ош” telegram channel (available on FaceBook & Instagram), authors of digital content;</p> <p>https://www.instagram.com/tynchtykmr/ digital content creator, travel blogger, tour organizer.</p>	<p>English, promoting cultural and adventure tourism;</p> <p>https://bestofosh.com/sightseeing-osh/ resource in English, author's tours of Osh;</p> <p>https://cbtkyrgyzstan.kg/cbt-osh/ KATOS resource;</p> <p>destinationosh . com / en / resource of a local travel company;</p> <p>https://aigine.kg/ Aigine Cultural Research Center .</p>	
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SACRED ROAD TOUR HEAVENLY HORSES	<p>https://www.facebook.com/groups/341490619353204 Central Asia tourism development group;</p> <p>https://www.facebook.com/groups/kyrgyzstanguides/media Group dedicated to the activities of guides in the Kyrgyz Republic;</p>	<p>resource of the Silk Road Culture and Tourism Development Project together with KOICA to promote tourism in villages.</p>	<p>https://www.instagram.com/azaakmatov26/ co-founder @kettik.kg, @kettik.osh, graphic designer;</p> <p>https://www.instagram.com/meder.myrzaev/ author of digital content, traveller\ nature explorer, drone shooting;</p> <p>https://www.instagram.com/gladkov_nikolai/ leading mobilographer, professional photo/video shooting, popular travel blogger;</p> <p>https://www.facebook.com/profile.php?id=100005150855922 Elina Magalimova, Kyrgyz travel blogger, professional photographer;</p> <p>https://www.facebook.com/kana1517/about Kyrgyz videographer, author of digital content;</p> <p>https://t.me/ourosh “Мой Ом” telegram channel (available on Facebook&Instagram), authors of digital content;</p> <p>https://www.instagram.com/tynchtykmyr/ author of digital content, travel blogger, tour organizer.</p>	<p>kyrgyzstan-tourism.com/ resource of the tourist company "Kyrgyz Tourism" in English, promoting cultural and adventure tourism;</p> <p>https://bestofosh.com/sightseeing-osh/ resource in English, author's tours of Osh;</p> <p>destinationosh.com/en/ resource of a local travel company;</p> <p>https://cbtkyrgyzstan.kg/cbt-osh/ KCBTA;</p> <p>https://aigine.kg/ Aigine Cultural Research Center .</p>	
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<p style="text-align: center;">W A T E R F E S T I V A L K A R A S H O R O</p>	<p>https://www.facebook.com/groups/341490619353204 Central Asia tourism development group; https://www.facebook.com/groups/kyrgyzstanguides/media A group dedicated to the activities of guides in the Kyrgyz Republic</p>	<p>resource of the Silk Road Culture and Tourism Development Project together with KOICA to promote tourism in villages. https://www.youtube.com/@kyrgyztourism2614/featured channel company "Kyrgyz Tourism", which promotes cultural and adventure tourism.</p>	<p>https://www.instagram.com/1.1studio/ production center 1.1. Studio cooperates with bloggers.</p>	<p>art activism, popularization of destinations in the Osh region; https://kyrgyzstan-tourism.com/ resource of the travel company "Kyrgyz Tourism" in English language promoting cultural and adventure tourism; https://bestofosh.com/sightseeing-osh/ resource in English, author's tours of Osh; https://cbtkyrgyzstan.kg/cbt-osh/ KCBTA resource ; https://destinationosh.com/en/ - resource of a local travel company; https://aigine.kg/ Aigine Cultural Research Center</p>	
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3.5. 2023-2028 General Action Plan for the STDSP implementation

No. of problems	Main activities	Responsible parties from state and local governments	Co-executors from the private and civil sectors	Timing	Expected results
<p>VISION:</p> <p><u>BY 2028, THE OSH REGION WILL BECOME THE LEADING PROVIDER OF TOURIST SERVICES IN THE FERGHANA VALLEY AND THE PAMIR-ALAY HIGHWAY</u></p> <p>MAIN GOAL:</p> <p><u>INCREASING THE RECOGNITION OF THE OSH REGION IN THE GLOBAL TOURISM MARKET BY PROMOTING A REGIONAL BRAND AND CREATING A UNIQUE EXPERIENCE FOR TOURISTS FROM VISITING THE REGION</u></p> <p>Indicators:</p> <ol style="list-style-type: none"> 1. Contribution of tourism to the GRP of the Osh Region (Responsible: NSC KR); 2. Level of employment in the tourism sector of the Osh Region (Responsible: NSC KR). 					
<p>Root cause problem 1. <u>HUMAN RESOURCING</u> IN THE TOURISM INDUSTRY REMAINS AT A LOW LEVEL</p>					
<p>Strategic objective 1. <i>IMPROVE THE QUALITY AND EFFICIENCY OF WORK WITH HUMAN RESOURCES</i></p> <p>Indicators:</p> <ol style="list-style-type: none"> 1. Number of people trained under the STDSP educational project (Responsible: OJTDC); 2. Number of those who completed an internship under the STDSP museum project (Responsible: OJTDC). 					
	Conduct a training needs analysis for the tourism sector in the Osh Region	Department of Tourism	OJTDC	annually	Prepared a report on the needs for personnel and teaching staff
	Organize the formation of a reserve of qualified personnel in the tourism sector of the Osh Region	Department of Tourism	OJTDC	annually	A base of qualified personnel has been formed

	Organize a system of training and retraining of employees of the Osh Region's tourism sector for the study of foreign languages	Department of Tourism	OJTDC	annually	The range of tourist services in foreign languages has been expanded
PR27	Train adventure travel guides (pointman) for the mountainous regions of the Osh Region, taking into account the identified needs under the STDSP educational project	PRP KR in Osh province, LGA and LSG bodies of the region	OJTDC Bishkek Academy of Tourism OshSUy	annually	Increased capacity of guides in the Osh Region
PR42 PR43	Train tour guides and other museum staff taking into account the identified needs under the STDSP museum project	PRP KR in Osh province Osh Mayor's Office LGA and LSG bodies of the region	OJTDC Bishkek Academy of Tourism OshSU	annually	The capacity of guides and other museum staff in the has been increased, including engaged with online advanced training courses for museum affairs and museum management
PR17	Train employees of the culinary business for the regional tourism sector based on the identified needs under the STDSP educational project	PRP KR in Osh province Osh Mayor's Office LGA and LSG bodies of the region	OJTDC OshSU Kyrgyzstan-Türkiye Manas University	annually	The capacity of employees of the regional culinary business has been increased
PR11 PR12 PR16 PR27 PR32 PR36	Train tourism managers with knowledge of foreign languages based on the identified needs under the STDSP educational project	PRP KR in Osh province Osh Mayor's Office LGA and LSG bodies of the region	OJTDC Bishkek Academy of Tourism OshSU	annually	Increased capacity of sales, marketing and hospitality managers in the Osh Region
PR26	Implement a set of motivational measures to strengthen the capacity of teaching staff in the tourism sector within the STDSP educational project	DoT TDSF	OJTDC	until 2025	The shortage of teaching staff has been minimized.

PR37 PR34 PR35 PR36	Make proposals on joint strengthening of the capacity of the rescue service of the MES KR in the Osh Region on a pilot basis, incl. training of mine rescuers in remote areas of the region	DoT MES KR	OJTDC	until 2024	Rescue services are provided incl. in foreign languages. The technical capacity of the rescue service has been increased.
PR38 PR42 PR43	Organize the educational process, including in a hybrid form in the specialty "Museum Affairs" on the basis of tourism faculties	MCISYP KR PRP KR in Osh province Osh Mayor's Office	OJTDC Bishkek Academy of Tourism OshSU Manas University	until 2025	Curriculums on Museum Affairs have been launched at the tourism faculties in the universities of the Kyrgyz Republic
PR28	When creating the Unified Tourist Portal of the Osh Region, to form on a pilot basis a digital archive of documents and knowledge on tourism	DoT MDD TDSF	OJTDC Tourism associations (incl. KATO, KCBTA) Inform. center "Toktom"	until 2025	A constantly updated electronic database has been launched to preserve institutional memory and provide access to tourism information

Root cause problem 2. TOURISM PROMOTION PROCESS HAS WEAK INSTITUTIONAL SUPPORT

Strategic objective 2. INCREASE THE LEVEL OF INSTITUTIONAL SUPPORT FOR THE SECTOR, FOCUSING ON IMPROVING THE QUALITY OF SERVICES

Indicators:

1. Index of public confidence in the PRP KR in Osh province and the Osh Mayor's Office (Responsible: NSC KR);
2. Number of complaints within the tourism sector about the PRP KR in Osh province and the Osh Mayor's Office (Responsible: PRP KR in Osh province and the Osh Mayor's Office);
3. Volume of income from the activities of health resorts (Responsible: NSC KR);

4. Gross income of hotels and similar accommodation facilities (Responsible: NSC KR);					
5. Number of regional tourism sector issues resolved through the creation of the OJCTD (Responsible: OJCTD).					
	Introduce the practical application of national standards for the provision of tourism services	Department of Tourism	OJTDC	until 2025	Improved quality of tourism services
PR19 PR49	Merge the Tourism development councils under the PRP KR in Osh province and the Osh Mayor's Office into the single Osh Joint Council on Tourism Development (OJCTD), including representatives of regional environmental, urban planning and transport associations	PRP KR in Osh province Osh Mayor's Office LGA and LSG bodies of the region	OJTDC	until 2024	The Osh Joint Council on Tourism Development has been created with broad coordination functions in the field of tourism
PR4 PR5 PR6 PR7	Submit proposals for the transfer of certain functions in the field of tourism to the OJCTD based on the results of the diagnostics of the work of the PRP KR in Osh province and the Osh Mayor's Office	DoT MEC KR PRP KR in Osh province Osh Mayor's Office LGA and LSG bodies of the region	Tourism associations of the Kyrgyz Republic Expert community	until 2024	1. A process management has been introduced that allows evaluating the work of the PRP KR in Osh province, the Osh Mayor's Office the OJTDC as a single team; 2. Functional requirements have been introduced for the work of the PRP KR in Osh province, the Osh Mayor's Office, LGA and LSG bodies of the region in the field of tourism; 3. The capacity of the PRP KR in Osh province, the Osh Mayor's Office, LGA and LSG bodies of the region in tourism development has been strengthened.

PR32	Conduct sociological surveys to take into account the opinion of the population in the field of tourism in the Osh Region with the invitation of professional sociological companies	DoT TDSP	OJTDC	on a regular basis	Reports are periodically generated on feedback from the population, published on the created Tourist portal of the Osh Region
PR37	Create territorial commissions to ensure security at tourist sites	PRP KR in Osh province Osh Mayor's Office LGA and LSG bodies of the region	OJTDC	until 2025	Territorial commissions have been created to ensure security at tourist sites
PR41	Identify the range of commercial activities of state museums in the Osh Region, diagnose on a pilot basis the functioning of Sulaiman-Too and the Uzgen complex	MCISYP KR Osh Mayor's Office Uzgen Mayor's Office	OJTDC	until 2024	A register of paid services in Sulaiman-Too and the Uzgen complex has been formed
PR42 PR43	On a pilot basis for Sulaiman-Too and the Uzgen complex, introduce norms for the assessment, restoration and preservation of cultural values	MCISYP KR	OJTDC	until 2024	A NLA of the MCISYP KR on the implementation of standards for the evaluation, restoration and preservation of cultural property for state museums has been adopted
PR1	In the Osh Region, introduce the regulation of the strategic planning process for tourism development with the assignment of coordination functions to the OJCTD Conduct a series of trainings for representatives of the tourism industry and LSG bodies on such courses as "Tourism as a locomotive of the economy." One of the proposed tools is the STDSP educational project	DoT TDSF PRP KR in Osh province Osh Mayor's Office LGA and LSG bodies of the region	OJTDC Tourism associations of the KR Educational NGOs OshSU Regional associations of	until 2024	Under the Regulations on the OJCTD, the functions of coordinating the strategic planning of the tourism sector are transferred to the OJCTD A noticeable number of regional middle managers (5-10%) and representatives of the

			youth, women, PWD		tourism industry got an idea about the tourism industry, its role in the economic development
PR2 PR51	Introduce a system for monitoring and evaluating the implementation of the STDSP, including based on the methodology for collecting and calculating indicators in accordance with the methods used by UNWTO and World Travel Council and Tourism	DoT NSC KR PRP KR in Osh province Osh Mayor's Office LGA and LSG bodies of the region	OJTDC Silk Road Tour Operators Association	until 2024	The quality of the collected statistical data has been improved to improve the management of changes in the implementation of the STDSP, including on green economy issues
	Approve reporting formats for regular collection of information and data on the implementation of the STDSP (including taking into account the Tourism Satellite Account).	DoT PRP KR in Osh province Osh Mayor's Office LGA and LSG bodies of the region	OJTDC	until 2024	A single standard for collecting information and data has been formed
Root cause problem 3. <i>THE CURRENT <u>REGULATORY LEGAL ENVIRONMENT</u> IS NOT SUFFICIENTLY FAVORABLE FOR TOURISM DEVELOPMENT AS A PRIORITY SECTOR OF THE NATIONAL ECONOMY</i>					
Strategic objective 3. <i>ENHANCE THE REGULATORY ENVIRONMENT FOR SUSTAINABLE TOURISM DEVELOPMENT</i> Indicators: 1. Number of submitted NLA drafts affecting the tourism sector (Responsible: Department of Tourism); 2. Number of adopted NAP drafts affecting the tourism sector (Responsible: Department of Tourism).					
PR22	Amend the Model Regulation “On the procedure for granting the right to use pasture resources for other purposes not related to livestock grazing” to increase the period for transferring pasture	DoT MOA KR MNRETS KR	Tourism associations of the Kyrgyz Republic	until 2024	Long-term conditions for doing business in the tourism sector have been created.

	land for tourism and recreation purposes to 49 years following the study of the issue within the STDSP legislative project In the annual plans for pasture management, approved by the resolutions of local keneshes, immediately identify pasture areas for tourism purposes.	PRP KR in Osh province LGA and LSG bodies of the region	expert community		
PR21	Amend the Law "On Tourism" to ensure the modern development of tourism. As one of the tools, it is proposed to implement the STDSP legislative project	DoT MDD KR MNRETS KR MES KR NSC KR SSRSFM under CMKR	Tourism associations of the KR	until 2025	The Law "On Tourism" is harmonized with the legislation on insurance, statistics, emergency situations, and nature protection; A modern conceptual apparatus has been introduced into the Law.
PR37	Elaborate safety standards for tourists, indicating the areas of responsibility of state bodies and tour operators. As one of the tools, it is proposed to implement the STDSP legislative project	DoT MES KR MOH KR PRP KR in Osh province Osh Mayor's Office LGA and LSG bodies of the region	Tourism associations of the KR Expert community	2024	The new version of the Law "On Tourism" regulates the norms aimed at ensuring the safety of tourists.
PR33	Implement norms and professional standards governing adventure tourism guides and instructors. Expand the tourist nomenclature of the State Classifier of the Kyrgyz Republic "Types of economic activity"	DoT MES KR	OJTDC Federation of Mountaineering and Sports Climbing of the KRc	until 2026	Reduced risk of accidents. The range of types of tourist activities has been expanded
PR9 PR20	Amend the Tax Code of the Kyrgyz Republic to reduce the single tax rate for taxpayers providing services in the tourism	DoT MEC KR STS KR	OJTDC Tourism	until 2024	The adoption of the changes has led to the exit of many businesses from

	sector. It is advisable to reduce the single tax rate for a public catering entity from 8% to: 1) in the cities of Bishkek and Osh: a) 6% - in cash; b) 4% - in non-cash form. 2) in the rest of the country: a) 5% - in cash. b) 3% - in non-cash form.		associations of the KR HORECA Association		the shadow and increased tax collection
PR23	Develop relevant by-laws for the Laws of the Kyrgyz Republic “On Renewable Energy Sources” and “On the Park of Creative Industries”	DoT MDD KR MNRETS KR MEC KR	Tourism Associations of the KR Green Alliance of Kyrgyzstan	until 2026	Mechanisms for the implementation of laws have been introduced

**Root cause problem 4. LOW LEVEL OF THE POPULARITY OF GREEN ECONOMY PRINCIPLES,
AND THEIR POOR IMPLEMENTATION IN PRACTICE**

**Strategic objective 4. SPREAD A NATURE-FRIENDLY CULTURE
THROUGH THE PROMOTION OF GREEN ECONOMY AND SUSTAINABLE TOURISM**

Indicators:

1. Degree of implementation of strategic documents on the green economy in the context of the Osh Region (Responsible: PRP KR in Osh province, the Osh Mayor's Office, LGA and LSG bodies of the region, OJCTD);
2. Level of RES deployment, including biogas plants (%) in the Osh Region (Responsible: PRP KR in Osh province, the Osh Mayor's Office, OJCTD);
3. Total area of forests in the Osh Region (Responsible: PRP KR in Osh province, LGA and LSG bodies of the region, MNRETS KR, OJCTD);
4. Level of awareness of the regional population about respect for nature (results of a social survey) (Responsible: Green Alliance of Kyrgyzstan);
5. Number of waste container sites in the region (Responsible: PRP KR in Osh province, LGA and LSG bodies, the Osh Mayor's Office, MNRETS, OJCTD);
6. Number of waste container sites with separate waste collection in the region (Responsible: PRP KR in Osh province, LGA and LSG bodies, the Osh Mayor's Office, MNRETS, OJCTD);

<p>7. Number of enterprises for the processing of solid waste in the region (Responsible: PRP KR in Osh province, LGA and LSG bodies, the Osh Mayor's Office, MNRETS, OJCTD);</p> <p>8. Number of tourist destinations in the Osh Region (Responsible: PRP KR in Osh province, LGA and LSG bodies, the Osh Mayor's Office, MNRETS, OJCTD, NSC KR);</p> <p>9. Number of tourist destinations that have implemented the technology of organic waste disposal (Responsible: PRP KR in Osh province, LGA and LSG bodies, the Osh Mayor's Office, MNRETS, OJCTD);</p> <p>10. Area of reclaimed land in the Osh region (Responsible: PPP KR in Osh region, MSA and LSG, MOA KR).</p>					
PR48 PR49 PR54 PR55 PR56	At the legislative level, consolidate the need for long-term planning, taking into account the recreational capacity and throughput of the ecological potential of the destination territories	DoT MNRETS KR PRP KR in Osh province Osh Mayor's Office LGA and LSG bodies of the region	Environmental NGOs	until 2026	At the legislative level, environmental standards for tourist sites and destinations have been fixed
	At all levels, promote the creation of legal and economic conditions for the widest possible introduction and use of renewable energy sources and other resource-saving technologies. In particular, at the municipal level, introduce motivational mechanisms for enterprises and private entrepreneurs who have introduced green technologies.	MNRETS KR MEC KR PRP KR in Osh province Osh Mayor's Office LGA and LSG bodies of the region	Associations of women, youth, rural residents of the region		The number of tourist facilities and entities implementing energy and resource-efficient technologies has been increased.
	In cooperation with NGOs and international organizations, organize regular courses (for example, on the topics "Fundamentals of a Green Economy", "Environmental Situation in Kyrgyzstan and Central Asia", "Sustainable Energy and Renewable Energy") for employees of LSA and LSG bodies, managers of tourist destinations, etc. As one of the tools, it is proposed to implement the STDSP educational project		Business network WasteNet.KG		The capacity LSA and LSG employees, managers of tourist destinations on environmental protection have been increased
	Through the media, TV and social networks, carry out information campaigns about caring for the environment.	MNRETS KR PRP KR in Osh province Osh Mayor's Office	Green Alliance of Kyrgyzstan PERETO project Regional TV		All strata of local people are informed about the correct attitude towards

		LGA and LSG bodies of the region			the environment and comply with these rules
PR53	Make mandatory the separate collection and subsequent removal of non-organic waste through the signing of agreements with waste collection companies, with the introduction of appropriate penalties for destinations, as well as launch municipal programs for the separate collection of waste	DoT MNRETS KR PRP KR in Osh province Osh Mayor's Office LGA and LSG bodies of the region			MSW is sorted separately and delivered to waste processors
PR52	Regulate and implement on-site organic waste disposal technology, including through the of installation of small waste-treatment facilities, sewage, euroseptic, eco-toilets, etc.				Organic waste is disposed of by recycling using modern green technologies
PR49 PR51	Conduct a systematic environmental audit of all tourist destinations	DoT MNRETS KR	OJTDS Environmental NGOs Green Alliance of Kyrgyzstan	on a regular basis	A system for monitoring and assessing the impact of tourism on the environment has been introduced
PR50	Encourage the planting of forests on mountain slopes and other drought- and salt-tolerant crops that slow the melting of glaciers and contribute to the biological purification of the environment. For example, through funding under the Green Climate Fund project "Carbon Sequestration through Climate Investment Forests and Grasslands in the KR (CS-FOR)", implemented by FAO	DoT MNRETS KR MOA KR (Forest Service) PRP KR in Osh province Osh Mayor's Office LGA and LSG bodies of the region	Green Alliance of Kyrgyzstan environmental NGOs International organizations (including WB, FAO, Green Climate Fund, GIZ, etc.)	on a regular basis	Increased area of land planted with drought- and salt-tolerant crops
	Encourage the introduction of biogas technologies in the agricultural sector, as well as technologies that minimize tillage, preserve its moisture and organic matter through concessional lending, for example, under such state program "Agricultural Financing"				Reduced environmental impact
	Incentivize people to carefully use of water and land resources through introduction of drip and discrete irrigation technologies, sprinkling, application of organic fertilizers (biohumus, zoogumus, chlorella, humate), minimization of agrochemicals and				The local population uses chemical plant protection products and mineral fertilizers only in extreme

	other harmful substances through concessional lending under the state program "Agriculture Financing".				cases (locusts and other mass pests).
Root cause problem 5. THE OSH REGION IS POORLY PROMOTED IN TERMS OF <u>MARKETING</u>					
Strategic objective 5. CONTRIBUTE TO THE GROWTH OF THE REGION'S RECOGNITION IN THE GLOBAL TOURISM MARKET THROUGH THE INTRODUCTION OF MODERN MARKETING TOOLS					
Indicators: <ol style="list-style-type: none"> 1. Place of the Kyrgyz Republic on the WEF Tourism and Travel Competitiveness Index (Responsible: Tourism Department); 2. Place of Kyrgyzstan in the WEF World Hospitality Ranking (Responsible: Tourism Department) ; 3. Place of Kyrgyzstan in the Security Index measured by the Institute for Economics and Peace (Responsible: Tourism Department) ; 4. Number of accidents in adventure tourism in the Osh Region (Responsible: OJCTD); 5. Number of foreign tourists visiting the Osh Region (Responsible: NSC KR, SCNS KR); 6. Number of domestic tourists visiting the Osh Region (Responsible: NSC KR); 7. Volume of rendered tourist services (Responsible: NSC KR); 8. Length of tourist stays (Responsible: NSC KR); 9. Number of visits to the Tourist Portal of the Osh Region (after its creation) (Responsible: OJCTD). 					
PR44	Submit for approval the Marketing strategy for the Osh Region until 2028, prepared within the framework of the STDSP	DoT PRP KR in Osh province Osh Mayor's Office LGA and LSG bodies of the region	OJTDC	until 2024	Improved positive tourist image and recognition of the Osh Region
PR46	Create a Tourist portal of Osh Region	DoT MES KR PRP KR in Osh province Osh Mayor's Office	OJTDC Destination Osh	until 2024	A systematic digital approach to providing information about the tourism opportunities of the region has been implemented

PR12 PR47	Introduce international service quality standards in the HORECA segment In cooperation with tour operators, NGOs and international organizations, conduct regular courses (as an example, on the topic “Tourism as a Locomotive for Sustainable Economic Development”, “What the Client Wants”, “Why is Marketing Important”, “SMM-management”) for employees of travel companies and HORECA entities. As one of the tools, it is proposed to implement the STDSP educational project	DoT MEC KR	OJTDC Destination Osh Tourism and HORECA associations of the KR	until 2025	The quality and level of service in the HORECA segment have been raised Increased general understanding of the importance of tourism marketing promotion, new knowledge for practical work on the development of marketing and branding of individual destinations has been received
PR16	Through the Tourist portal provide information on the list of business entities delivering products and goods	DoT PRP KR in Osh province Osh Mayor’s Office	OJTDC Destination Osh	on a regular basis	The range of services for the delivery of products and goods has been expanded
PR40	Through the Tourist portal provide information about the museum objects of the Osh Region	DoT MCISYP KR	OJTDC Destination Osh	on a regular basis	Improved quality of information on museums
PR36	Integrate information materials on tourist safety issues on the Tourist portal with the official website of the Ministry of Emergency Situations of Kyrgyzstan	DoT MES KR	OJTDC	on a regular basis	Tourists have access to safety information
PR47	On a pilot basis, conduct a marketing-oriented interpretation of the historical and cultural significance of Sulaiman-Too and the Uzgen complex to increase interest among tourists	MCISYP KR	OJTDC Osh Travel	until 2025	Increased tourist attractiveness of pilot facilities
Root cause problem 6. <i>FINANCING OF THE REGIONAL TOURISM SECTOR, DESPITE THE DECLARED PRIORITY, CONTINUES TO BE CARRIED OUT ON THE LEFTOVER PRINCIPLE</i>					
Strategic objective 6. <i>CREATE FAVORABLE FINANCIAL AND ECONOMIC CONDITIONS FOR THE DEVELOPMENT OF TOURISM BUSINESS</i>					

Indicators: 1. Volume of investment in fixed capital and retail trade turnover in tourism (Responsible: NSC KR); 2. Volume of allocated funds for tourism development from the Republican budget (Responsible: NSC KR); 3. Export of services (income from the reception of foreign citizens) (Responsible: NSC KR).					
PR24 PR13 PR14	When forming and distributing the local budget, LSG bodies should prioritize issues of local importance that have a direct or indirect impact on the development of tourism in their administrative territory Extend public-private partnership (PPP) mechanisms to the tourism sector	PRP KR in Osh province LGA and LSG bodies of the region MEC	OJTDC	on a regular basis	The share of spending on tourism in the local budget has been increased. PPP mechanisms has been extended to the sector.
PR39 PR42	Make proposals for financing authorized state bodies in the field of culture on the basis of program budgeting to increase the effectiveness and efficiency of their work	MCISYP KR MOF KR	Cultural associations	until 2025	Funding for the cultural sector is provided at the level of 3% of the total budget expenditures of the KR in line with the Law of the Kyrgyz Republic "On Culture" dated April 7, 2009 No. 119
PR29 PR30 PR14 PR15 PR11	Conduct a campaign to inform representatives of the regional tourism sector about business lending and fundraising opportunities Conduct a series of training to improve financial and economic literacy, corporate culture, and business plan development for potential newcomers to the tourism business, with a special focus on rural residents, youth, and women. As one of the tools, it is proposed to implement the STDSP educational project	DoT TDSF PRP KR in Osh province Osh Mayor's Office LGA and LSG bodies of the region	OJTDC Associations of agricultural producers, youth, women's organizations of the region JIA Business Association	until 2025	Improved financial literacy of entrepreneurs in the tourism sector and related industries

**Root cause problem 7. ISSUES OF COMPREHENSIVE PLANNING AND INTEGRATED INFRASTRUCTURE MANAGEMENT
IN THE OSH REGION ARE POORLY DEVELOPED**

**Strategic objective 7. ADJUST THE WORK ON THE INTEGRATED DEVELOPMENT OF THE REGIONAL INFRASTRUCTURE
TAKING INTO ACCOUNT THE NEEDS OF THE TOURISM SECTOR**

Indicators:

1. Passenger throughput at the Osh airport (Responsible: NSC KR);
2. Length of new roads to tourist destinations of the region (Responsible: NSC KR);
3. Number of rest-points in the Osh Region (Responsible: NSC KR);
4. Number of registered business entities in the regional tourism sector (Responsible: NSC KR);
5. Number of electrified business entities in the regional tourism sector (Responsible: NSC KR);
6. Cell phone and the Internet coverage in the Osh Region (Responsible: NSC KR).

PR57	Make proposals to improve the attractiveness of the bus station in Osh, improve the quality of paving and road surface, navigation, comfort of toilets, as well as increase the number of benches, urns, stairs and other hardscaping	Osh Mayor's Office MTC KR	OJCTD	until 2024	The condition of the Osh bus station and its service points has been improved
PR59	Make proposals to the draft detailed planning of Osh city to streamline parking on city streets	Osh Mayor's Office	OJCTD	until 2024	Increased urban mobility
PR60	Make proposals to the draft detailed planning of the Osh Region's cities to improve the pedestrian and cycling infrastructure. As one of the tools, use the opportunities of the project of ARIS KR "Regional Economic Development" , which provides for the modernization of public spaces and parks in the cities of Osh and Uzgen	PRP KR in Osh province Osh Mayor's Office LGA and LSG bodies of the region ARIS	OJCTD	until 2024	The quality of sidewalks has been improved and bike paths have been created
PR61	Bring to its logical conclusion the project with the establishment of rest-points along the main tourist routes, with the attraction of private investment in its further maintenance, as well as expansion	DoT TDSF	OJCTD	until 2026	Rest-points have been created along the main tourist routes, they are

	through new cafes, motels, campsites, yurt camps, first-aid posts, gas stations, service stations, vulcanization, shops and toilets Within the framework of the STDSP infrastructure projects , improve navigation support for tourist destinations				integrated with other roadside infrastructure facilities. Implemented navigation in foreign languages.
PR58	Together with financial institutions, introduce the practice of leasing and other stimulating financial measures to renew the fleet of vehicles of transport companies and carriers	PRP KR in Osh province Osh Mayor's Office LGA and LSG bodies of the region	Financial institutions	on a regular basis	Public transport facilities have been updated to meet safety and environmental standards
PR62 PR63 PR64 PR65 PR66 PR67 PR68	Recommend a comprehensive modernization of the Osh airport, which should include, but not be limited to: - construction of a new passenger terminal with a capacity of 1000-1500 passenger traffic per hour; - bringing the terminal infrastructure in line with the standards of passenger inclusiveness and comfort; - integration of the airport with public transport in Osh, creation of a multimodal transport complex based on it.	DoT FUGI under MEC KR PRP KR in Osh province Osh Mayor's Office	OJTDC OJSC "Manas International Airport"	until 2025	Attractive investment conditions have been created for airlines to increase the number and geography of international flights
PR7 PR13 PR39 PR59 PR60 PR68	When developing Action Plans for the development of road and transport infrastructure, it is mandatory to involve representatives of the private and civil sectors, incl. from the tourism industry Organize educational programs for senior and middle-level employees of municipalities and transport companies on the courses "Sustainable and Inclusive Environment", "Urban Planning", "Fundamentals of Urban Studies", etc. As one of the tools, it is proposed to implement the STDSP educational project	DoT MTK KR	OJTDC Associations of transport workers and urbanists of the KR	until 2024	Reduced costs in the decision-making process. Improved quality of transport planning and operation of road infrastructure. Conditions have been created for the preservation of institutional memory at all levels.
PR39	On a pilot basis, improve the material and technical base and infrastructure of Sulaiman-Too and the Uzgen complex	MCISYP KR PRP KR in Osh province	OJTDC Tourism	until 2025	Comfortable and inclusive conditions for visiting

	Within the framework of various programs, for example, the project of ARIS KR "Regional Economic Development" , to attract investments in the urban infrastructure of the regional tourism sector	Osh Mayor's Office LGA and LSG bodies of the region ARIS	Associations of the KR		museums and other public spaces have been created
PR54 PR45	In cooperation with the district state administrations, encourage JSC "Oshelectro" to electrify, and mobile operators to expand the coverage of mobile communications in the locations of tourist destinations, including in remote mountainous areas	PRP KR in Osh province Osh Mayor's Office LGA and LSG bodies of the region	OJTDC mobile operators "Kyrgyz- telecom" "Oshelectro"	until 2024	Electrification was carried out and coverage of mobile communications was expanded in the locations of tourist destinations, incl. in remote mountainous areas Increased quality of tourism services/ increases in the duration of the tourist season.

APPENDICES

Appendix 1a. Main tourist destinations in the Osh Region

The term "tourist destination" was introduced by N. Leiper in the mid-1980s. Now it is understood as a geographical area with certain boundaries, which can attract a fairly wide range of tourists and satisfy their interests.

The study of the regional tourism potential, numerous conversations with representatives of local authorities and leading tour operators made it possible to determine *the following list of the main tourist destinations* in the Osh Region.

Cultural and historical sights

Sulaiman-Too (Osh). This is one of the most important cultural attractions of Kyrgyzstan and the first state object of the country, included in the UNESCO World Heritage List Sulaiman-Too ("Sulayman Mountain") or Takhti-Sulayman ("Throne of Sulayman", that is, the biblical King Solomon) is located right in the city center. The mountain itself, which stretches for almost a kilometer, is made of limestone and has five peaks, the highest of which rises to a height of 150 meters above the city. Due to the geological features, there are a large number of caves and grottoes in it.

According to historians, since the X century, pilgrims from all over Asia have been drawn towards this seemingly inconspicuous rocky hill, since it was believed that it was here that the Prophet Sulayman turned to God, and the prints of his forehead and knees remained on the stones. Later, over this holy place for every Muslim, Muhammad Zahiriddin Babur (1483 - 1530), Timur's great-grandson and founder of the Great Mogul dynasty, built a small hujra (cell) with a mihrab, on the site of which a single-chamber white-stone mosque rises today - recreated according to archival sources "Babur's house".

Sulaiman-Too National Historical and Archaeological Museum Complex was established in 1949. The central building is located at the foot of the mountain of the same name. It stores more than 33 thousand exhibits related to the history, archeology, art, nature of southern Kyrgyzstan. Perhaps the most popular part of this museum complex is the part of the museum opened in the late 1970s on the southern slope of one of the peaks of the mountain. The ground floor of this museum consists of expanded karst caves, while the top floor is made up of a natural cave. The artifacts collected in the museum are associated with many religious cults that have existed in Central Asia since ancient times: from animism and shamanism to world religions.

Asafibn Burhia Mausoleum located at the southeastern foot of Sulaiman-Too is a place of Muslim pilgrimage. It was built in the XVIII century in the traditions of the Fergana architectural school. This is a rectangular portal-domed structure, owned by the state, measuring 7.3 by 9.6 m. The corners of the building, as is customary in Islamic architecture, are oriented in the cardinal directions. The dome with a diameter of 4.4 m is based on an octagonal drum. The interior has an octahedral shape with side lengths from 2.11 to 2.23 m. The portal-domed niche of the mausoleum highlights its special beauty. The upper part of the portal ends with scallops in the form of a stylized trefoil. Decorative columns are installed along its edges. The entire entrance niche is decorated with complex ganch decor. In the 1999-2000s as part of the celebration of the 3000th Osh anniversary, the dome of the mausoleum was partially restored. In 2013, restoration work began on the upper part of the mausoleum, the windows of the dome, and the restoration of the original design of the facade, and interior decoration.

Ravat Abdullakhan Mosque is also located at the southeastern foot of Sulaiman-Too. The Mosque was built in the middle of the XVI century during the period when Abdullakhan II (1534-1598) of the Sheibanid dynasty reached its greatest power, when, as a result of aggressive campaigns, he managed to unite under his rule not only Maveranarkh (the interfluvium of the Amu-Darya and the Syr-Darya), but also Balkh, Khorezm, Khorassan, part of the Fergana Valley, including Osh.

Osh Central Bazaar is spread for one kilometer along the banks of the Ak-Buura River. This market has existed in one place for more than 2000 years, since the time when the Fergana branch of the Silk Road passed through Osh. Despite the chaos reigning here, the bazaar, which functions as the central city market, is very popular with tourists due to its unique oriental flavor, affordable prices, and a wide selection of various products - from food and clothing to rare souvenirs and original jewelry, and even live cattle.

State Historical and Cultural Museum-Reserve "Özgön" (Uzgen city). This state object consists of several outstanding monuments of Central Asian architecture: the Uzgen minaret and a group of three mausoleums built at different times but representing a single architectural ensemble. The buildings date back to the XI-XII centuries AD. This was the era of the rule of the Karakhanids, whose western capital was Uzgen. The buildings of the Karakhanid period have pronounced distinctive features: various patterns of brick and ganch are used as exterior decoration, without the use of glaze and colored inserts.

Uzgen minaret rises today 27 meters above ground level. However, the original height of the minaret was almost 2 times higher - numerous earthquakes brought down the upper part of the tower. The minaret was restored in Soviet times, and for the safety of the structure, a historically authentic observation deck with windows offering a panoramic view of Uzgen was added to it. The base of the minaret is made in the form of an octagon, one side of which has an entrance to the tower with a steep spiral staircase. Believers have been called to prayer from the minaret for centuries. In addition, it was a good reference point for travelers and merchants passing through these areas.

Uzgen mausoleum complex consists of three separate mausoleums, differing in the year of construction and style of decoration. They are named according to their location as the Southern, Middle, and Northern mausoleums. The largest and most remarkable is the Middle Mausoleum, which has an interesting feature. This is the only Karakhanid mausoleum that has two portals at once. The true purpose of the middle, very first mausoleum is still unknown. Some scientists are inclined to believe that one of the khans of the Karakhanid dynasty is buried in it. Others insist that it had religious significance. The other two mausoleums do not cause such discrepancies. The northern mausoleum is the burial place of Jalil ad-Din al-Hussein Hasan ibn Ali, the ruler of the Karakhanids. The southern mausoleum was built much later than the others, and the name of the person buried in it is unknown.

All buildings of the complex were seriously damaged by time and were restored in their original form during the Soviet period.

Rice mill (Uzgen city). This privately owned rice mill on Orom Street is an old wooden mill equipped to process red rice using ancient techniques. Tourists visiting the Uzgen district are first invited to visit the rice fields near the town, where they get acquainted with the technology of rice cultivation. After that, tourists are taken to the mill, where the guide tells visitors about processing raw rice into a finished product. In the first stage, the raw rice is dried, after which it is passed through a threshing unit, which works due to the kinetic energy of a water mill, and at the final stage, it undergoes additional cleaning. The excursion to the mill ends with a visit to Ashkhana, where tourists personally observe the process of making pilaf from real Uzgen rice and participate in a meal of delicious food.

Alay Regional Historical Museum named after Kurmanjan-Datka (Alay district, Gulcha village). This state museum was opened in 1990 on the occasion of the celebration of the 180th anniversary of Kurmanjan Datka. It is a two-story building with a rich exposition collection of life and household items, social and political activities of the Alay Queen and her husband Alymbek Datka and her husband Alymbek Datka³⁰. The museum also presents expositions reflecting the peculiarities of the life and culture of the Kyrgyz people in the 19th century.

Duldul-At Petroglyphs (Aravan district). This state monument is a stone ridge, a rock, on some surfaces of which, at a height of 15-16 m, rock carvings of people, mountain goats, deer, horses, and wild animals are carved. Ancient people depicted heavenly horses here. Among them, large images of two pairs of horses stand out sharply, most likely stallions and mares. Their figures are rendered artistically gracefully - the contours are scratched on a stone almost life-size and painted over with an ocher substance that has not lost its bright color over the millennia. The peculiarities of the style and technique of these images allowed A.N. Bernstam to connect them with the legend of high-bred heavenly horses "Tianma", bred in the ancient kingdom of Davan, which existed in the Fergana Valley.

Together with the mausoleum, childekana (ritual house), and the Duldul-At spring, it forms a single sacred complex. Childless families, unmarried girls and women, single persons, the sick, and those who are going on a long trip come here.

Kul-Datka Fortress (Chong Alay district). This is a historical state object, located in Daroot-Korgon village, Chong-Alay district - about 300 km southwest of Osh. The fortress was built in 1820-21 by the Kokand Khanate for defensive purposes and was named after one of the military leaders of that time. Later it was used as a fortification during the confrontation with the troops of the Russian Empire. This quadrangular building with bastions at the corners is made of mud brick. On the territory of the fortress, there was a residence of local ilbeks - Kokand governors, merchants, and traders, who arrived from the capital of the khanate.

Natural tourism and recreational destinations

Lenin Peak (7134.3 m, Chong Alay district) is one of the most famous and most frequently visited seven-thousanders of the Pamirs (about 3-5 thousand climbers annually). It is part of the Chong-Alay Range, which forms the border between Kyrgyzstan and Tajikistan. In 2006, by the decision of the Government of Tajikistan, the mountain was given a new name in honor of Abu Ali ibn Sina (Avicenna) but in Kyrgyzstan, the mountain peak retains its former name.

Despite the fact that the classical route from Kyrgyzstan (Chong-Alay district) is technically simple, climbing Lenin Peak belongs to the high-altitude mountaineering class and requires climbers to be in good physical health, appropriate equipment and a period of gradual acclimatization. The Achyk-Tash base camp was opened with the entire necessary climbing infrastructure at the foot of the peak, in the mountain area with the same name at an altitude of 3,600 m. Lenin Peak is not the only mountain peak in the region. There are more than 1.5 thousand glaciers on the territory of the Osh Region with a total area of 1,546.3 km². The largest of them are just located on the northern slopes of the Chong-Alay Range. In addition to climbers, the

30 Kurmanzhan Datka was a Kyrgyz stateswoman and military leader, leader and ruler of the Alay Kyrgyz people at the middle of the 19th century. She is also known as "Queen of Alay", "Queen of the South", and "Mother of the Nation". She had the title of Datka (Queen) in the Kokand Khanate and the Emirate of Bukhara.

Alymbek Datka was a major Kokand political figure in the first part of the 19th century. He was the ruler of the Andijan vilayet and a vizier of the Kokand Khanate. Later he went into opposition to the Kokand khans and became the organizer of a major uprising, which he staged in 1860, being accused before the khan of refusing to fight the Russians. In 1862 he was killed by palace conspirators of the Kokand Khanate. His wife Kurmanjan Datka after his death became the ruler of the southern Kyrgyz clans.

Chong-Alay and Alay Ranges annually attract many lovers of outdoor activities - hiking, and trekking.

A real mecca for lovers of mountain photo tours is the **Taldyk Pass** on the Alay Range, located 160 km south of Osh at an altitude of 3,600 m. The Taldyk Pass is a kind of gateway to one of the highest and most beautiful roads in the world - the Pamir Highway.

One of the leading operators of tourist services in the Alay district is the **CBT Sary-Mogol**, located in the village of the same name, 220 km from Osh. CBT Sary-Mogol was founded in 2007 with the support of HELVETAS as a non-governmental commercial organization. The company specializes in providing hotel services, organizing horse and bicycle tours, trekking and hiking, as well as holding various ethnic festivals and national sports competitions for tourists visiting Tulpar-Kul Lake.

CBT Sary-Mogol is a part of the structure of the "Kyrgyz Community Based Tourism Association "Hospitality Kyrgyzstan" (KCBTA)". The purpose of this Association is to improve living conditions in remote mountainous regions through the development of a sustainable model of ecotourism.

Kojo-Kelen valley (Kara-Suu district) is located 95 km southwest of Osh, along the Djiptyk River, at the foot of the Alay Range. Steep cliffs made of huge boulders, dense spruce forests, green meadows, marvelous waterfalls, and grottoes are a real delight for visitors to these places. The valley is inhabited by badgers, wild boars, and argali; yaks graze in the meadows. Kozho-Kelen is surrounded by Red Rocks, where a tourist can go horse riding or hiking.

Chyiyrchyk pass (Kara-Suu district), located 40 km south of Osh on the Pamir Highway, is one of the most attractive tourist destinations for residents of the city and nearby areas. In summer, there are numerous cafes serving kymyz and various Kyrgyz national dishes. In winter, the pass is used as a ski base - people go skiing here and popular in Kyrgyzstan tubing - automobile cylinders from heavy vehicles. There is a cable car at the base.

Abshyr-Ata Waterfall (Nookat district). The Abshyr-Ata gorge is primarily known for its 15-meter waterfall, which flows out of a small karst cave located right in the rock. The waterfall itself and the gorge with this waterfall are one of the most visited sights of the Osh region. This state object is located 70 km from Osh.

Since ancient times, this waterfall has been considered a sacred place because of its unusualness - in Kyrgyzstan, there are almost no waterfalls flowing directly from the rocks. The waterfall is located in the beautiful valley of the Abshyr-Say River, which is at an altitude of 1500 to 2500 m. In addition to the waterfall, there are a lot of interesting sites in this gorge. For example, several sacred places:

- *Syrduu-Tash (Mysterious Stone)*, where people throw seven pebbles and make seven wishes, and believe that they will come true;
- *Shypaa-Bulak (Healing spring)*, the water of which has healing properties;
- *Unkur (Cave)*, people read the Koran in it because it is believed that there are secret paths leading to Mecca.

Moreover, there are rock paintings in the Abshir-Say valley, which are located quite far from the waterfall: 5 and 20 kilometers.

Alaykuu valley (Kara-Kulja district) is located on the eastern outskirts of the Kara-Kulja district. In addition to great opportunities for the development of eco- and ethnic tourism, the valley is notable for the presence of the innovative Alayku Eco-Farm. This private facility has ample opportunities for both passive and active tourism. On the territory of the eco-farm, there is a yurt camp, a guest house with several rooms with all amenities, a coffee shop, a kitchen, and a dairy shop. Solar collectors are installed on the roof of the main building of the eco-farm; there is a

biogas plant, which together allows generating most of the electricity consumed through the use of renewable energy sources. A kind of the highlight of the eco-farm is a small milk processing workshop, where tourists are introduced to milk processing technologies and treated to fresh dairy products.

Kyrgyz-Ata National Park (Nookat district). The Kyrgyz-Ata National Park is a vast natural complex of national importance, located in Osh region, 40 km south of Osh on the northern slope of the Alay Range. The territory of the park is rich in various attractions. Most of the national park is a botanical reserve created to preserve juniper forests, mountain tulips, and saffron. The mountains of the Alay Range belong to the Pamir Mountain system and are made of multi-colored marble rocks. Kyrgyz-Ata includes several gorges, among which the most picturesque mountainous areas are Karagoy, Kalday, and Mazar. The Karagoy gorge is the most popular among visitors to the park. Vacationers come here every weekend from Osh and other districts of Osh Region.

The Nookat mountain drawings are widely known, located in the Aravan-Dangi canyon, broken through by the Aravan-Say River. On the steep walls of the canyon, which height reaches 500 m, images of animals can be seen, as well as various signs left by primitive people. Among other things, there are several mineral springs in the park, the most famous of which are Tuya-Moyun and Eski-Nookat.

Kara-Shoro National Park (Uzgen district). The territory of this state national park is about 8,500 hectares. This place is known for numerous sources of mineral waters, attracting mainly residents of nearby areas. The natural park is located at the junction of the Tien Shan and Pamir-Alay Mountain systems. Kara-Shoro River flows through the center of the park, flowing to the west and having numerous tributaries: Kachyraly, Kara-Bulak, Balam-Kaldy, Chong-Kulubek, Chong-Tuyba, and Chytty.

Sary-Oy gorge (Alay district). This gorge, located 80 km from the city of Osh, provides excellent opportunities for the development of ethnic tourism. One of the most successful investment projects implemented in the gorge is Rayan Eco Resort. This private project, currently being implemented with investment support from the Accelerate Prosperity program, positions itself as an ethnic hotel for a country holiday. According to the creators' plans, the location will consist of two parts: a yurt camp and a cottage village. The first part, consisting of 8 yurts with all amenities, has already been equipped and receives guests in the summer. Upon completion of the cottage part, designed for multi-day and year-round recreation, the ethnic hotel will be a multifunctional complex, including a sports ground, a spa complex, a bathhouse, a barbecue area, and a conference room. Water supply and sewerage were carried out at the facility; a small hydroelectric power station was built. The destination actively uses the services of local residents and creates jobs for them.

One of the actively developing destinations in Osh region is ***Aral Resort***. Located in Bulolu village of Alay district, this tourist recreation center provides opportunities for active recreation activities.

Chil-Ustun cave (Aravan district) is a system of karst caves in the mountain range of the same name near Aravan village. The cave has a length of 380 m and consists of three spacious halls connected by narrow corridors. Bats live in the cave; its halls are full with numerous stalactites and stalagmites, which, according to some estimates, are up to 350 mln years old. In the spring, after heavy rainfall, parts of the cave halls are filled with water. The cave has been known to people since ancient times, as evidenced by the Arabic inscriptions left in ancient times on its walls. In order to get into it, a visitor should have light climbing equipment. As a tourist site, the cave is interesting from the point of view of the development of speleological and scientific tourism here.

In the immediate vicinity of the cave there is the ***Charban grove***. In Soviet times, a complex of buildings for recreation was constructed here, including a children's camp, which currently accepts

only a small number (up to 100 people) of children. The territory of the camp is on the balance of the trade union association of the Aravan district. It has outdoor pools and opportunities for outdoor activities. Due to the lack of adequate hotels in the Aravan district, local authorities and enthusiasts are looking for private investors to build hotel rooms aimed at tourists visiting the cave.

Little Paris Panoramic Café (Osh). This private café is located in the On-Adyr area on the southern outskirts of the city. The destination is a terraced building with a beautiful view of Sulaiman-Too and its surroundings. The location is used by local tour operators to organize evening promenades for guests of the southern capital in Kyrgyzstan, where they can, among other things, taste different types of barbecues and enjoy local ice cream.

Appendix 1b. Profiles of pilot tourist destinations

Destination	SULAYMAN - TOO
Location	Osh city
Type of destination	Petroglyphs, museum and sacred place
Seasonality	year-round
Altitude above sea level	1.115 m
General plan of the territory	Yes
Landscaping	Have (Apricot, Chynar, Elm, shrubs)
Availability of vehicles	Yes
Bike transport availability	Yes
Car parking	Yes
Bike parking	Don't have (no specialized parking)
Parking for buses	Don't have (no specialized parking)
Inclusiveness of the territory	No
Paving of the territory	Stone pavement, asphalt and paving stones
Lighting	Partly
Water supply	Partly
Sewage system	No
Drainage	No
Benches	Partly, in limited quantities
Bins/Trash cans	Partly, in limited quantities
Awnings	No
Recreation areas	Partly, in limited quantities
WC	Have, in poor condition
Navigation (Pointers)	Have, in poor condition
Information stand	Have, in poor condition
Visual garbage	Yes
Type of ownership	State (Ministry of Culture)
Existing tours	Yes
Object state (Conclusions)	The infrastructure is in a deplorable state. Incomprehensible and inconvenient navigation, dead wood, poor condition of toilets, uncomfortable stairs, a lot of garbage, lack of a single design code. The territory of the complex is poorly integrated with the urban environment and does not fully use its tourism potential. The museum is in need of a major overhaul and renovation, content rethinking.

	The development of a project for a buffer zone of cultural heritage sites in the city of Osh with an urban planning regime has not been completed, which limits and slows down infrastructural changes in the Suleyman-Too buffer zone.
Recommendations	<p>Improve street navigation to the facility and inside the facility, organize interactive information stands, organize car and bicycle parking, improve paving, make it safe, improve area lighting, install high-quality and anti-vandal hardscapes.</p> <p>Complete the development of the project for the protected zone of cultural heritage sites, Detailed Planning and Development Standards and Land Utilization of Osh city.</p>

Destination

UZGEN COMPLEX

Location	Uzgen district, Uzgen city
Type of destination	Historical and cultural
Seasonality	year-round
Distance from Osh city	55,2 km
Distance from the district center	300 m
Altitude above sea level	1025 m
General plan of the territory	Have
Landscaping	Have, in unsatisfactory condition
Availability of vehicles	Asphalt pavement. City center
Bike transport availability	Yes
Car parking	Yes
Bike parking	No
Parking for buses	No
Inclusiveness of the territory	Don't have
Paving of the territory	Paving stones of different types, at different levels
Lighting	Have (the design of the lighting lamps spoil the overall architectural style of the complex)
Water supply	Yes
Sewage system	No
Drainage	No
Benches	Have, in poor condition
Bins/Trash cans	Yes
Awnings	Yes
Recreation areas	Yes
WC	Have, outdoor cold toilet. In bad condition.
Navigation (Pointers)	Have, need to improve and make it more understandable
Information stand	Have, need to improve and make it more understandable and attractive
Visual garbage	Have, design of information stands, vandal inscriptions on the walls of the tower and mausoleum
Form of ownership	State (Ministry of Culture)
Availability of existing tours	Yes

Object state (Conclusions)	Weak content. Uninformative and uninteresting information stands. There is no single architectural ensemble. The territory of the complex is in a state of disrepair. The landscaping elements are not related to each other and, taken together, negatively affect the overall visual appearance of the complex.
Recommendations	It is important to improve the external appearance of the territory, make all navigation in the same style, in clear fonts and several languages, improve landscaping: make paving in the historical style so that it does not contrast with architectural monuments, but forms a single architectural ensemble. Create conditions for family visits: rooms for children, inclusive design, ramps. Solve the issue with the iron protective cover of the mausoleum. The metal frame structure protects the mausoleum from precipitation, but greatly reduces its visual appeal. Qualitatively improve the content of the territory: an open-air museum, hardscaping, souvenir shops, areas for master classes and cultural fairs.

Destination

KURMANJAN-DATKA MUSEUM

Location	Alay district, Gulcha village
Type of destination	History, cultural and educational
Seasonality	year-round
Distance from Osh city	85 km
Distance from the district center	1 km
Altitude above sea level	1540
General plan of the territory	Don't have
Landscaping	Yes (flowers, trees)
Availability of vehicles	Yes
Bike transport availability	Yes
Car parking	Yes
Bike parking	Don't have
Parking for buses	Don't have (no specialized parking)
Inclusiveness of the territory	No
Paving of the territory	No
Lighting	Yes
Water supply	Yes
Sewage system	Don't have
Drainage	Have (improvements required)
Benches	Yes
Bins/Trash cans	Yes
Awnings	Don't have
Recreation areas	Yes
WC	Yes
Navigation (Pointers)	No
Information stand	Yes
Visual garbage	No
Form of ownership	State, Ministry of Culture
Availability of existing tours	No

Object state (Conclusions)	Repair of the roof of the museum, heating systems, water supply and sewerage are required. Employees and visitors have to go to the toilet outside. The territory is landscaped, but unattractive and does not carry aesthetic value. The workshop and souvenir shops are closed. There is no architectural integrity of the building and the surrounding area.
Recommendations	Improve the appearance of the territory, make all navigation in one style, in clear fonts and several languages, improve landscaping: make paving, create conditions for family visits: rooms for children, inclusive design, ramps. Qualitatively improve the content of the territory: an open-air museum, hardscapes, souvenir shops, areas for master classes and cultural fairs.

Destination

WATERFALL ABSHYR-ATA

Location	Nookat district, Abshyr -Say village
Type of destination	Natural sacred place
Seasonality	May-September
Distance from Osh city	70 km, (2.5 hours)
Distance from the district center	40 km
Altitude above sea level	1,780 m
General plan of the territory	Missing (not publicly available)
Landscaping	No
Availability of vehicles	Gravel cover
Bike transport availability	No
Car parking	No (Chaotic parking)
Bike parking	No
Parking for buses	No (There is no a specialized parking)
Inclusiveness of the territory	No
Paving of the territory	No
Lighting	No
Water supply	Yes
Sewage system	No
Drainage	Yes
Benches	Have but in poor condition
Bins/Trash cans	Have but in small quantities
Awnings	No
Recreation areas	Yes
WC	There are street toilets in very poor condition
Navigation (Pointers)	Insufficient, inconspicuous and uninformative
Information stand	Have but in poor condition
Visual garbage	Many
Form of ownership	Municipal
Availability of existing tours	Yes

Object state (Conclusions)	<p>A popular place among local tourists and tourists from Uzbekistan. Water from the waterfall is actively used for recreational purposes in nearby recreation areas.</p> <p>Chaotic trade spoils the general appearance of the location and prevents the rational and efficient use of the territory of the destination. Also negatively affected is the lack of quality toilets and the lack of clear and understandable navigation for motorists and pedestrians. A lot of visual garbage in the form of outlets, informational banners and garbage.</p>
Recommendations	<p>Improve street navigation to and within the facility, organize interactive information stands, organize car and bicycle parking, create paving from natural local materials, make it safe, improve area lighting, install high-quality and anti-vandal hardscapes.</p> <p>Organize points of sale in a safe place that will not spoil the appearance of the tourist destination and will not interfere with the mobility of cars and people. Build inclusive toilets without waste entering water and soil.</p>

Destination

DULDUL-AT

Location	Aravan district, Aravan village
Type of destination	Petroglyphs and sacred place
Seasonality	year-round
Distance from Osh city	27 km
Distance from the district center	1 km
Altitude above sea level	790-795 m
General plan of the territory	Absent (not publicly available)
Landscaping	Have (Fruit trees, flowers)
Availability of vehicles	Have, the object is located within the boundaries of the locality
Bike transport availability	Yes
Car parking	Don't have (no specialized parking)
Bike parking	No
Parking for buses	Don't have (no specialized parking)
Inclusiveness of the territory	No
Paving of the territory	Paving stones of different types
Lighting	Don't have
Water supply	Yes
Sewage system	No
Drainage	Yes
Benches	No
Bins/Trash cans	No
Awnings	No
Recreation areas	No
WC	Don't have (mosque toilet, only male)
Navigation (Pointers)	No
Information stand	No
Visual garbage	No
Form of ownership	Municipal

Availability of existing tours	Yes
Object state (Conclusions)	A clean place, the territory is still being used as a mosque and its adjacent territory, there is a kumboz at the facility, which is a place of pilgrimage among the local population. There is no information about petroglyphs and their historical value on the territory.
Recommendations	Determine the rule of visiting the location (together with the administration of the mosque and ayil okmotu). Improve street navigation to and within the facility, organize interactive information stands, organize car and bicycle parking, improve paving, make it safe, improve area lighting, install high-quality and anti-vandal hardscapes.

Destination

FORTRESS "KUL-DATKA"

Location	Chong-Alay district, Daroot-Korgon village
Type of destination	History, Culture
Seasonality	year-round
Distance from Osh city	280 km
Distance from the district center	1 km
Altitude above sea level	2470
General plan of the territory	Absent (not publicly available)
Landscaping	-
Availability of vehicles	unpaved road
Bike transport availability	No
Car parking	Don't have (no specialized parking)
Bike parking	Don't have
Parking for buses	Don't have (no specialized parking)
Inclusiveness of the territory	Don't have
Paving of the territory	Have, concrete coating
Lighting	No
Water supply	No
Sewage system	No
Drainage	No
Benches	Have (do not fit into the architecture of the fortress)
Bins/Trash cans	Have (do not fit into the architecture of the fortress)
Awnings	No
Recreation areas	No
WC	No
Navigation (Pointers)	No
Information stand	No
Visual garbage	No
Form of ownership	Municipal
Availability of existing tours	Not
Object state (Conclusions)	There is no infrastructure, no concept and integral development of the territory. At the moment, there is very low potential to attract tour operator and tourists.

Recommendations	Create infrastructure: Entrance, ticket office, toilet, street navigation to the facility and inside the facility, organization of interactive information stands, organize car parking, improve paving and make it in color according to the architecture of the fortress, organize area lighting, install high-quality and design hardscapes, appropriate context and architecture of the fortress. Create content, open air museum and exhibition.
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Destination

SARY-OY ALAY RAYAN ECO RESORT

Location	Alay district, Sary-Oy area
Type of destination	Ecotourism, ethnotourism
Seasonality	May-September
Distance from Osh city	80 km
Distance from the district center	23.6 km
Altitude above sea level	2,500 m
General plan of the territory	Yes
Landscaping	Yes, new plantings
Availability of vehicles	Yes
Bike transport availability	No
Car parking	Yes
Bike parking	No
Parking for buses	No (There is no a specialized one)
Inclusiveness of the territory	No
Paving of the territory	Backfill paving (stones, coarse gravel)
Lighting	No
Water supply	Yes
Sewage system	Yes
Drainage	Yes
Benches	Yes
Bins/Trash cans	Yes
Awnings	Yes
Recreation areas	No
WC	Yes
Navigation (Pointers)	No
Information stand	No
Visual garbage	No
Form of ownership	Private
Availability of existing tours	No
Object state (Conclusions)	The object is under construction. Located in a picturesque place with a beautiful natural landscape. Good potential to attract domestic and foreign tourists. For this period, there are issues on environmental safety: the use of water resources, wastewater treatment, collection and disposal of garbage. The content filling needs to be improved.
Recommendations	Refine and bring treatment facilities in line with environmental standards. Improve landscaping of the territory, improve street

	navigation to the facility and inside it, improve paving, make it safe, improve area lighting, install high-quality and anti-vandal hardscape.
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Destination

KARA-SHORO NATIONAL PARK

Location	Uzgen district
Type of destination	National Park
Seasonality	year-round
Distance from Osh city	95 km
Distance from the district center	111 km
Altitude above sea level	-
General plan of the territory	Absent (not publicly available)
Landscaping	Natural
Availability of vehicles	Unpaved roads
Bike transport availability	No
Bike parking	Don't have
Parking for buses	Don't have (no specialized parking)
Inclusiveness of the territory	No
Paving of the territory	Stones, paving stones, asphalt
Lighting	No
Water supply	No
Sewage system	No
Drainage	No
Benches	Yes, but in poor condition
Bins/Trash cans	Yes
Recreation areas	Yes
WC	Have, the outdoor toilets are in very poor condition
Navigation (Pointers)	Insufficient, inconspicuous and uninformative
Information stand	Have, but in poor condition
Visual garbage	Many
Form of ownership	State, Ministry of Natural Resources
Availability of existing tours	No
Object state (Conclusions)	A popular place for day trips, picnics, camping and koumiss cure. Lots of new seating areas. Chaotic development and land use of the territory of the national park, non-compliance with sanitary standards. Lots of visual debris and debris along the track.
Recommendations	Improve street navigation to and within the facility, organize interactive information stands, organize car and bicycle parking, install high-quality wooden benches and picnic tables, develop building and land use rules for the rational use and preservation of the natural landscape from negative anthropogenic impact.

Destination	KYRGYZ-ATA NATIONAL PARK
Location	Nookat district
Type of destination	Nature Park
Seasonality	May-October
Distance from Osh city	40 km
Distance from the district center	25 km
Altitude above sea level	2000 - 2400 m
General plan of the territory	Absent (not publicly available)
Landscaping	Natural
Availability of vehicles	Unpaved roads
Bike transport availability	No
Car parking	No (Chaotic parking)
Bike parking	No
Parking for buses	No (no specialized parking)
Inclusiveness of the territory	Don't have
Paving of the territory	Different types of stones, asphalt are applied
Lighting	Yes
Water supply	No
Sewage system	No
Drainage	No
Benches	Have, but in poor condition
Bins/Trash cans	Yes
Awnings	-
Recreation areas	Yes
WC	Have, the street toilets are in poor condition
Navigation (Pointers)	Insufficient, inconspicuous and uninformative
Information stand	Have, but in poor condition
Visual garbage	Many
Form of ownership	State, Ministry of Natural Resources
Availability of existing tours	Yes
Object state (Conclusions)	Popular place for day trips, picnics, camping. Lots of new seating areas. Lots of rubbish bins, variety of fauna and flora. Buildings are chaotic, there is no single architectural style, which often spoils the natural and architectural ensemble of the park. Lots of visual debris and debris along the track. Bad toilets.
Recommendations	Improve street navigation to and within the facility, organize interactive information stands, organize car and bicycle parking, install high-quality wooden benches and picnic tables, develop building and land use rules for the rational use and preservation of the natural landscape from negative anthropogenic impact.

Destination	CHILDREN'S CAMP "CHARBAK"
Location	Aravan district, Aravan village
Type of destination	Cultural and recreational
Seasonality	May-September

Distance from Osh city	28 km, 1 hour
Distance from the district center	2 km
Altitude above sea level	800 m
General plan of the territory	Absent (not publicly available)
Landscaping	Yes (flowers, trees)
Availability of vehicles	Have, within the boundaries of the locality
Bike transport availability	Yes
Car parking	Yes
Bike parking	Don't have
Parking for buses	Yes
Inclusiveness of the territory	Don't have
Paving of the territory	Yes, asphalt pavement
Lighting	Yes
Water supply	Yes
Sewage system	No
Drainage	Yes
Benches	Have but in poor condition
Bins/Trash cans	Have but in small quantities
Awnings	Yes
Recreation areas	Yes
WC	There are street toilets in very poor condition
Navigation (Pointers)	No
Information stand	No
Visual garbage	No
Form of ownership	Private (Trade Union)
Availability of existing tours	No
Object state (Conclusions)	There is no infrastructure, no concept and integral development of the territory. At the moment, there is very low potential to attract the attention of the tour operator and tourists. Through the territory of the camp, transit is carried out to the Chil-Ustun cave .
Recommendations	Increase and strengthen human and infrastructural potential. Tidy up the territory, create basic conditions for leisure and recreation, with an emphasis on serving the local community and local tourists.

Destination

PANORAMIC CAFE "LITTLE PARIS"

Location	Osh city, On-Adyr locality
Type of destination	Gastrotourism
Seasonality	Warm season (March-October)
Distance from Osh city	-
Distance from the district center	5 km
Altitude above sea level	1200 m
General plan of the territory	Yes

Landscaping	Yes
Availability of vehicles	Yes
Bike transport availability	No
Car parking	Yes
Bike parking	Don't have
Parking for buses	Don't have (no specialized parking)
Inclusiveness of the territory	No
Paving of the territory	Paving stones, concrete
Lighting	Yes
Water supply	Yes
Sewage system	No
Drainage	No
Benches	Yes
Bins/Trash cans	Yes
Awnings	Yes
Recreation areas	No
WC	No
Navigation (Pointers)	No
Information stand	No
Visual garbage	No
Form of ownership	Private
Availability of existing tours	The location is used by local tour operators to organize evening promenades for guests of Osh.
Object state (Conclusions)	The destination is a terraced building with a view of Sulaiman-Too and its surroundings. The content filling of the territory, landscaping in general, needs to be improved.
Recommendations	The facility is in need of modernization. It is also necessary to improve the landscaping of the territory, organize navigation both outside and inside the facility. Organize lighting, installation of high-quality and anti-vandal hardscapes and WC repair.

Destination

RICE MILL (UZGEN)

Location	Uzgen district, a neighborhood of Uzgen city
Type of destination	Cultural (educational) tourism
Seasonality	Year-round
Distance from Osh city	70 km
Distance from the district center	10 km
Altitude above sea level	1000 m
General plan of the territory	No
Landscaping	Yes
Availability of vehicles	Yes
Bike transport availability	Don't have
Car parking	Yes
Bike parking	No

Parking for buses	Don't have (no specialized parking)
Inclusiveness of the territory	No
Paving of the territory	Compacted soil, crushed stone
Lighting	Yes
Water supply	Yes
Sewage system	No
Drainage	No
Benches	Yes
Bins/Trash cans	Yes
Awnings	Yes
Recreation areas	Yes
WC	No
Navigation (Pointers)	No
Information stand	No
Visual garbage	No
Form of ownership	Private
Availability of existing tours	Yes
Object state (Conclusions)	The location is an old wooden mill equipped to process red rice using ancient technologies. A visit to the site is an integral part of tours organized to familiarize tourists with the technology of growing and processing local rice.
Recommendations	On the way to the object (for example, in the center of Uzgen), it is necessary to install navigation signs for the object. It is required to finalize the content of the territory, general improvement, including the installation of a WC.

Destination

TOS SARY-MOGOL (TULPAR-KUL)

Location	Chong-Alay district
Type of destination	mountaineering, trekking, ethnotourism
Seasonality	summer
Distance from Osh city	220 km (3 hours 20 minutes)
Distance from the district center	-
Altitude above sea level	3,500
General plan of the territory	Absent (not publicly available)
Landscaping	-
Availability of vehicles	unpaved road
Bike transport availability	No
Car parking	Don't have (no specialized parking)
Bike parking	No
Parking for buses	Don't have (no specialized parking)
Inclusiveness of the territory	No
Paving of the territory	No
Lighting	No
Water supply	Yes
Sewage system	No

Drainage	No
Benches	No
Bins/Trash cans	Yes
Awnings	No
Recreation areas	No
WC	Yes (improvements required)
Navigation (Pointers)	No
Information stand	Yes
Visual garbage	Yes
Form of ownership	Municipal
Availability of existing tours	Yes
Object state (Conclusions)	It has a great potential for development thanks to an interesting and fascinating natural landscape. Located near well-established tourist routes. It is required to study zoning and rational use of the territory. Infrastructural improvements are needed.
Recommendations	Improve the conditions for staff and the place where food is prepared and served. Improve sanitary conditions and bring them in line with environmental standards. Encourage the use of renewable energy technologies for electricity generation and water heating, improve navigation to and within the facility, update and improve information stands, leave high-quality and anti-vandal hardscapes.

Destination

ECO-FARM "ALAYKUU"

Location	Kara-Kulja district
Type of destination	Ecotourism, ethnotourism, kumys treatment
Seasonality	May-September
Distance from Osh city	175 km
Distance from the district center	100 km
Altitude above sea level	2500 m
General plan of the territory	Absent (not publicly available)
Landscaping	Don't have
Availability of vehicles	Gravel coating
Bike transport availability	No
Car parking	No
Bike parking	No
Parking for buses	Don't have (no specialized parking)
Inclusiveness of the territory	No
Paving of the territory	Different types of paving are used: stones, paving stones
Lighting	No
Water supply	Yes
Sewage system	Don't have (local toilet septic)
Drainage	No
Benches	No
Bins/Trash cans	Yes
Awnings	No
Recreation areas	Yes

WC	Yes
Navigation (Pointers)	Insufficient, inconspicuous and uninformative
Information stand	Yes
Visual garbage	No
Form of ownership	Private
Availability of existing tours	-
Object state (Conclusions)	An area with a beautiful natural mountain landscape. A hard-to-reach place, the area is not yet oriented for tourist services. Road infrastructure is available only in settlements, in uninhabited areas there are gravel roads. In general, there is potential for the development of eco and ethno-tourism, but so far it is losing in popularity, accessibility and content component to other destinations.
Recommendations	Development of new tourist trekking routes for the purpose of providing tourist content to the Alaykuu mountain valley. Attracting investments in the development of infrastructure and in training the local community in the basics of ecotourism.

Appendix 1c. Methodology for destination prioritization

The proposed methodology allows prioritizing the pilot tourist destinations of the Osh Region, selected for the *field study*.

Structurally, it consists of two stages. **At the first stage**, the state of the destinations was diagnosed according to the factors "Management", "Economy", "Culture" and "Ecology". For this, the project team conducted the field study at 14 pilot tourist destinations. The main task here was a comprehensive analysis of the current state of the objects under consideration through an audit of the functioning of the above factors. Within its framework, locations were evaluated through all their constituent components on a point scale from "0" to "5". It was assumed that for any component "0" means "not available", "1" - "poor condition", "2" - "below average condition", "3" - "average condition", "4" - "above average condition" and "5" for "excellent condition". Scores were awarded based on the profile description of each destination.

"Management" factor. Table 18 shows the results of assessments of 14 tourist destinations by the components of the "Management" factor. On it one can see which objects received what score on the scale defined above. For example, for the component *"Interaction with the Tourism Development Councils under the Osh Mayor's office and the PRP KR in Osh province"* 7 objects received a rating of "0" (there is no interaction with the Councils), 2 sites - "4" (the state of interaction is above average) and 5 sites - "5" (excellent status of the interaction).

Table 18. Estimates of the components of the "Management" factor

No.	Components	Points					
		"0"	"1"	"2"	"3"	"4"	"5"
		Number of objects					
1.	The presence of a person responsible for the object in the administration	5	0	0	0	2	7
2.	Interaction with the Tourism Development Councils under the Osh Mayor's office and the PRP KR in Osh province	7	0	0	0	2	5
3.	The readiness of the administration to help with the construction of the road	6	0	1	0	1	6

4.	The readiness of the administration to help with the supply of communications (water, electricity, etc.)	3	1	0	3	4	3
5.	Ensuring public safety	1	0	2	3	0	8
6.	The attitude of the local population to the object, plans for its development	1	0	0	1	1	11
7.	Sustainable management team	0	0	0	0	2	12
8.	Strategic plan for the development of the location	0	0	3	1	1	9
9.	The team is in constant contact with the administration, aksakals of local communities	1	0	0	1	3	9
10.	The team preserves the institutional memory of the object	0	0	0	1	1	12
11.	Availability of object passport	4	0	0	1	1	8
12.	Land and property relations are regulated Urban planning	0	0	0	2	1	11
13.	Opportunities for first aid	3	0	1	3	3	4
14.	Conditions for persons with disabilities	13	0	0	1	0	0

"Economy" factor. Table 19 presents the assessments of tourist sites in terms of the components of the "Economy" factor.

Table 19. Estimates of the components of the "Economics" factor

No.	Components	Points					
		"0"	"1"	"2"	"3"	"4"	"5"
		Number of objects					
1.	Object state	0	0	1	7	4	2
2.	Logistics stability	1	0	1	6	4	2
3.	Paved road, there is a parking lot	0	0	5	1	4	4
4.	Access to running water or drinking water delivery	3	0	0	2	3	6
5.	Access to electricity or a generator	2	0	0	2	3	7
6.	Access to comfortable toilets or dry closets	4	0	4	3	1	2
7.	Access to mobile communications and the Internet	1	1	1	0	6	5
8.	Availability of places of rest/accommodation	3	1	1	2	1	6
9.	Availability of catering places	4	1	1	3	0	5
10.	Cooperation with local agricultural producers	5	1	1	2	2	3
11.	Cooperation with artisans	8	2	1	1	1	1
12.	Tourist attraction (legends, stories)	1	1	1	0	4	7
13.	Tourist demand from local residents	0	0	0	2	4	8
14.	Tourist demand from residents of other regions of the Kyrgyz Republic (number)	2	0	1	1	5	5
15.	Tourist demand from foreigners (from where, number)	3	0	0	2	4	5
16.	Information about the object in tourist guides	2	0	3	2	2	5
17.	Information on the Internet, social networks	1	0	3	2	3	5

"Culture" factor. Table 20 shows the assessments of tourist sites in terms of the components of the "Culture" factor.

Table 20. Estimates of the components of the "Culture" factor

No.	Components	Points					
		"0"	"1"	"2"	"3"	"4"	"5"
		Number of objects					
1.	System of assessment, restoration and preservation of cultural property	5	0	1	3	2	3
2.	Protection of intangible cultural heritage	3	0	2	3	3	3
3.	Visitor management system	5	1	1	2	2	3

"Ecology" factor. Table 21 contains assessments of tourist sites by the components of the "Ecology" factor.

Table 21. Estimates of the components of the "Ecology" factor

No.	Components	Points					
		"0"	"1"	"2"	"3"	"4"	"5"
		Number of objects					
1.	Monitoring the impact of tourism on the environment	8	0	0	2	1	3
2.	Rational water use	4	1	1	0	2	6
3.	Use of renewable energy sources	11	0	0	0	0	3
4.	Maintenance of sewage and discharges from septic tanks	8	2	1	1	0	2
5.	Separate waste collection containers	11	0	1	2	0	0

At the **second stage** desk research on the basis of the points given, the Priority Index was calculated based on the totality of all factors (I) using the well-known in applied mathematics method of weighted average estimates ³¹:

$$I = \sum_{i=1}^4 (\lambda_i * I_i) / \sum_{i=1}^4 \lambda_i \quad (1)$$

In this case, the following designations are introduced in formula (1):

- I_1 - Index of priority by the factor "Management";
- I_2 - Index of priority by the factor "Economy";
- I_3 - Index of priority by the factor "Culture";
- I_4 - Index of priority on the factor "Ecology";
- λ_1 - the weight of the "Management" factor, the degree of its influence was estimated at 25%;
- λ_2 - the weight of the "Economics" factor, the degree of its influence was estimated at 25%;
- λ_3 - the weight of the "Culture" factor, the degree of its influence was estimated at 35%;
- λ_4 - the weight of the "Ecology" factor, the degree of its influence was estimated at 15%.

³¹ The weighted average estimation method is a mathematical formula that allows determining the average value of the components taking into account the weight (significance) of each of them. In this case, the weights are evaluated as a percentage, as a share of the impact on the final result.

It should be noted that the values of the priority indices I_1, I_2, I_3 и I_4 were calculated using the method of weighted average estimates of the components of each factor, or rather, the points they received during the field study. Their specific number and values are indicated in the tables above. By analogy with the Priority Index by aggregate factors (I), their formulas are as follows:

Priority index by the "Management" factor:

$$I_1 = \sum_{i=1}^{14} (\lambda_{1i} * I_{1i}) / \sum_{i=1}^{14} \lambda_{1i} \quad (2)$$

The weights « λ_{1i} » for the 14 components of the "Control" factor are shown below.

The value of the weights for the components of the "Management" factor														
"i" (unit)	1	2	3	4	5	6	7	8	9	10	11	12	13	14
« λ_{1i} »(%)	6	7	7	7	8	7	9	7	7	8	7	7	7	6

And the index of priority by the "Economy" factor:

$$I_2 = \sum_{i=1}^{17} (\lambda_{2i} * I_{2i}) / \sum_{i=1}^{17} \lambda_{2i} \quad (3)$$

The weights for the 17 components of the "Economy" factor are shown below « λ_{2i} ».

The value of the weights for the components of the "Economy" factor																	
"i" (unit)	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
«λ _{2i} »(%)	8	6	4	4	4	10	8	5	5	5	5	10	5	4	5	6	6

Priority index by the "Culture" factor:

$$I_3 = \sum_{i=1}^3 (\lambda_{3i} * I_{3i}) / \sum_{i=1}^3 \lambda_{3i} \quad (4)$$

The values of weights for 3 components of the "Culture" factor are shown below « λ_{3i} ».

The value of the weights for the components of the "Culture" factor			
"i" (unit)	1	2	3
« λ_{3i} »(%)	40	35	25

Priority index by the "Ecology" factor:

$$I_4 = \sum_{i=1}^5 \lambda_{4i} * I_{4i} / \sum_{i=1}^5 \lambda_{4i} \quad (5)$$

The weights for the 5 components of the "Ecology" factor are shown below « λ_{4i} ».

The value of the weights for the components of the "Ecology" factor					
"i" (unit)	1	2	3	4	5
« λ_{4i} »(%)	10	10	25	30	25

Table 22 shows the final values of the Priority Indices I_1, I_2, I_3 и I_4 , calculated, respectively, by formulas (2), (3), (4), (5).

Table 22. Rating of pilot tourist sites of the Osh Region

	"i"	1	2	3	4	Total
	« λ_i »	25.00	25.00	35.00	15.00	100.00
No.	Name	I ₁	I ₂	I ₃	I ₄	I
1	Kurmanjan-Datka Museum (Alay)	4.6	3.8	5.0	1.0	4.0
2	Sulaiman-Too (Osh)	4.4	3.3	5.0	0.3	3.7
3	CBT Sary-Mogol (Alay)	2.9	3.9	5.0	0.5	3.5
4	Rice mill (Uzgen)	2.9	2.8	3.8	4.5	3.4
5	Eco-farm Alayku (Kara-Kulja)	3.5	4.5	2.1	4.5	3.4
6	Waterfall Abshyr-Ata (Nookat)	3.6	3.0	3.4	0.9	3.0
7	Duldul-At (Aravan)	4.1	3.6	2.6	0.9	3.0
8	Fortress Kul-Datka (Chong Alay)	4.0	2.7	3.7	0.0	2.9
9	Uzgen complex	4.6	3.4	2.5	0.0	2.9
10	Rayan Eco Resort (Alay)	2.3	4.5	0.7	3.0	2.4
11	Kara-Shoro National Park (Uzgen)	2.7	1.5	2.0	1.7	2.0
12	Panorama "Paris" (Osh)	4.2	2.1	0.0	0.0	1.6
13	Kyrgyz-Ata National Park (Nookat)	3.0	2.6	0.0	1.0	1.5
14	Children's camp in the Charban (Aravan)	2.4	2.9	0.0	0.4	1.4

Appendix 1d. Information about the STDSP Working Group

The Coordinating Working Group for the development of the Sustainable tourism development Strategy and Plan for the Osh Region:

1. Razhiev A.R. - team leader of the STDSP project;
2. Zhunusov A.K. - deputy team leader
3. Nizamiyev A.G. - dean of the Faculty of Natural Science, Geography and Tourism of Osh State University;
4. Rakhmanova A.A. - head of the Social Department of the PRP KR in Osh province;
5. Orozaliev M. - head of the International Department of the Osh Mayor's Office;
6. Aliyev A. - director of the "Destination Osh";
7. Ismanov A. - local historian, author of the website "Incredible Osh";
8. Kenzhematova K. - Deputy Director of the Department of Tourism under the Ministry of Economy and Commerce of the Kyrgyz Republic;
9. Usubaliev M. - advisor to the Tourism Development Support Fund of the Kyrgyz Republic.

Appendix 2a. List of the main problems of the Osh Region tourism sector

PR1.	In the Osh Region, there is no coordinated strategic planning process for tourism development, not all programs for socio-economic development of districts contain sections on tourism development, most local councils do not include in the plans for pasture management areas for the use of tourism and recreation of citizens.
PR2.	The current system of tourism statistics is based on the assessment of basic indicators, which is not enough for high-quality monitoring of the sector development and making systemic management decisions.
PR3.	Constant changes in the structure of the Department of Tourism lead to unsustainable institutional support for the tourism sector by the state.
PR4.	There is only one officer responsible for tourism issues at all levels of the executive branch in the Osh Region, who is also responsible for other issues of socio-economic development.
PR5.	The system of public authorities has not yet developed a comprehensive vision for the development of the tourism sector, taking into account the need for an intersectoral general economic nature of promoting the industry.
PR6.	Not all organizational units authorized for tourism development in local administrations properly perform the role of curator to support and develop the activities of tourism sector entities. In other words, some destinations do not have administrative support from their side.
PR7.	The readiness of administrations to help with laying communications and building roads does not always coincide with the actual plans for their implementation. This indicates a low level of involvement of all stakeholders in decision-making on the infrastructure development of destinations.
PR8.	The process of tourism promotion has generally weak institutional support and does not correspond to the status of this industry as a priority sector of the economy.
PR9.	The activities of tour operators are not recognized as exporters of services and are highly taxed. In this regard, the activities of a significant share of regional operators continues to belong to the shadow economy.
PR10.	There is a notification procedure for passing the Kyrgyz-Tajik border for citizens of third countries.
PR11.	Most of the accommodation facilities in the region have a mediocre quality of service, due to the low level of staff training and high staff turnover.
PR12.	Many owners of accommodation facilities lack an understanding of the importance of destination marketing, including through modern digital tools (websites, social networks, booking systems).
PR13.	In most sanatorium-and-spa institutions of the region, there is a low quality of services provided, due to their weak or outdated material and technical equipment.
PR14.	The work of many sanatorium-and-spa institutions is seasonal, which is explained by the lack of profiling of these institutions and the weak introduction of the latest biomedical developments.
PR15.	A serious obstacle hindering the sustainable development of many tourism enterprises, especially in remote mountainous areas of the region, is the seasonal nature of the business (many enterprises are forced to stand idle in the winter and off-season).
PR16.	There is a low rate of digitalization. The majority of catering outlets in Osh Region, especially in small towns and rural areas, do not have food delivery services.
PR17.	There is a shortage of trained professionals, especially it is difficult to find cooks. At the same time, many businesses do not pay proper attention to training and retraining of staff.

PR18.	There is a low corporate culture of tour operators, due to the lack of understanding of the importance of strategic planning and institutional promotion of public interests.
PR19.	There are no transparent and de-bureaucratized regulations for the interaction of the Tourism Development Councils operating in the region with each other and with the subjects of the tourism sector.
PR20.	The norms of the Tax Code of the Kyrgyz Republic are not very burdensome for the tourism sector, except for the catering industry, where the tax rate of 8% of turnover in the most commonly used by entrepreneurs tax regime "single tax", which is considered to be a fairly high tax rate.
PR21.	The Law of the Kyrgyz Republic "On Tourism" was considered progressive for 1999, but its norms are behind the times.
PR22.	The Law of the Kyrgyz Republic "On Pastures" does not allow transferring land plots of pastures for other purposes (tourism and recreation) for more than 5 years, which is not enough for the sustainable development of the tourism business.
PR23.	The Laws of the Kyrgyz Republic "On Renewable Energy Sources" and "On the Park of Creative Industries" were adopted relatively recently and the mechanisms for their implementation have not yet been fully developed.
PR24.	The Law of the Kyrgyz Republic "On Local State Administration and Local Self-Government Bodies" assigns many important powers for tourism development to local self-governments, but most of them are not implemented in practice due to insufficient funds in local budgets.
PR25.	The current regulatory legal environment is not sufficiently favourable for tourism development as a priority sector of the national economy.
PR26.	There is still a shortage of qualified teaching staff in the tourism sector of the country.
PR27.	There is a shortage of guides, tour guides, account managers, sales and marketing managers, tourism agents, interpreters.
PR28.	The tourism sector of the Osh Region suffers from high staff turnover, which has a negative effect on the preservation of institutional memory and leads to a deterioration in the quality of services provided.
PR29.	In all subsectors of the tourism industry, there is a weak managerial level, accompanied by a low corporate culture and a weak level of professional and language training of employees.
PR30.	The financial literacy of entrepreneurs (in drawing up business plans, knowledge of business lending opportunities and fundraising) who want to develop the tourism business remains at a low level.
PR31.	The human resourcing of the tourism industry remains at a low level.
PR32.	Many tourist destinations lack feedback mechanisms to take into account the opinion of the population on their development. Only professional and experienced teams understand the importance of taking into account the opinion of the local population in the sustainability of destinations.
PR33.	The absence of norms and professional standards governing the activity of guides and instructors of adventure tourism creates a high risk of accidents.
PR34.	The ability of government agencies to provide rescue services on difficult mountain routes remains largely limited due to the lack of highly qualified rescuers and the shortage of helicopter fleet.
PR35.	Rescue services of independent organizations are highly dependent on the financial and insurance capabilities of tourists.

PR36.	Operational duty officers of the MES can only explain themselves in Kyrgyz and Russian languages, which is not enough to ensure the safety of foreign tourists, there is no English-language page on the website of the Ministry.
PR37.	There are no norms and protocols to ensure the safety of tourists in destinations, especially in adventure tourism. There are no clear and binding algorithms for providing emergency assistance to travelers.
PR38.	There are no specialized educational institutions and training programs for museum workers and cultural guides in Kyrgyzstan, which leads to low tourist attractiveness of museums in the Osh Region.
PR39.	There is a weak material and technical base and infrastructure of museums which is reflected in dilapidated (the premises need repair, refurbishment of surrounding areas) and outdated (no elevators, ramps, etc.) infrastructure.
PR40.	Marketing promotion of museums in the region leaves much to be desired. Museums work poorly in social networks, do not have Internet sites, do not offer information in foreign languages, are poorly oriented towards the use of interactive approaches (audio-video materials, virtual tours), do not actively promote their own attributes (souvenirs, booklets, brochures, etc.).
PR41.	Museums of the Osh Region have very limited opportunities for self-development. They cannot engage in commercial activities (renting premises for the opening of coffee shops, specialized souvenir shops/bookstores), museum employees do not have flexible working hours.
PR42.	Many regional museums do not meet the norms for the evaluation, restoration and preservation of cultural property, which is due to poor training of personnel, as well as the financing of the cultural sphere on the residual principle.
PR43.	Many destinations in the region do not meet norms for the protection of intangible cultural heritage, as well as visitor management standards, which could reduce the burden on their already weak capacity to assess, restore, and preserve cultural property.
PR44.	The Osh Region currently does not have a well-established positive image and recognition in the global tourism market. There is no single marketing package to promote the region in the tourism market.
PR45.	Some tourist destinations in the region lack or have poor access to mobile communications and the Internet. This, to some extent, explains the lack of information about them in social networks.
PR46.	The lack of tourist demand for destinations in the Osh Region, both among residents of other regions of the country and foreigners, is explained by the low quality of the information provided or its absence on the Internet, social networks and tourist guides, which also indicates their weak customer focus.
PR47.	The Osh Region's tourist destinations make little use of legends and stories to increase tourist demand, despite the fact that literally all of Kyrgyzstan is studded with sacred places.
PR48.	In the Osh Region, environmental problems caused by the consumer attitude towards nature, when economic interest "overrides" the implementation of the Law of the Kyrgyz Republic "On Environmental Protection" of June 16, 1999, are exacerbated.
PR49.	There is no permanent monitoring of environmental conditions and there is weak interagency cooperation on environmental issues due to the low level of awareness of state and municipal employees on environmental problems.
PR50.	PR50. Having an orographically complex territory, the nature of the Osh Region is exposed to stronger anthropogenic impacts and consequences of global climate change. First of all, it concerns melting of glaciers of Pamir-Alay, soil erosion and degradation of ecosystems.

PR51.	The current system for monitoring the impact of tourism on the environment does not cover all tourist destinations with a systematic environmental audit, and also does not fully measure all aspects and indicators of green economy.
PR52.	Even with at least an average level of access to running water and electricity, most of the tourist destinations in the region do not have a culture of providing tourists with modern toilets.
PR53.	In destinations, there is a generally unfavorable situation with the disposal of household waste and the maintenance of sewage.
PR54.	Some tourist destinations do not have electricity, and as a result they are forced to use diesel and gasoline generators, further polluting the environment.
PR55.	The introduction of "green" technologies, despite the adoption of strategic documents and legal acts, is slow. In particular, renewable energy sources are currently not used even by 1% in Kyrgyzstan as a whole.
PR56.	A noticeable obstacle to the implementation of the principles of green economy in the region is the low environmental awareness of the population, state bodies and representatives of the tourism industry about advanced technologies and financial instruments for their implementation.
PR57.	The bus stations in Osh are in poor condition. Among their shortcomings are the poor quality of paving and road surface, lack of customer-oriented and inclusive infrastructure (poor navigation, non-working toilets, lack of benches and hardscaping).
PR58.	Public transport means (minibuses, cars) mostly do not meet international safety and environmental standards.
PR59.	In the cities of the Osh Region, the issues of organizing parking spaces have not been regulated. Chaotic parking has a negative impact on urban mobility and street traffic.
PR60.	The quality of sidewalks and, in general, the pedestrian infrastructure in the cities of the region leaves much to be desired.
PR61.	There is a poor quality of regional and local roads to tourist destinations and the scarcity of roadside infrastructure - the lack of navigation in foreign languages and rest points with comfortable and inclusive toilets, Internet access, charging stations for gadgets and tourist information stands.
PR62.	Lack of institutional and infrastructural capacity of the airport limits the attraction of new airlines, including European ones.
PR63.	The Osh-Bishkek route is served by an outdated aircraft fleet. The limited choice of air carriers and high demand often lead to a shortage of air tickets on the route.
PR64.	There are disruptions to air travel services in harsh climatic conditions, especially during dense fog.
PR65.	Low level of customer orientation of the airport: long check-in and passport control, limited possibility of cashless payments, poor outdoor navigation, poor condition of toilets and air conditioning systems of the airport, weak sound alerts.
PR66.	Lack of luggage storage facilities in case of flight cancellations and delays inconvenience airport visitors.
PR67.	Lack of special parking for tourist buses at the airport.
PR68.	The airport lags behind in terms of ensuring inclusiveness, there are no elevators for the safe and comfortable service of visitors with limited mobility who are not able to get on and off the plane by themselves.
PR69.	Issues of integrated planning and integrated infrastructure management in the Osh region are poorly developed.

Appendix 2b. Methodology for problem prioritization

The level of priority of the detected problems is determined by assessing their level of influence on each other. In other words, the more separate problems are removed when solving a problem, the more weighty it is, and therefore the higher the priority.

The influence of problems on each other can be assessed through their "outgoing" and "incoming" connections. "Outgoing" for a problem are those connections that allow influencing the partial or complete solution of other problems. At the same time, "Incoming" are those connections in which the settlement of other problems affects the partial or complete solution of the problem. In this case, the priority rating is determined through the difference between the number of "outgoing" and "incoming" connections of a particular problem. The problem for which this difference has the maximum value is considered the highest priority, and the minimum value is considered the least priority. To illustrate this, let us present it in the form of a diagram, where there are three problems, conventionally designated as X, Y, Z.



PRIORITIZATION OF PROBLEMS	
Prioritization results	
1.	Problem Y is the winner of the first place because it has more outgoing connections (2 arrows) compared to incoming connections (1 arrow), that is, the result was formed by the difference between outgoing and incoming connections and was equal to 1.
2.	Problem X is the winner of the second place, which also resulted from the difference between outgoing and incoming connections, that is, it was equal to 0. As shown in the figure, X and Y have equal influence on each other.
3.	Problem Z is the third place winner with a score of -1. Since there is one incoming connection to this problem and there is no outgoing connection, it does not have an impact on any problem.

Suppose, the solution of problem Y affects the solution of problems X and Z, and the solution of problem X affects the solution of problem Y. In this case, the highest priority becomes problem Y, and the lowest becomes problem Z.

Prioritization of problems is carried out through assessments of the level of influence of problems on each other. Hierarchization of problems is carried out according to the principle "the more problems are removed when solving a problem, the more weighty and prioritized this problem is".

Table 23 shows the calculation of the priority rating of problems X,Y, Z. In the junction cells through "1" is reflected the impact from the solution of one problem on the solution of another problem, and through "0" - the absence of such an impact.

Table 23. Problem prioritization method in tabular form				
Problems	Y	X	Z	Outgoing connections
Y	1	1	1	2
X	1	0	0	1
Z	0	0	-1	0
Incoming connections	1	1	1	

In this case, the number of "outgoing" links for each problem is counted in the rightmost column of the table, and the number of "incoming" connections - in the bottom row. The place in the priority rating of each problem is estimated in the diagonal cells of the table through the difference between the number of "outgoing" connections and the number of "incoming" connections. In our case, it is necessary to prioritize seven problems identified as root-cause problems.

Table 24. List of root-cause problems (PPs) of the regional tourism sector

No.	Root-cause problems
1.	Current regulatory legal environment is not sufficiently favorable for tourism development as a priority sector of the national economy
2.	The tourism promotion process has weak institutional support:
3.	Issues of comprehensive planning and integrated infrastructure management in the Osh Region are poorly developed
4.	Low level of the popularity of green economy principles, and their poor implementation in practice.
5.	The Osh Region is poorly promoted in terms of marketing.
6.	Human resourcing in the tourism industry remains at a low level.
7.	Financing of the regional tourism sector, despite the declared priority, continues to be carried out on the leftover principle.

The prioritization of the root-cause problems of the Osh Region's tourism sector based on the proposed methodology will look as shown in Table 25. On the diagonal cells, taking into account the assessment of "outgoing" and "incoming" connections of each of the root-cause problems of the sector, the final rating of their prioritization is indicated.

Table 25. Problem prioritization method for the Osh Region's tourism sector								
Name	PP1.	PP2.	PP3.	PP4.	PP5.	PP6.	PP7.	Outgoing connections
PP1.	2	1	1	1	0	1	1	5
PP2.	1	2	1	1	1	1	1	6
PP3.	0	0	-4	1	1	0	0	2
PP4.	1	1	1	0	1	1	1	6

PP5.	0	0	1	1	-1	1	1	4
PP6.	1	1	1	1	1	2	1	6
PP7.	0	1	1	1	1	0	-1	4
Incoming connections	3	4	6	6	5	4	5	

Appendix 2c. Methodology for targets forecasting

The definition of targets for the regional tourism sector is based on the forecast of a number of indicators characterizing the development of the sector until 2028.

The methodology for forecasting target indicators is based on the use of *extrapolation methods*, in which historical sequences, trends (statistical data) are projected onto future periods. One can conditionally divide them according to the level of complexity into methods of simple and debugged extrapolation. Causal methods are based on mathematically expressed relationships between the indicators under consideration.

Simple extrapolation methods are a group of forecasting approaches using a simple mathematical projection and are usually the most effective for making short-term forecasts. Simple extrapolation methods are also often referred to as single-factor methods because they are used to predict a single factor over time and are a time series model. The most common method is the so-called "*no change*" method, which, despite the name, often gives the best forecast in the short term.

Typically, tourism demand is affected by both short-term and long-term trends, as well as other factors. In addition, so-called atypical events often influence changes in tourist demand. Their impact can be leveled within the framework of simple methods using *the simple moving average extrapolation method* (the SMA method, an average value calculated for a certain number of time intervals preceding the observed one).

The latest collected data are of the greatest value for forecasting the future, while "old" data (20 years ago or more) are of less importance, and therefore, the likelihood that they will help in making a future forecast is negligible. Therefore, to solve the problem, either the method of extrapolation of a simple moving average according to the data of only recent years, or *the method of exponential smoothing* is used, where instead of a simple average, recent data have more weight, and older ones have less weight. This method is also widely used in the practice of tourism forecasting and works well for short-range forecasts.

In accordance with the methodology of tourism statistics by the NSC KR, the main indicators of tourism development are formed based on the results of statistical observation of tourist flows, places of their accommodation, travel characteristics, wholesale and retail trade, transport, construction, employment, financial intermediation, income and expenses related to tourism, based on a unified scientific methodology that complies with international rules and standards.

To make a forecast for the tourism development, its main indicators were taken. At the same time, it is important to note that tourism statistics are published by the NSC KR annually in July. Therefore, data for 2022 will only be available in Q3 2023. For this reason, data for the period 2017 to 2021 were used for this forecast. It is also worth noting that for the 2020 and 2021 data the COVID-19 pandemic had a significant impact, which led to a drop in key indicators. In this regard, indicators for 2018 and 2019 were taken to determine the average growth rate.

At *the first stage* of forecasting the development indicators of the regional tourism sector, data were collected for the period from 2017 to 2022 according to the following indicators:

- enterprises, tourism organizations and recreation facilities (units);
- services of activities of travel agencies, KGS mln;

- services of sanatorium and resort activities, KGS mln;
- services of hotels and other places of short-term residence, KGS mln;
- the number of domestic tourists;
- the number of foreign tourists.

At *the second stage*, forecasting of target indicators was carried out using *the method of simple extrapolation by the average growth rate* based on the following formulas:

Forecast	Chain growth rate
$y_{t+1} = T_p y_t$	$T_p(t) = \frac{y_t}{y_{t-1}}$

where y_{t+1} – predicted value of the indicator, T_p – average growth rate, y_t – the actual value of the indicator under study for the current period, and y_{t-1} – the value of the indicator of the previous period.

Appendix 2d. Resolution of the joint round table of the PERETO and STDSP projects

RESOLUTION OF THE ROUND TABLE “CHALLENGES AND OPPORTUNITIES FOR INTRODUCING SUSTAINABLE PRODUCTION AND CONSUMPTION IN TOURISM DEVELOPMENT OF OSH CITY AND OSH PROVINCE”

Osh city

February 8, 2023

We, the participants of the round table: representatives of small and medium-sized businesses operating in the tourism and HORECA sectors, public organizations, city municipal enterprises, state and municipal employees responsible for environmental protection and regional development, employees of international and non-governmental organizations, university professors and teachers of Osh city and Osh province **recognize** the importance of developing sustainable tourism for our region, and at the same time **are concerned about** the scale of pollution of our ecology, climate change trends and the dynamics of expected carbon emissions in the hotel sector by 2050.

Emphasizing the importance of local and international experiences in the field of circular/green economy and sustainable production and consumption, and also **taking into account** the available opportunities for green financing for sustainable tourism and the promotion of a green economy in Kyrgyzstan, the participants of the round table heard the draft Strategy for the sustainable tourism development in the Osh Region for 2023-2028, which was voiced at the round table by the expert team, and preliminarily approved what is stated in the document.

However, this strategy requires careful coordination of actions with all interested parties, and in order to consolidate efforts to develop tourism in the region, the participants of the round table recommend taking the following measures and actions:

No.	MEASURES	ACTIONS
1	Refine and implement the STDSP in accordance with the principles of the circular economy and sustainable production and consumption:	<ul style="list-style-type: none"> ○ Take measures to reduce the anthropogenic footprint on the environment; ○ In the economic development and promotion of tourism marketing, always take into account environmental benefits; ○ Include measures for energy and resource saving as one of the priorities in the development of tourism in the Osh Region;

		<ul style="list-style-type: none"> ○ It is necessary to include a section on the development of winter tourism, despite the fact that the Osh Region cannot compete with the Issyk-Kul or Chui provinces; ○ Conduct a large-scale presentation of the tourism brand of the Osh Region and hold discussions on the tourism development program in each district of the Osh Region; ○ Include the STDSP project in the implementation plan through available funding sources (local and regional funds, state development fund, etc.); ○ Strengthen cooperation with international organizations to develop the potential of tourism.
2	Create and promote ecological tourist routes and programs that will help preserve the natural and cultural resources of the region:	<ul style="list-style-type: none"> ○ Leverage is needed to preserve historic buildings as a legacy of the culture and history of the area; ○ Develop geoparks and destinations; ○ Support local applied arts (the work of potters, needlewomen and artisans); ○ It is necessary to preserve the eastern appearance of the city of Osh, as there is a construction boom of modern buildings; ○ Compile a calendar of festivals and hold festivals of applied arts and film festivals; ○ Include measures for the disposal of solid waste from tourist sites; ○ Strengthen control over the sanitary condition of tourist facilities; ○ Create a map of tourist routes through the study of the potential of the region together with Osh State University and destinations for wider awareness, including tourists.
3	Support and develop ecotourism, agritourism and other forms of sustainable tourism that contribute to the fair distribution of tourism benefits and increase the income of the local population	<ul style="list-style-type: none"> ○ Introduce a leasing system for the installation of renewable energy sources and the development of ecotourism and agrotourism; ○ Develop year-round tourism through energy and resource-saving solutions and technologies; ○ Facilitate the provision of local products and services in tourism facilities.
4	Develop and promote sustainable tourism standards, including certification of green hotels and tourist facilities	<ul style="list-style-type: none"> ○ Implement a system and energy efficiency standards in hotels and restaurants (Class A and B in accordance with the requirements of the State Building Agency); ○ Develop Kyrgyz flavor and local values; ○ When building tourist facilities, abandon metal and cement and use natural materials; ○ When serving customers, reduce the use of plastic utensils/equipment; ○ Promote the use of ecological transport for tourism services (electric cars, gas equipment in cars, bicycles, horseback riding and walking tours)
5	Increase awareness and education of young people, local people, tourists and other stakeholders about sustainable tourism and its benefits for the economy, nature and society:	<ul style="list-style-type: none"> ○ To convey to the population full information about the possibilities of green loans from commercial banks and international projects and programs; ○ Include in the STDSP a communication strategy to inform the general public and population ○ Draw up memorandums with the media so that they not only shoot news stories, but also participate in such discussions and take action on their part; ○ The organization of circles for children on the preservation of the environment, this must be introduced to the younger generation and among young people.
6	Strengthen international cooperation in the field of	<ul style="list-style-type: none"> ○ Attract investments and financing through the programs of ARIS, KyrSEFF, BAS, etc.

sustainable tourism, exchange of experience and best practices, and create new opportunities for tourism business:	<ul style="list-style-type: none"> ○ Implement a net tourism accounting system for high-quality statistics; ○ Promote small and medium-sized businesses providing services in the tourism and HORECA sectors; ○ Develop regional cooperation in the field of tourism for the exchange of experience, capacity building and development
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The recommendations were prepared with the participation of the leadership and employees of the Department of Tourism, the Plenipotentiary Representation of the President of the Kyrgyz Republic in Osh province, the Osh Mayor's Office, Osh State University; members of the working group for the development of STDSP; representatives of commercial banks Dos Credo Bank, Kyrgyzstan; owners of hotel business and restaurants; regional tour operators, representatives of international and donor organizations - EBRD, GIZ , ARIS, Helvetas; civil society associations; and the media.

The round table was held on February 8 in Osh city within the framework of the PERETO project with the cooperation of the STDSP project (the subcomponent of ARIS Project "Regional Economic Development").

The PERETO project promotes the adoption of energy and resource efficiency and sustainable production and consumption measures among small and medium enterprises in the tourism and hospitality sectors of Kyrgyzstan, applying a systematic approach that focuses on all elements of the market ecosystem: politics, finance, communications of various market participants, consumer awareness, and also education. The project is being implemented by a consortium of partner organizations from Kyrgyzstan and Europe: American University of Central Asia (Kyrgyzstan), UNISON Group (Kyrgyzstan), Technopolis Group (Belgium), Collaborating Center on Sustainable Consumption and Production - CSCP (Germany).

Appendix 3a. Methodology for prioritizing investment projects

All priority investments will be evaluated on the basis of their ability to contribute to the achievement of STDSP goals, as well as the results and indicators specified in its monitoring and evaluation system.

The main criterion in the evaluation and selection of investment priorities will be the answer to the question “How will this activity/project contribute to the development of the regional tourism sector and the achievement of the expected results and indicators of the STDSP?” In addition, priority investments will be assessed in terms of their ability to bring visible and traceable results, compliance with the goals and objectives of the STDSP, and sustainability of development after the completion of the project.

In accordance with the Methodology for strategic planning of sustainable development, approved by the Order of the MEC KR dated August 30, 2018 No. 01, the identification and formulation of priority areas for moving towards the set goals should be carried out on the basis of identified problems, the solution of which will allow the shortest way or most likely to move towards goals.

The Priority Investment Program will include a priority list of “soft” and “hard” investments for the region (and, if necessary, soft measures for stakeholders in Bishkek) to support the implementation of the vision and vision, as well as those needed to develop new destinations and tourism products.

The following terms and definitions are used in this methodology:

Public-private partnership is the interaction of public and private partners on the issues of attracting a private partner by a public partner to the design, financing, construction, restoration,

reconstruction of infrastructure facilities, as well as to the management of existing or newly created infrastructure facilities and/or the provision of infrastructure services.

“Soft investments” are investments in projects, the purpose of which is to achieve an intangible result, and which are aimed at improving or increasing the efficiency of the company or participants, beneficiaries of the project. Soft investments can be short-term loans or grant funds.

“Hard” investments are ordinary or long-term investments in the form of loans for the implementation of specific projects with the condition of their return, and which are aimed at achieving tangible results or obtaining tangible products, such as infrastructure facilities, a building, a manufacturing plant, etc.

Tourist product - a set of services, works, goods necessary to meet the needs of a tourist during his trip. The tourist product consists of three elements: tour, additional excursion services, goods.

Profitability is a relative indicator of economic efficiency. Profitability comprehensively reflects the degree of efficiency in the use of material, labor and monetary and other resources. The profitability ratio is calculated as the ratio of profit to the assets or flows that form it. It can be expressed both in profit per unit of invested funds, and in the profit that each received monetary unit carries. Profitability rates are often expressed as a percentage.

The effectiveness of an investment project is a category that reflects the compliance of the project with the expected goals, objectives and benefits of all economic parties involved in its implementation and implementation.

The priority investment projects are identified as follows:

1) *Formation of a list of potential investment projects.* At this stage, project proposals and ideas are collected from all interested parties, including private organizations, government agencies and municipalities, tourism operators and associations, individual entrepreneurs and others. The list of investment projects will be presented according to Scheme 1 (see below). In addition, information on each investment project will be presented in the form in Scheme 3, reflecting information about the initiator company, project data, financing and other information.

2) *Preliminary (baseline) feasibility study.* For each potential project, a baseline technical and economic feasibility study should be conducted using 3-4 key investment indicators. These indicators should include criteria such as economic impact, job creation, etc. More details on the priority selection criteria are provided below. This study also includes determining a potential launch date and project timeline.

3) *Classification of investment projects.* The priority investment program will consist of different types and categories of projects, so it is necessary to qualify investment projects for the following types and categories:

3.1. Priority projects will be classified into "hard" and "soft" investments.

(1) Projects of "hard" investments aimed at the development of tourism products; projects related to the development of infrastructure (transport / movement, access, engineering and utilities), as well as tourist accommodation, etc.

(2) Soft investment projects aimed at building and developing capacity, improving the quality of service, hospitality, digitalization, etc.

3.2. The priority investment program will also be formed taking into account the determination of the level of involvement of the following types of investment sources:

1) State investment projects. This may also include projects and grants funded by international institutions and donors through public investment programs;

2) Private investment projects;

3) Projects implemented in the form of public-private partnership (PPP).

3.3. Projects can be divided into:

- 1) Short-term projects up to 3 years;
- 2) Medium-term projects for a period of 3 to 5 years;
- 3) Long-term projects over 5 years.

4) *Creation of a working group (or commission) for the selection of priorities.* An advisory body should be established to involve members of the public and key stakeholders in the selection of priority projects. This may include representatives of authorized state bodies, public organizations, tour operators and associations, LSG bodies, as well as representatives from among industry experts.

5) *Identification of priority projects.* The working group, according to the accepted criteria, ranks the projects. As part of this work, discussions should be held with all stakeholders, including potential investors, donors and development partners. Based on the results of this work, a "Bank of Priority Projects" will be formed and the final version of the Priority Investment Program is being prepared.

6) *Finalization of the Priority Investment Program.* After the final list of priority projects is formed and agreed with all key stakeholders, the Priority Investment Program will be finalized. In this case, the program should reflect the following:

- a. For selected priority projects, it is recommended to prepare a short summary describing commercial and investment attractiveness;
- b. Terms of implementation of investment projects.
- c. Offered investment packages, which can include both "hard" and "soft" investments.
- d. Identification of a potential typology of investors (international/regional/local and public/private) and/or funding sources for each investment package. This task also includes the study of potential investors and donors, their involvement, as well as preliminary negotiations and agreement with them on possible cooperation.
- e. Project budget according to Scheme 2 (see below).

The following preliminary criteria are suggested for the selection of priorities:

1) *Efficiency (profitability) of the project.* Any economic project is primarily selected in terms of profitability and profitability. This criterion will be assessed by the availability of a cost-benefit analysis of the proposed project.

2) *Contribution to the economic development of the region (district, municipality).* When evaluating projects against this criterion, it is necessary to consider factors such as job creation; tax deductions to the local budget; if this is an infrastructure project, what benefits does it bring to the population living nearby, etc.

3) *Compliance with the goals and objectives of the STDSP.* This criterion shows how the project complies with the goals and objectives of the STDSP, as well as regional and local strategies and development programs. It is also necessary to take into account what priority problems identified in the course of the situational analysis of the region's tourism sector are solved by the project.

4) *Performance and future sustainability.* It is necessary to take into account factors such as: what results the project is aimed at; its further development; the extent to which the project is able to maintain its current state under the influence of external influences.

Projects are ranked by determining weights for each criterion. When assessing, the rating of each criterion is determined, by multiplying the rating by the maximum weight, points are calculated. Then the points are summed up and the project with the maximum score comes first. Scoring is done according to the following formula: $\text{Points} = \text{rating (\%)} \times \text{maximum weight (\%)}$

Thus, the maximum weight for each criterion is determined in advance, and each project is evaluated by awarding a rating for each criterion. Using this weight, points are calculated. Then the scores of all criteria are summed up and the total score of the project is calculated.

Scheme 1. List of priority investment projects

No.	Project name	Short description	Implementation timeline	Project initiator / developer	Location, geographic coverage	Compliance with STDSP and regional strategies and programs	Availability of a business plan (including cost-benefit analysis)
13.							
14.							

Scheme 2. Budget of investment projects

No.	Project name	Total investment amount, KGS (or USD)	Applicant's own contribution	Requested funding amount	Efficiency (profitability) of the project	Source of financing
13.						
14.						

Scheme 3. Information about the investment project

Investment project of the company (name of the initiator) " _____ "		
Project name " _____ "		
No. p / p	Name of data (information)	Description of information
1.	COMPANY INFORMATION	
1.1.	Full name or full name ³²	
1.2.	Founders, shareholders, director	
1.3.	Actual address	
1.4.	Name of the person authorized to present the project	
1.5.	Current activities of the project initiator	
2.	PROJECT DETAILS	
2.1.	Project name	
2.2.	Project type/category ³³	
2.3.	Location of the project	
2.4.	Brief description of the project, including investment components of the project: 1) Hard investments 2) Soft investments	
2.5.	Sales markets (potential customers, which tourists the project is designed for, etc.)	
2.6.	Availability and number of key personnel for project implementation	
2.7.	Current project status	
3.	FUNDING INFORMATION	
3.1.	Total investment for project implementation	
3.2.	Profitability of the project and availability of cost-benefit analysis	
3.3.	Own participation of the project initiator (cash, assets)	
3.4.	Requested funding amount	
3.5.	Purpose of the proposed investment for the purchase	
3.6.	Number of new jobs created	
4.	ADDITIONAL INFORMATION	

³²It is necessary to indicate the surname, name and patronymic, if this is an individual entrepreneur.

³³You must specify the type/category of the project according to the qualifications above.

Appendix 3b. Information about investment projects

Information about "hard" investment projects

Investment project of the company "Eco House Resort " CONSTRUCTION OF THE PAMIR-ALAY SKI RESORT

No.	Name of data (information)	Description of information
1.	COMPANY INFORMATION	
1.1.	Full name	Eco House Resort LLC
1.2.	Name of the property	Alpine Dom Pamir Alay Hotel
1.3.	Founders, shareholders, director	Director - Akmatov Abdirasul Zhamshitovich
1.4.	Actual address	Osh city, 25 Amatov street
1.5.	Name of the person authorized to present the project	Akmatov Abdirasul Zhamshitovich
1.6.	Current activities of the project initiator	Development of ecological tourism in Osh province
2.	PROJECT DETAILS	
2.1.	Project name	Construction of the Pamir-Alay ski complex (the project is under implementation, see paragraph 4.2.).
2.2.	Project type/category	<p>This project is a hard investment and is aimed at developing and promoting winter tourism in the Osh Region.</p> <p>In terms of organizational participation and funding sources, this project can be implemented in the form of PPP, through bilateral development funds or through bank loans.</p> <p>The project will be implemented within 24 months (summer-autumn 2025).</p>
2.3.	Location of the project	The ski complex is located on the northern slope of the Kara-Dobo mountain at an altitude of 3,450 m above sea level, 172 km from Osh, (on the Tal dyk pass), 10 km before the village of Sary-Tash, and at a distance of 300 m from the Osh highway - Erkeshtam (part of the Pamir Highway M42).
2.4.	Brief description of the project	<p>The Osh Region has a unique location for the construction of a ski complex for the mass segment. We are talking about the Pamir Highway, located on one of the branches of the historical Silk Road, which is growing in popularity, including among foreign tourists.</p> <p>The territory for the ski base (up to 1,000 hectares) has slopes from 3,400 to 4,000 m high and a long track up to 2.5-3 km with slopes from 15 to 50 degrees. These parameters should suit tourists with varying degrees of training. The total length of the routes of the base is estimated at 25-35 km, which will make it the largest in Central Asia.</p> <p>As part of the project, it is planned:</p> <ul style="list-style-type: none"> • Construction of a year-round hotel complex (standard double accommodation with shower and toilet in the rooms, restaurant-bar, sauna-bath, equipment rental, leisure activities, etc. with an affordable pricing policy); • Construction of the cable car of the first stage, installation of snow-retaining structures; • Organization of a first-aid post, weather station, helipad, equipment rental, etc. • Creation on the basis of the complex of a children's ski school for residents of the Alay Valley (in the future).

		The ski complex has good prospects for operation in the summer season: here you can organize one-two-day excursions from Osh to the observation deck, for horseback riding, trekking, paragliding, mountain biking.
2.5.	Sales markets (potential customers, which tourists the project is designed for, etc.)	<p>The central sales market is the southern regions of Kyrgyzstan, mainly residents of the city of Osh.</p> <p>In the future, it is possible to attract tourists from the regions of the Ferghana Valley of Uzbekistan and northern Tajikistan, however, one must understand that for the time being, skiing for them (including residents of southern Kyrgyzstan) is a curiosity.</p> <p>For residents of Bishkek and Almaty (before the appearance of a direct flight from Almaty to Osh), the base is quite remote.</p> <p>For residents of Russia, coming to the base will be closer (due to a transfer from the airport) and cheaper than, for example, to Karakol, but one should take into account the rapid development and competition from the ski resorts of Krasnaya Polyana, Shereghesh, the Caucasus and Kazakhstan.</p>
2.6.	Competitors (local, regional, etc.)	The project has no competitors in the Osh region.
2.7.	Assessment of local resources	<p>Natural snow cover in this area lasts from mid-October to May. This allows you to work without additional snowmaking.</p> <p>Features of the slopes do not imply the cost of profiling the relief. There are opportunities at the invitation of specialists (from Bishkek) for the commissioning of the ski base and the organization of the hotel business.</p> <p>There is enough manpower in the Osh Region, a system has been established for the delivery of building materials for the rapid construction of the complex.</p>
2.8.	Availability and number of key personnel for project implementation	Currently, 20 people are ready to work for the implementation of the project.
3.	FUNDING INFORMATION	
3.1.	The total amount of investments for the implementation of the project at the first stage	68 KGS mln
3.2.	Profitability of the project and availability of cost-benefit analysis	up to 30%
3.3.	Own participation of the project initiator (cash, assets)	The initiator of the project has already invested about 50 KGS mln in the implementation of the project
3.4.	Requested funding amount	18 KGS mln
3.5.	Purpose of the proposed investment for the purchase	<ul style="list-style-type: none"> • Completion of the construction of a year-round hotel complex (3 stars); • Construction of 2 ski lifts (first stage); • Organization of a snow-tubing track (rolling on cheesecakes); • Acquisition of special equipment (ratrack, snowmobiles); • Acquisition of an automatic weather station and equipment of a meteorological site; • Organization of avalanche safety (involvement of specialists, identification of potential avalanche centers and the use of snow-retaining structures); • Organization of a fast food cafe for "weekend vacation" arrivals. • Acquisition of ski and tubing sets for the provision of rental services.
3.6.	Number of new jobs created	Direct (permanent) - 20, indirect - up to 100 people

4.	ADDITIONAL INFORMATION	
4.1.	Additional Indirect Benefits and Impact of the Project	The implementation of the project will have a powerful multiplier effect on the development of the Alay and Chong-Alay districts of Osh province. About a hundred new jobs will be created for young people, women, rural workers, the creative intelligentsia of the region, and the general level of well-being of local residents will increase.
4.2.	Work done to date	<p>The project began to be implemented in 2020 with the support of the EBRD and DemirBank. Since 2021, the first domed house for 14 people has been operating. Double and triple rooms have water, sewerage and hot water supply. Due to the lack of a central energy system, a solar power plant and a solar collector for hot water supply were installed, a septic tank (three-chamber) that met all environmental requirements was built.</p> <p>In 2023, it is planned to complete the construction of the second domed house, which will allow the complex to receive up to 40 tourists in total.</p>

Investment project of an individual entrepreneur A.U.Kimsanov
REVIVAL OF THE OLD TECHNOLOGY OF RICE PROCESSING
IN A RICE MILL (AKZHUVAZ)

No.	Name of data (information)	Description of information
1.	COMPANY INFORMATION	
1.1.	Full name	The farm of Kimsanov A.U.
1.2.	Founders, shareholders, director	Kimsanov Azizbek Usmanzhanovich
1.3.	Actual address	Uzgen district, Don-Bulak aiyl aimak, Rybkhoz village
1.4.	Name of the person authorized to present the project	Kimsanov Azizbek Usmanzhanovich
1.5.	Current activities of the project initiator	Cultivation of “Devzira” rice and its processing on the basis of ancient traditional technology on a rice trough (akzhuvaz).
2.	PROJECT DETAILS	
2.1.	Project name	The revival of the ancient technology of processing rice on a rice maker (akzhuvaz).
2.2.	Project type/category	<p>This project is a hard investment and is aimed at the beautification and improvement of rural areas of educational and gastronomic significance.</p> <p>In terms of organizational participation and funding sources, this project can be implemented in the form of a PPP.</p> <p>The project will be implemented within 6 months, but the destination itself is designed for the long term.</p>
2.3.	Location of the project	This historical object is located in the Uzgen district, in the Don-Bulak aiyl aimak, in the Rybkhoz village
2.4.	Brief description of the project	<p>Complex landscaping required:</p> <ul style="list-style-type: none"> • Refurbishment of the building of the rice cooker, giving it an ancient look, including the replacement of the roof; • Construction of a flat gravel road to water mill and rice fields (60 m); • Construction of a toilet and installation of a washstand; • Installation of signs • Carrying out marketing activities to promote rice products from cultivation to preparation of the national dish .
2.5.	Sales markets (potential customers, which tourists the project is designed for, etc.)	Residents of Kyrgyzstan from all regions, as well as foreign tourists (mainly from Kazakhstan, Russia).

2.6.	Competitors (local, regional, etc.)	No potential local competitors
2.7.	Assessment of local resources	The area has a material and technical base agricultural production. The local population has the skills to process rice and offer this technology to interested tourists.
2.8.	Availability and number of key personnel for project implementation	At this time, 35 people are ready to work for the implementation of the project
3.	FUNDING INFORMATION	
3.1.	Total investment for project implementation	1.7 KGS mln
3.2.	Profitability of the project and availability of cost-benefit analysis	25%
3.3.	Own participation of the project initiator (cash, assets)	0.5 KGS mln
3.4.	Requested funding amount	1.2 KGS mln
3.5.	Purpose of the proposed investment for the purchase	construction of a building and an asphalt or other level road for tourists in
3.6.	Number of new jobs created	55 people

"Recreation area" Boru-Korbos "

RECONSTRUCTION OF THE TERRAIN AROUND THE ABSHYR-ATA WATERFALL

No.	Name of data (information)	Description of information
1.	COMPANY INFORMATION	
1.1.	Full name	Recreation area "Boru-Korbos "
1.2.	Founders, shareholders, director	Imaraliev Adilbek Toktosunovich
1.3.	Actual address	Nookat district, Toolos ayil aimak, Ornok village
1.4.	Name of the person authorized to present the project	Imaraliev Adilbek Toktosunovich
1.5.	Current activities of the project initiator	Services for tourists and vacationers
2.	PROJECT DETAILS	
2.1.	Project name	Tourist reconstruction of the area around the Abshyr-Ata waterfall
2.2.	Project type/category	<p>This project is a hard investment and is aimed at beautification and improvement of local infrastructure.</p> <p>In terms of organizational participation and funding sources, this project can be implemented in the form of PPP.</p> <p>The project will be implemented within 6 months, but the destination itself is designed for the long term</p>
2.3.	Location of the project	This state facility is located in the Nookat district of the Osh region, 70 km from the city of Osh and is located in the beautiful valley of the Abshyr-Sai River, which is located at an altitude of 1500 to 2500 m above sea level.
2.4.	Brief description of the project	<p>Complex landscaping required:</p> <ul style="list-style-type: none"> • demolition of unsightly stalls, iron containers and garages; • repair of the road leading to the waterfall (5 km); • construction of a catchment structure at the foot of the waterfall from natural stone (replacement of a metal structure that violates the natural appearance of the waterfall); • construction of a car park before entering the tourist zone; • construction of an asphalt or other level road (sidewalks) for pedestrians near the waterfall and caves; • improvement of the waterfall (installation, repair of stairs, etc.);

		<ul style="list-style-type: none"> ennoblement of the cave (giving inner comfort, artistic sacral themes, etc.); installation of small architectural forms throughout the territory (benches, urns, etc.); organization designed in a single architectural style: <ul style="list-style-type: none"> barbecue-samovar zone (since everyone comes with their own food); adobe/brick/yurt houses, where local souvenirs (ceramics, brushes, beads, knives, leather, bone, fur products), products made from dried berries (dolon, etc.), herbs, local halva, dairy products (kurut etc.).
2.5.	Sales markets (potential customers, which tourists the project is designed for, etc.)	Residents of Kyrgyzstan from all regions (mainly from the southern regions), as well as foreign tourists (mainly from Uzbekistan)
2.6.	Competitors (local, regional, etc.)	The closest competitor may be Kyrgyz-Ata, which is also located in the Nookat district, 40 km from Osh
2.7.	Assessment of local resources	The area already has a certain network of material and technical base for tourist purposes: cafes, teahouses, areas for children's games, etc.; among the local population there is a certain category of people who have the skills of tourist service.
2.8.	Availability and number of key personnel for project implementation	Currently, 55 people are ready to work for the implementation of the project.
3.	FUNDING INFORMATION	
3.1.	Total investment for project implementation	4.5 KGS mln
3.2.	Profitability of the project and availability of cost-benefit analysis	15%
3.3.	Own participation of the project initiator (cash, assets)	0.5%
3.4.	Requested funding amount	4.0 KGS mln
3.5.	Purpose of the proposed investment for the purchase	purchase of natural stone and its laying, metal gratings, repair of access roads, etc.
3.6.	Number of new jobs created	Direct - 42, indirect - 210 people

Investment project of the company " Public Fund "Duldul-At"
RECONSTRUCTION OF THE HISTORICAL AREA "DULDUL-AT"

No.	Name of data (information)	Description of information
1.	COMPANY INFORMATION	
1.1.	Full name	Public Fund "Duldul-At"
1.2.	Founders, shareholders, director	Matkarimov Nurbek Tolonbekovich, Obdunov Omurzak Abdilamitovich
1.3.	Actual address	Aravan district, Aravan village, 1, Lenin street
1.4.	Name of the person authorized to present the project	Matkarimov Nurbek Tolonbekovich
1.5.	Current activities of the project initiator	The study of rock paintings in Aravan district and the promotion of horse breeding
2.	PROJECT DETAILS	
2.1.	Project name	Reconstruction of the historical area "Duldul- At"
2.2.	Project type/category	<p>This project is a hard investment and is aimed at the improvement and improvement of the historical area of scientific, educational and religious significance.</p> <p>In terms of organizational participation and funding sources, this project can be implemented in the form of PPP</p> <p>The project will be implemented within 12 months, but the destination itself is designed for the long term</p>

2.3.	Location of the project	This historical object is located in the Aravan district of the Osh region in the village of Aravan, 21 km from the city of Osh.
2.4.	Brief description of the project	Complex landscaping required: <ul style="list-style-type: none"> • ennoblement of places of historical and religious significance (stone of sacrifice, repair of stair lifts, etc.); • definition of the border for the tourist territory (separation from the territories of private houses); • the erection of a statue of a horse with a golden color (according to legend, there was a statue of a golden horse here); • construction of a museum of heavenly horses and modern horse breeding; • construction of a hippodrome in the future.
2.5.	Sales markets (potential customers, which tourists the project is designed for, etc.)	Residents of Kyrgyzstan from all regions, as well as foreign tourists (mainly from Uzbekistan)
2.6.	Competitors (local, regional, etc.)	The closest competitor may be similar historical areas of the city of Osh, but this position can be used in the joint attraction of tourists
2.7.	Assessment of local resources	The area already has a certain network of material and technical base of tourist destination; among the local population there is a certain category of people who have the skills of tourist services in the field of pilgrimage and religious rites.
2.8.	Availability and number of key personnel for project implementation	At this time, 35 people are ready to work for the implementation of the project
3.	FUNDING INFORMATION	
3.1.	Total investment for project implementation	5.5 KGS mln
3.2.	Profitability of the project and availability of cost-benefit analysis	15%
3.3.	Own participation of the project initiator (cash, assets)	0.3 KGS mln
3.4.	Requested funding amount	5.2 KGS mln
3.5.	Purpose of the proposed investment for the purchase	Erection of a monument to the heavenly horse, construction of a museum building
3.6.	Financial condition of the applicant for the last 3 years	350,000 KGS
3.7.	Number of new jobs created	55 people

**Investment project of the company "Public Association
"Club of Masters and Craftsmen Khazhimat Batyr"**

REVIVAL OF THE STREET OF ARTISANS

No.	Name of data (information)	Description of information
1.	COMPANY INFORMATION	
1.1.	Full name	Public Association "Club of Masters and Craftsmen Khazhimat Batyr"
1.2.	Founders, shareholders, director	Batirov Ravshanbek Batirovich
1.3.	Actual address	Osh city, 219, Kolonorchulor street
1.4.	Name of the person authorized to present the project	Batirov Ravshanbek Batirovich
1.5.	Current activities of the project initiator	Revival of handicrafts and traditional production skills of the population, preservation of historical and cultural monuments of Osh through the development of tourism
2.	PROJECT DETAILS	
2.1.	Project name	Revival of the street of artisans in the city of Osh

2.2.	Project type/category	<p>This project is a hard investment and is aimed at beautification and improvement of the city street.</p> <p>In terms of organizational participation and funding sources, this project can be implemented in the form of PPP.</p> <p>The project will be implemented within 12 months, but the destination itself is designed for the long term</p>
2.3.	Location of the project	This street is located in the central part of the city of Osh, on the northeastern side of Sulaiman-Too. The length of the street is 940 m, the average width is 6 m, it starts from the Ravat-Abdullakhan mosque to the Bakty mosque along Navoi street
2.4.	Brief description of the project	<p>To give a historical appearance and an artistic sacred theme, a comprehensive improvement of the street is required:</p> <ul style="list-style-type: none"> • brick laying edge along the entire street; • laying with natural stones the banks of the Dzhupas canal, which flows along the street; • improvement of the canal (installation of water mills (charpalek), repair of bridges); • installation of painted wood and wrought iron gates; • organization of industrial premises (workshops) and stalls (dukans) for the sale of tourist goods: national knives, cradles, national chapans, kalpaks, felt products, etc.; • decoration of the walls of houses; • construction of an arch at the entrance of the street; • organization of traditional types of teahouses and other catering outlets (oriental cuisine)
2.5.	Sales markets (potential customers, which tourists the project is designed for, etc.)	Domestic (from all regions of Kyrgyzstan) and foreign (mainly from Uzbekistan, Kazakhstan and Russia) tourists
2.6.	Competitors (local, regional, etc.)	There are no active competitors. The closest competitor may be the city of Uzgen with a historical and cultural status 60 km from Osh
2.7.	Assessment of local resources	The street is located next to Sulaiman-Too, which has cognitive, religious, cultural and historical significance, where there is a constant accumulation of tourists. It has a catering network with the provision of oriental dishes (cafes, samsakhanas, teahouses); among the local population there is a certain category of people who have the skills to make souvenirs and tourist services.
2.8.	Availability and number of key personnel for project implementation	Currently, 120 people are ready to work for the implementation of the project.
3.	FUNDING INFORMATION	
3.1.	Total investment for project implementation	74.4 KGS mln (including 13.9 KGS mln for laying edge -to-edge bricks and natural stone)
3.2.	Profitability of the project and availability of cost-benefit analysis	15-17%
3.3.	Own participation of the project initiator (cash, assets)	The initiator of the project with the participation of stakeholders can finance 20% of the project
3.4.	Requested funding amount	70 KGS mln
3.5.	Purpose of the proposed investment for the purchase	for the purchase of baked bricks, natural stones, iron and wood materials for the manufacture of gates and water mills, the construction of industrial premises
3.6.	Number of new jobs created	Direct - 120, indirect - 410 people
4.	ADDITIONAL INFORMATION	
4.1.	Additional Indirect Benefits and Impact of the Project	The infrastructure of the block and the street is improving, exemplary street improvement, which may affect other blocks and streets of Osh city

Investment project of Mamazhunusova G.A.

**ORGANIZATION OF THE ACTIVITIES OF THE RECREATION CENTER "KOJOKE"
IN NOOKAT DISTRICT**

No.	Name of data (information)	Description of information
1.	COMPANY INFORMATION	
1.1.	Full name	Recreation area "Ortoluk"
1.2.	Founders, shareholders, director	Mamazhunusova Gulmira Aranovna
1.3.	Actual address	Nookat district, Isanovsik aiyl aimak, Kojoke village
1.4.	Name of the person authorized to present the project	Mamazhunusova Gulmira Aranovna, Manapbek uulu Azamat
1.5.	Current activities of the project initiator	Services for tourists and vacationers
2.	PROJECT DETAILS	
2.1.	Project name	"Organization of the activities of the Kojoke Recreation Center in Nookat district"
2.2.	Project type/category	This project is a hard investment and is aimed at the construction of a recreation center with landscaping. The project will be implemented within 1 year, but the object itself is designed for the long term
2.3.	Location of the project	This tourist zone is located in Nookat district of the Osh region, 60 km from the city of Osh and is located in the beautiful valley of the Koshchan River, which is located at an altitude of 1,445 above sea level.
2.4.	Brief description of the project	<p>The project is aimed at creating the infrastructure of the recreation center, with the recruitment of qualified personnel and a total capacity of up to 40 people.</p> <p>The infrastructure of the recreation center will include a dining room, a swimming pool, a gym, a dance floor, a playground for children's recreation. Services will be provided both to persons from the city of Nookat, and to persons arriving by order from the districts of Osh province.</p> <p>The work of the recreation center involves the operation of the facility around the clock, with a shift work schedule and a full range of services. The complex provides services for 30-40 people at a time. In addition, a program of cultural and entertainment events held by the administration with the involvement of event agencies, artists, dance groups, etc. is envisaged.</p> <p>Comprehensive work required</p> <ul style="list-style-type: none"> • design and erection of a brick low-rise canteen building, where it is planned to provide food in the future; • creation of a playground for children and a gym; • construction of a swimming pool; • construction of a car park before entering the tourist zone; • running a sidewalk.
2.5.	Sales markets (potential customers, which tourists the project is designed for, etc.)	Residents of Kyrgyzstan from all regions, as well as foreign tourists (mainly from Uzbekistan)
2.6.	Competitors (local, regional, etc.)	The closest competitor may be the Kyrgyz-Ata National Park, which is also located in Nookat district, 40 km from Osh
2.7.	Assessment of local resources	There is a land plot with a total area of 5000 sq.m., the natural and tourist potential of the area at an altitude of 1445 m is large, the river Koshchan flows, there is an access road.
2.8.	Availability and number of key personnel for project implementation	Staff available
3.	FUNDING INFORMATION	

3.1.	Total investment for project implementation	6,624 KGS mln
3.2.	Profitability of the project and availability of cost-benefit analysis	15%
3.3.	Own participation of the project initiator (cash, assets)	0.624 KGS mln
3.4.	Requested funding amount	6.0 KGS mln
3.5.	Purpose of the proposed investment for the purchase	Improvement of the land plot with a total area of 5000 sq.m., with the construction of a swimming pool, buildings, roads; electricity, water and heat supply (transformer, boiler, pipes, cables, etc.). Purchase of equipment (furniture, swimming pool, fitness equipment, sauna, kitchen, etc.).
3.6.	Number of new jobs created	Direct - 13, indirect - 45 people
4.	ADDITIONAL INFORMATION	
4.1.	Additional Indirect Benefits and Impact of the Project	The local infrastructure of the village of Kozhok is improving, exemplary improvement of the tourist area, which may affect other regions of Nookat district.

Investment project of Sayitkulova K.Zh.

ORGANIZATION OF A RECREATION AREA "KUT-ORDO" IN THE MOUNTAINOUS AREA OF SARY-OY

No.	Name of data (information)	Description of information
1.	COMPANY INFORMATION	
1.1.	Full name	Organization of a recreation area "Kut-Ordo" in the mountainous area of Sary-Oy "
1.2.	Founders, shareholders, director	Sayitkulova Kanyshay Zhalalidinovna
1.3.	Actual address	Alay district, Gulchinsky aiyl district, Sary-Oy area
1.4.	Name of the person authorized to present the project	Sayitkulova Kanyshay Zhalalidinovna
1.5.	Current activities of the project initiator	Attracting and serving tourists and vacationers through jailoo tourism services
2.	PROJECT DETAILS	
2.1.	Project name	Organization of the recreation area "Kut-Ordo" in the mountainous area of Sary-Oy
2.2.	Project type/category	This project is a hard investment and is aimed at beautification and improvement of local infrastructure. The project will be implemented within 12 months, but the destination itself is designed for the long term
2.3.	Location of the project	This tourist zone is located in the Alay district of the Osh region, 30 km from the village of Gulcha and is located in the beautiful mountainous area of Sary-Oy, which is located at an altitude of over 2000 m above sea level.
2.4.	Brief description of the project	To organize the offer of a tourist package in this area, a comprehensive tourist improvement of the territory is required: <ul style="list-style-type: none"> • improvement of the territory for the reception of tourists (carrying out stone paths, leveling, removal of stone blocks, etc.); • organization of a dining room with restaurant appliances; • installation of a yurt for receiving tourists (3 pieces); • organization of production from local raw materials of dairy products (kymyz, kurut, cottage cheese, sour cream, etc.); • organization of conditions for koumiss treatment.

2.5.	Sales markets (potential customers, which tourists the project is designed for, etc.)	Domestic (from all regions of Kyrgyzstan) and foreign (mainly from Uzbekistan, Kazakhstan and Russia) tourists
2.6.	Competitors (local, regional, etc.)	There are no closer competitors. But there are such recreation areas in other places of Alay and Chong-Alay regions
2.7.	Assessment of local resources	Sary-Oy is a beautiful mountainous area that has great prospects for organizing jailoo tourism and hiking. There are juniper groves that emit phytoncides for ideal purification of the atmosphere of the area. The distance from Osh is 110 km, which allows organizing one-day tours for citizens.
2.8.	Availability and number of key personnel for project implementation	Currently, 12 people are ready to work for the implementation of the project.
3.	FUNDING INFORMATION	
3.1.	Total investment for project implementation	4.1 KGS mln
3.2.	Profitability of the project and availability of cost-benefit analysis	20%
3.3.	Own participation of the project initiator (cash, assets)	0.1 KGS mln
3.4.	Requested funding amount	4.0 KGS mln
3.5.	Purpose of the proposed investment for the purchase	for the purchase of yurts, building materials for the dining room, restaurant appliances, landscaping (technical work)
3.6.	Number of new jobs created	Direct - 20, indirect - 110 people
4.	ADDITIONAL INFORMATION	
4.1.	Additional Indirect Benefits and Impact of the Project	The mountain-tourist infrastructure of Alay district is improving, the exemplary improvement of the tourist territory, which has a mountain-forest landscape.

**Investment project of the company “Public association
“Koomchulukka negizdelgen tourism (CBT)”**

**DEVELOPMENT OF ECO- AND ETHNO-TOURISM
IN THE HIGHLAND ZONE SARY-MOGOL**

No.	Name of data (information)	Description of information
1.	COMPANY INFORMATION	
1.1.	Full name	Koomchulukka Negizdelgen Tourism (CBT)
1.2.	Founders, shareholders, director	Tashbekov Abdilla Umarovich
1.3.	Actual address	Alay district, Sary Mogol village, 37, Mugalimder street
1.4.	Name of the person authorized to present the project	Tashbekov Abdilla Umarovich
1.5.	Current activities of the project initiator	Development of eco- and ethno-tourism and the revival of handicrafts in the high-mountain zones of Osh province
2.	PROJECT DETAILS	
2.1.	Project name	Development of eco- and ethno-tourism in the high-mountainous zone of Sary-Mogol
2.2.	Project type/category	<p>This project is a hard investment and is aimed at beautification and improvement of the city street.</p> <p>In terms of organizational participation and funding sources, this project can be implemented in the form of PPP.</p> <p>The project will be implemented within 12 months, but the destination itself is designed for the long term</p>
2.3.	Location of the project	This settlement is located in Alay district of Osh province, 220 km from the city of Osh. It is located in a high-mountainous zone at an altitude of 2,980 m above sea level.

2.4.	Brief description of the project	For the organization of eco- and ethno-tourism in this area, a comprehensive tourist improvement of the territory is required: <ul style="list-style-type: none"> • installation of cottages (5 pieces) in the tourist zone Tulpar-Kel ; • creation of a yurt village in Sary-Mogol of ethnographic purpose ; • reconstruction of the ethnographic museum in Sary-Mogol with the addition of exhibits ; • organization of exotic pack transport for tourists using horses, yaks and donkeys ; • organization of a demonstration of Kyrgyz national clothes for tourists (women in elechek, etc.)
2.5.	Sales markets (potential customers, which tourists the project is designed for, etc.)	Domestic (from all regions of Kyrgyzstan) and foreign (mainly from Europe) tourists
2.6.	Competitors (local, regional, etc.)	There are no active competitors.
2.7.	Assessment of local resources	Sary- Mogol is a unique settlement in the high-mountainous zone of the Alay region, located at an altitude of 2,980 m above sea level. The beautiful mountain lake Tulpar-Kel is located 25 km, the climbing camp of Lenia peak - 27 km from the village. There is an ethnographic museum in the village, old dwelling houses with clay coverings (without a roof) have been preserved.
2.8.	Availability and number of key personnel for project implementation	At present, 22 people are ready to work for the implementation of the project.
3.	FUNDING INFORMATION	
3.1.	Total investment for project implementation	2,2 KGS mln
3.2.	Profitability of the project and availability of cost-benefit analysis	25-30%
3.3.	Own participation of the project initiator (cash, assets)	0.5 KGS mln
3.4.	Requested funding amount	1.7 KGS mln
3.5.	Purpose of the proposed investment for the purchase	building materials for cottages (5 pieces), purchase of a yurt (2 pieces), national exhibits
3.6.	Number of new jobs created	Direct - 112, indirect - 310 people
4.	ADDITIONAL INFORMATION	
4.1.	Additional Indirect Benefits and Impact of the Project	The infrastructure of the high-mountain village is improving, new jobs are being created, it prevents the outflow of young people to other regions, the preservation of the national values of the Kyrgyz people, the development of horse-drawn tourism and other types of pack transport.

Investment project of the company "Doroot-Korgon Museum"

DEVELOPMENT OF HISTORICAL AND ECOLOGICAL TOURISM IN THE ALAY VALLEY

No.	Name of data (information)	Description of information
1.	COMPANY INFORMATION	
1.1.	Full name	Museum "Doroot-Korgon"
1.2.	Founders, shareholders, director	Nyshanova Kaiyrma Kydyrshaevna
1.3.	Actual address	Chong-Alay district, Chong-Alay aiyl aimak, Doroot-Korgon village
1.4.	Name of the person authorized to present the project	Nyshanova Kaiyrma Kydyrshaevna
1.5.	Current activities of the project initiator	Development of historical and ecological tourism in the Alay Valley
2.	PROJECT DETAILS	

2.1.	Project name	Organization of a tourist cluster “Lenin peak and Kul-Datka fortress” in Chong-Alay district
2.2.	Project type/category	This project is a hard investment and is aimed at beautification and improvement of the city street. In terms of organizational participation and funding sources, this project can be implemented in the form of PPP. The project will be implemented within 12 months, but the destination itself is designed for the long term.
2.3.	Location of the project	The village of Daroot-Korgon is the administrative center of the Chong- Alay district of the Osh region, 300 km from the city of Osh. Lenin Peak is located 50 km from the village.
2.4.	Brief description of the project	To give the historical appearance of the village of Doroot-Korgon and to restore the fortress and develop tourism in the Lenin Peak area, the following are required: <ul style="list-style-type: none"> • reconstruction of the fortress from the time of the Kokan Khanate ; • construction of a historical museum building ; • repair of the road leading to Lenin Peak ; • installation of tourist information boards and signs along the road; • installation of a yurt within the boundaries of a historical fortress showing the ethnographic values of the Kyrgyz as a nomadic people; • organization of a food point with the provision of national dishes (gastronomic tour) and stalls for the sale of souvenirs
2.5.	Sales markets (potential customers, which tourists the project is designed for, etc.)	Domestic (from all regions of Kyrgyzstan) and foreign (mainly from Uzbekistan, Kazakhstan and Russia) tourists
2.6.	Competitors (local, regional, etc.)	There are no active competitors. The closest competitor may be the village of Sary-Mogol
2.7.	Assessment of local resources	The village of Doroot-Korgon is located in the high Alay valley, at the foot of Lenin Peak , it is known with the location of the historical fortress there since the reign of the Kokand Khanate, which determines the possession of a huge educational , cultural, sports and historical potential in the development of national tourism . Located on the road leading to the mountainous areas of Tajikistan, the Kyzyl-Suu River flows nearby - the only tributary of the Amu Darya. Sea buckthorn and currant thickets are of recreational importance.
2.8.	Availability and number of key personnel for project implementation	Currently, 20 people are ready to work for the implementation of the project.
3.	FUNDING INFORMATION	
3.1.	Total investment for project implementation	4.4 KGS mln
3.2.	Profitability of the project and availability of cost-benefit analysis	15-20%
3.3.	Own participation of the project initiator (cash, assets)	0.4 KGS mln
3.4.	Requested funding amount	4.0 KGS mln
3.5.	Purpose of the proposed investment for the purchase	Purchase of a yurt, construction of a museum building, repair of the road leading to Lenin Peak
3.6.	Number of new jobs created	Direct - 9, indirect - 2 10 people
4.	ADDITIONAL INFORMATION	
4.1.	Additional Indirect Benefits and Impact of the Project	The infrastructure of the mountain village is improving on the basis of the development of local resources, the tourism industry is being developed, including mountaineering of international scale.

		The development of tourism can have a multiplier effect for the development of the region and the region: the development of agriculture, including horse breeding, yak breeding, sheep breeding, public catering, including the provision of national dishes, the transport sector, folk arts and crafts, including the processing of wool, leather, fur, wood, etc. .
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Investment project of Aidarov M.K.

DEVELOPMENT OF GEOTOURISM IN KOJO-KELEN AREA IN KARA-SUU DISTRICT

No.	Name of data (information)	Description of information
1.	COMPANY INFORMATION	
1.1.	Full name	Individual entrepreneur Aidarov M.K.
1.2.	Founders, shareholders, director	Aidarov Mamatzhakyp Koibagarovich
1.3.	Actual address	Kara-Suu district, Papan aiyl district, Kojo-Kelen area
1.4.	Name of the person authorized to present the project	Aidarov Mamatzhakyp Koibagarovich
1.5.	Current activities of the project initiator	Provision of services for tourist accommodation
2.	PROJECT DETAILS	
2.1.	Project name	Development of geotourism in the area “Kojo-Kelen” in Kara-Suu district
2.2.	Project type/category	This project is a hard investment and is aimed at beautification and improvement of the city street. In terms of organizational participation and funding sources, this project can be implemented in the form of PPP. The project will be implemented within 12 months, but the destination itself is designed for the long term
2.3.	Location of the project	Locality Kojo-Kelen in the southern part of the Kara-Suu region.
2.4.	Brief description of the project	For tourist development, those territories require: <ul style="list-style-type: none"> • repair of the road leading to the tourist attractions of the area; • at the installation of a yurt (2 pieces); • construction of a guest house for 15 persons ; • installation of boards for tourist information; • organization of horse trails leading to tourist resources of the show .
2.5.	Sales markets (potential customers, which tourists the project is designed for, etc.)	Domestic and foreign (mainly from Uzbekistan and Russia) tourists
2.6.	Competitors (local, regional, etc.)	Potential competitors may be the tourist zones of Kyrgyz-Ata, Abshyr-Ata, Chyyrchyk Pass
2.7.	Assessment of local resources	Tourist area Kojo-Kelen is located in the mountainous zone - in the southern part of Kara-Suu district. Geological and climatic-geographic features of the area have created unique landscapes and natural formations in the valley of the tributaries of the Ak-Buura River: diverse and colorful rock structures, karst caves, sacred springs, juniper groves, alpine meadows, where you can organize various types and forms of recreation and tourism. Through the Jiptik pass you can go to the Alay valley.
2.8.	Availability and number of key personnel for project implementation	Currently, 10 people are ready to work for the implementation of the project.
3.	FUNDING INFORMATION	
3.1.	Total investment for project implementation	3,4 KGS mln
3.2.	Profitability of the project and availability of cost-benefit analysis	15%
3.3.	Own participation of the project initiator (cash, assets)	0.5 KGS mln

3.4.	Requested funding amount	2.9 KGS mln
3.5.	Purpose of the proposed investment for the purchase	Construction materials for the building of the guest house, purchase of yurts, tourist equipment
3.6.	Number of new jobs created	Direct - 55, indirect - 110 people
4.	ADDITIONAL INFORMATION	
4.1.	Additional Indirect Benefits and Impact of the Project	The tourist attractiveness and tourist infrastructure of the Kojokelen area is improving with an increase in the number of visiting tourists, new jobs are being created for the local population, the appearance of mountain villages will change, work will be carried out to protect the geological and hydrological attractions of Kara-Suu district

Investment project of the company
"National Historical and Archaeological Sulaiman-Too Museum Complex"
DEVELOPMENT OF MUSEUMS AND PRESERVATION OF THE HISTORICAL
AND CULTURAL HERITAGE OF OSH

No.	Name of data (information)	Description of information
1.	COMPANY INFORMATION	
	Full name	National Historical and Archaeological Museum Complex "Sulaiman-Too"
1.1.	Founders, shareholders, director	Ministry of Culture, Information, Sports and Youth Policy of the Kyrgyz Republic
1.2.	Actual address	Osh city, 26, Gapar Aitiev street
1.3.	Name of the person authorized to present the project	Ibaidullaev Khairullo
1.4.	Current activities of the project initiator	Development of museum business and preservation of historical and cultural heritage included in the UNESCO World Heritage List through the development of international tourism
2.	PROJECT DETAILS	
2.1.	Project name	Development of museum business and preservation of the historical and cultural heritage of Osh (beautification of the Sulaiman-Too territory in Osh).
2.2.	Project type/category	This project refers to "hard" investments and is aimed at protecting and popularizing the historical and cultural heritage of the city of Osh. In terms of organizational participation and funding sources, this project can be implemented in the form of PPP The project will be implemented within 12 months, but the destination itself is designed for the long term
2.3.	Location of the project	Mount Sulaiman-Too, as an object of history and tourism, is located in the central part of the city of Osh. The mountain has a length of 1,600 m, a width of 470 to 800 m, a height of 1,175 m. In 2009, the mountain was included in the UNESCO List of Natural and Cultural Heritage. The area of the mountain is 112 hectares.
2.4.	Brief description of the project	To give a historical and cultural image and create conditions for pilgrims and vacationers, a set of works is required, including, among other things: <ul style="list-style-type: none"> • installation of a lighting system along tourist trails (2 km); • fencing of the territory of the mountain from the northwestern part (from the side of the Mountain Gate); • improvement of the territory of the head office of the museum (replacement of paving stones); • installation of dry closets in the middle part of the eastern slope of the mountain (5 pieces); • dismantling of a metal barrel for water on top of a mountain that violates the natural appearance of the mountain

2.5.	Sales markets (potential customers, which tourists the project is designed for, etc.)	Domestic (from all regions of Kyrgyzstan) and foreign tourists
2.6.	Competitors (local, regional, etc.)	There are no active competitors. The closest competitor may be the city of Uzgen, 60 km from Osh
2.7.	Assessment of local resources	Sulaiman-Too has been a geological reserve since 1975, formed of limestone, therefore it is distinguished by many caves and grottoes. There are locations of rock paintings of historical and archaeological significance. Mountain objects can serve as places of pilgrimage and recreation.
2.8.	Availability and number of key personnel for project implementation	Currently, 70 people are ready to work on the implementation of the project
2.9.	Current project status	
2.10.	Investment partner	
3.	FUNDING INFORMATION	
3.1.	Total investment for project implementation	12.2 KGS mln
3.2.	Profitability of the project and availability of cost-benefit analysis	15-17%
3.3.	Own participation of the project initiator (cash, assets)	0.2 KGS mln
3.4.	Requested funding amount	12 KGS mln
3.5.	Purpose of the proposed investment for the purchase	For the purchase of materials for fencing, lighting and laying paving stones, the establishment of the Mountain Gate, dry closets
3.6.	Financial condition of the applicant for the last 3 years	
3.7.	The volume of tax payments for the last 5 years	
3.8.	The volume of tax payments for 7 years during the implementation of the project	
3.9.	Number of new jobs created	Direct - 120, indirect - 410 people
4.	ADDITIONAL INFORMATION	
4.1.	Profitability of sales	
4.2.	Additional Indirect Benefits and Impact of the Project	Improved infrastructure of the museum complex - the main attraction of the Osh Region - will have a multiplicative effect on the development of the entire region/

Investment project of the company "Uzgen State Historical and Cultural Museum-Reserve"
DEVELOPMENT OF MUSEUM BUSINESS AND PRESERVATION OF THE HISTORICAL AND CULTURAL HERITAGE OF UZGEN

No.	Name of data (information)	Description of information
1.	COMPANY INFORMATION	
	Full name	State Historical and Cultural Museum-Reserve "Uzgen"
1.1.	Founders, shareholders, director	Ministry of Culture, Information, Sports and Youth Policy of the Kyrgyz Republic
1.2.	Actual address	Uzgen, 126, Lenin street
1.3.	Name of the person authorized to present the project	Abdyrakmanov Sultanbek Arstanbekovich
1.4.	Current activities of the project initiator	Development of museum business and preservation of historical and cultural heritage through the development of international tourism
2.	PROJECT DETAILS	
2.1.	Project name	Development of museum business and preservation of the historical and cultural heritage of the city of Uzgen

		(beautification of the territory of the Uzgen archaeological and architectural complex)
2.2.	Project type/category	<p>This project is a hard investment and is aimed at protecting and promoting the historical and cultural monuments of the city of Uzgen.</p> <p>In terms of organizational participation and funding sources, this project can be implemented in the form of PPP</p> <p>The project will be implemented within 12 months, but the destination itself is designed for the long term.</p>
2.3.	Location of the project	In the eastern part of the Fergana Valley, on the right bank of the Kara-Darya River, there is one of the oldest cities in Kyrgyzstan - Uzgen, whose history goes back more than 2 thousand years. The Uzgen archaeological and architectural complex of the 11th-12th centuries is located in the central part of the city.
2.4.	Brief description of the project	<p>To preserve the historical and cultural heritage and create conditions for tourists, a set of works is required:</p> <ul style="list-style-type: none"> • full fencing of the museum area of 6.5 hectares; • implementation of a lighting system based on solar panels; • reconstruction of the road and pedestrian network with the renewal of the cobbled pavement (500 m); • restoration of an ancient pottery workshop with the creation of master-class systems.
2.5.	Sales markets (potential customers, which tourists the project is designed for, etc.)	Domestic (from all regions of Kyrgyzstan) and foreign tourists
2.6.	Competitors (local, regional, etc.)	The closest competitor is the city of Osh with similar objects of historical and cultural heritage, 60 km from the city of Uzgen.
2.7.	Assessment of local resources	The Uzgen archaeological and architectural complex is a monument of the reign of the Turkic Karakhanid dynasty. It consists of a minaret, standing apart, and a group of mausoleums, lined up in one line and located at a distance of approximately 100 meters from the minaret. These buildings are unique masterpieces of the monumental architecture of the peoples of Central Asia in the Middle Ages. The Uzgen minaret was built in the middle of the 11th century, currently its height is 27.5 meters. Nearby are the mausoleums of the Karakhanid rulers.
2.8.	Availability and number of key personnel for project implementation	Currently, 50 people are ready to work for the project
2.9.	Current project status	
2.10.	Investment partner	
3.	FUNDING INFORMATION	
3.1.	Total investment for project implementation	15.8 KGS mln
3.2.	Profitability of the project and availability of cost-benefit analysis	15%
3.3.	Own participation of the project initiator (cash, assets)	0.2 KGS mln
3.4.	Requested funding amount	15.6 KGS mln
3.5.	Purpose of the proposed investment for the purchase	For the purchase of materials for fencing, lighting and laying paving stones, restoration of a pottery workshop
3.6.	Financial condition of the applicant for the last 3 years	
3.7.	The volume of tax payments for the last 5 years	
3.8.	The volume of tax payments for 7 years during the implementation of the project	
3.9.	Number of new jobs created	Direct - 50, indirect - 210 people

4.	ADDITIONAL INFORMATION	
4.1.	Profitability of sales	
4.2.	Additional Indirect Benefits and Impact of the Project	Preservation of cultural and historical monuments, improvement of the infrastructure of the museum complex, improvement of its territory. All this will increase the tourist attractiveness of the city of Uzgen.

Information about "soft" investment projects

REVIEW AND IMPROVEMENT OF THE NATIONAL LEGISLATION IN THE FIELD OF TOURISM DEVELOPMENT

No	Name of information	Description of information
1.	COMPANY INFORMATION	
1.1.	Full name of the company	Consulting company or group of experts engaged by tender
1.2.	Founders, shareholders, director	
1.3.	Actual address	
1.4.	Name of the person responsible for presenting the project	
1.5.	Current activities of the project initiator	
2.	PROJECT DETAILS	
2.1.	Project title	Review and improvement of the national legislation in the field of tourism development (the STDSP legislative project)
2.2.	Project type/category	The project requires "soft" investments and will be implemented within 12 months
2.3.	Project location	In Bishkek, with visits to the Osh Region to collect information and public consultations
2.4.	Brief description of the project	The project will focus on a detailed review and analysis of legislation in the tourism development, and the development and introduction of the required changes and additions to the NLA (required changes to the following NLAs: <i>codes "Tax Code", "Land Code", the laws "On Tourism", "On pastures", "On Renewable Energy", "On Creative Industries Park", sub-laws, NLA of local authorities, etc.)</i>
2.5.	Sales markets (potential customers, which tourists the project is intended for, etc.)	
2.6.	Competitors	
2.7.	Local resources assessment	There are a number of consulting companies and experts who can participate in the tender
2.8.	The number of new jobs created	A team of 4-5 experts will be involved
3.	FUNDING INFORMATION	
3.1.	Total investment for the project	4.3 KGS mln
3.2.	Project profitability and availability of cost-benefit analysis	
3.3.	Own participation of the project initiator (funds, assets)	
3.4.	Requested amount of funding	4.3 KGS mln
3.5.	The purpose of the investment	Procurement of consulting services

**DEVELOPMENT OF PROFESSIONAL AND HUMAN RESOURCE CAPACITY OF THE
TOURISM INDUSTRY OF THE OSH REGION/REPUBLIC**

No	Name of information	Description of information
1.	COMPANY INFORMATION	
1.1.	Full name of the company	Consulting company or group of experts engaged by tender
1.2.	Founders, shareholders, director	
1.3.	Actual address	
1.4.	Name of the person responsible for presenting the project	
1.5.	Current activities of the project initiator	
2.	PROJECT DETAILS	
2.1.	Project title	Development of professional and human resource capacity of the tourism industry of the Osh Region/Republic (the STDSP educational project)
2.2.	Project type/category	The project refers to “soft” investments and will be implemented within 3 years
2.3.	Project location	In Bishkek, with visits to the regions to gather information, conduct trainings
2.4.	Brief description of the project	<p>The program will include training, retraining and advanced training of personnel, training of trainers based on specially prepared training modules in the following areas:</p> <ul style="list-style-type: none"> ➤ <i>"Tourism as a locomotive of the economy";</i> ➤ <i>"Fundamentals of a green economy in tourism";</i> ➤ <i>"Corporate ethics and culture of service";</i> ➤ <i>"Sustainable and inclusive environment";</i> ➤ <i>"Urban Studies and Tourism";</i> ➤ <i>"Digital management and SMM services", etc.</i>
2.5.	Sales markets (potential customers, which tourists the project is intended for, etc.)	
2.6.	Competitors	
2.7.	Local resources assessment	There are a number of consulting companies and experts who can participate in the tender
2.8.	The number of new jobs created	A team of 5-7 key experts and 10-15 additional short-term experts and teachers will be involved
3.	FUNDING INFORMATION	
3.1.	Total investment for the project	25.8 KGS mln
3.2.	Project profitability and availability of cost-benefit analysis	
3.3.	Own participation of the project initiator (funds, assets)	
3.4.	Requested amount of funding	25.8 KGS mln
3.5.	The purpose of the investment	Procurement of consulting services

BUILDING THE CAPACITY OF MUSEUMS IN THE OSH REGION

No	Name of information	Description of information
1.	COMPANY INFORMATION	
1.1.	Full name	Consulting company or group of experts involved in the tender
1.2.	Founders, shareholders, director	
1.3.	Actual address	
1.4.	Name of the person authorized to present the project	
1.5.	Current activities of the project initiator	
2.	PROJECT DETAILS	
2.1.	Project title	Building the museum capacity of museums in the Osh Region (the STDSP museum project)
2.2.	Project type/category	The project is a “soft” investment and will be implemented within 5 years
2.3.	Location of the project	Osh city with field trips to collect information, public consultations, conduct trainings
2.4.	Brief description of the project	<p>The project will consist of three components:</p> <ul style="list-style-type: none"> ▪ <i>Component "Development of human capital"</i> (includes all types of training activities (trainings, courses, consultations, mentoring, etc.). ▪ <i>Component "Expansion of social capital"</i> (events aimed at expanding networking between museum employees: “business cafe”, “fish ball”, “speaker event”, etc. This also includes the organization of exchange visits with leading museums in Uzbekistan, Kazakhstan, Russia). ▪ <i>Component "Development of an interactive approach"</i>. This component involves the organization and conduct of interactive games for children (on the history, geography, anthropology of the region) and adults (quests, film screenings, hiking combined with education).
2.5.	Sales markets (potential customers, which tourists the project is designed for, etc.)	
2.6.	Competitors (local, regional, etc.)	
2.7.	Assessment of local resources	There are a number of consulting companies and experts that can participate in the tender
2.8.	Number of new jobs created	A team of 5-7 key experts and 10-15 additional short-term experts and trainers will be recruited
3.	FUNDING INFORMATION	
3.1.	Total investment for project implementation	23.2 KGS mln
3.2.	Profitability of the project and availability of cost-benefit analysis	
3.3.	Own participation of the project initiator (funds, assets)	
3.4.	Requested amount of funding	23.2 KGS mln
3.5.	The purpose of the investment	Procurement of consulting services

Appendix 3c. Provisional STDSP budget³⁴

No.	Measures/activities	Responsible sides	Time frame work	Unit	NEED IN FINANCING				POSSIBILITIES				FINANCIAL GAP			
					State budget	PIP and grants	other	Total	State budget	PIP and grants	other	Total	State budget	PIP and grants	other	Total
Strategic objective 1. IMPROVE THE QUALITY AND EFFICIENCY OF WORK WITH <i>HUMAN RESOURCES</i>																
1.	Implement the educational project proposed within the framework of the STDSP, including:	DoT TDSF KR PRP KR, LGA and LSG bodies in Osh province Osh Mayor’s Office	2024-2027	KGS mln	-	25.8	-	25.8	-	0	-	0	-	-25.8	-	-25.8
	1.1. Conduct a series of trainings on the course "Tourism as a locomotive of the economy."		2024-2027	KGS mln	-	3.7	-	3.7	-	0	-	0	-	-3.7	-	-3.7
	1.2. Conduct a series of trainings on the courses "Fundamentals of the Green Economy", "Environmental Situation in the Kyrgyz Republic and Central Asia", "Sustainable Energy and RES"		2024-2027	KGS mln	-	5.1	-	5.1	-	0	-	0	-	-5.1	-	-5.1

³⁴ This table is a financial document. See paragraph 3.5 “2023-2027 General Action Plan for the STDSP implementation” for more details.

No.	Measures/activities	Responsible sides	Time frame work	Unit	NEED IN FINANCING				POSSIBILITIES				FINANCIAL GAP			
					State budget	PIP and grants	other	Total	State budget	PIP and grants	other	Total	State budget	PIP and grants	other	Total
	1.3. Conduct a series of trainings on the topics “What does the client want”, “Why is marketing important”, “SMM management”		2024-2027	KGS mln	-	5.1	-	5.1	-	0	-	0	-	-5.1	-	-5.1
	1.4. Conduct a series of trainings to improve financial and economic literacy, corporate culture, business plan development		2024-2027	KGS mln	-	6.8	-	6.8	-	0	-	0	-	-6.8	-	-6.8
	1.5. Conduct a series of trainings on the topics "Sustainable and inclusive environment", "Urban planning", "Fundamentals of urban studies"		2024-2027	KGS mln	-	5.1	-	5.1	-	0	-	0	-	-5.1	-	-5.1
2.	Implement an ARIS educational (training) project in the field of tourism Within the framework of the project, consider the possibility of training guides for the mountainous regions of Osh province	PRP KR, LGA and LSG bodies in Osh province ARIS	2023-2024	KGS mln	-	1.8	-	1.8	-	1.8	-	1.8	-	0	-	0

No.	Measures/activities	Responsible sides	Time frame work	Unit	NEED IN FINANCING				POSSIBILITIES				FINANCIAL GAP			
					State budget	PIP and grants	other	Total	State budget	PIP and grants	other	Total	State budget	PIP and grants	other	Total
3.	Train culinary/catering business employees (on the basis of Osh vocational schools No. 112 and 116).	DoT Osh Mayor's Office	2024-2027	KGS mln	0	-	-	0								
4.	Implement the museum project proposed within the framework of the STDSP, including:	MCISYP DoT PRP KR in Osh province Osh Mayor's Office	2024-2027	KGS mln	-	23.2	-	23.2	-	0	-	0	-	-23.2	-	-23.2
	4.1.Train tour guides (component Human capital development)		2024-2027	KGS mln	-	5.1	-	5.1	-	0	-	0	-	-5.1	-	-5.1
	4.2.Organize exchange visits of museum staff to the leading museums of the CIS in (component Expansion of social capital)		2024-2027	KGS mln	-	8.3	-	8.3	-	0	-	0	-	-8.3	-	-8.3
	4.3.Introduce the use of interactive approaches in the work of museums (component Development of an interactive approach).		2024-2027	KGS mln	-	9.8	-	9.8	-	0	-	0	-	-9.8	-	-9.8

No.	Measures/activities	Responsible sides	Time frame work	Unit	NEED IN FINANCING				POSSIBILITIES				FINANCIAL GAP			
					State budget	PIP and grants	other	Total	State budget	PIP and grants	other	Total	State budget	PIP and grants	other	Total
Strategic objective 2. INCREASE THE LEVEL OF INSTITUTIONAL SUPPORT FOR THE SECTOR, FOCUSING ON IMPROVING THE QUALITY OF SERVICES																
5.	Unite the Tourism Development Councils under the PRP KR in Osh province and Osh Mayor’s Office into a single Council (OJTDC)	PRP KR, LGA and LSG bodies in Osh province Osh Mayor’s Office	2024	million KGSs	0	-	-	0								
6.	Establish territorial commissions to ensure safety at tourist sites	PRP KR, LGA and LSG bodies in Osh province Osh Mayor’s Office	2024	KGS mln	0	-	-	0								
7.	Conduct surveys to take into account the opinion of the population in the field of tourism in the Osh Region with the invitation of professional sociological companies	DoT TDSF KR	2024-2027	KGS mln	-	5.2	-	5.2	-	0	-	0	-	-5.2	-	-5.2
8.	Implement a Tourism Satellite Account system in the tourism sector of the Osh Region	DoT NSC KR PRP KR, LGA and LSG bodies	2025-2026	KGS mln	-	40	-	40	-	40	-	40	-	0	-	0

No.	Measures/activities	Responsible sides	Time frame work	Unit	NEED IN FINANCING				POSSIBILITIES				FINANCIAL GAP			
					State budget	PIP and grants	other	Total	State budget	PIP and grants	other	Total	State budget	PIP and grants	other	Total
		in Osh province Osh Mayor's Office ARIS														
Strategic objective 3. <i>ENHANCE THE REGULATORY ENVIRONMENT FOR SUSTAINABLE TOURISM DEVELOPMENT</i>																
9.	Implement the legislative project proposed within the framework of the STDSP, including:	DoT TDSF KR	2024-2025	KGS mln	-	4.3	-	4.3	-	0	-	0	-	-4.3	-	-4.3
	9.1. Amendments to the following legal acts: - Tax Code of the KR, - Land Code of the KR, - Law "On tourism", - Law of the KR "On pastures", - "On renewable energy sources", - "About the Park of Creative Industries", - by-laws, legal acts of LSG bodies, etc.)	Sector-specific departments, PRP KR, LGA and LSG bodies in Osh province, Osh Mayor's Office			-	2.5	-	2.5	-	0	-	0	-	-2.5	-	-2.5
	9.2. Develop safety standards for the stay of tourists in Kyrgyzstan	DoT MES KR MOH KR			-	0.9	-	0.9	-	0	-	0	-	-0.9	-	-0.9

No.	Measures/activities	Responsible sides	Time frame work	Unit	NEED IN FINANCING				POSSIBILITIES				FINANCIAL GAP			
					State budget	PIP and grants	other	Total	State budget	PIP and grants	other	Total	State budget	PIP and grants	other	Total
	9.3. Develop norms and professional standards governing the work of adventure tourism guides and instructors	DoT MES KR			-	0.9	-	0.9	-	0	-	0	-	-0.9	-	-0.9
Strategic objective 4. SPREAD A NATURE-FRIENDLY CULTURE THROUGH THE PROMOTION OF <i>GREEN ECONOMY</i> AND SUSTAINABLE TOURISM																
10.	Conduct information campaigns about respect for the environment through the media, TV and social networks	MNRETS PRP KR, LGA and LSG bodies in Osh province, Osh Mayor's Office	2024- 2027	KGS mln	-	2.8	-	2.8	-	0	-	0	-	-2.8	-	-2.8
11.	Conduct a systematic environmental audit of all tourist destinations in the Osh Region	DoT MNRETS	2024- 2025	KGS mln	-	8.8	-	8.8	-	0	-	0	-	-8.8	-	-8.8
12.	Study the possibilities of implementing in the Osh Region a set of measures aimed at: - planting forests near mountain slopes and other drought- and salt-tolerant crops,	DoT MNRETS MOA KR PRP KR, LGA and LSG bodies	2024 -2025	KGS mln	-	7.9	-	7.9	-	0	-	0	-	-7.9	-	-7.9

No.	Measures/activities	Responsible sides	Time frame work	Unit	NEED IN FINANCING				POSSIBILITIES				FINANCIAL GAP			
					State budget	PIP and grants	other	Total	State budget	PIP and grants	other	Total	State budget	PIP and grants	other	Total
	- introduction of biogas technologies in the agricultural sector, - introduction of technologies for drip and discrete irrigation, sprinkling, etc.	in Osh province, Osh Mayor's Office														
Strategic objective 5. CONTRIBUTE TO THE GROWTH OF THE REGION'S RECOGNITION IN THE GLOBAL TOURISM MARKET THROUGH THE INTRODUCTION OF MODERN <i>MARKETING TOOLS</i>																
13.	Create a Tourist portal of the Osh Region, including: - information about museum objects and tourist destinations in the Osh Region, - information on the list of business entities delivering products and goods; - materials on the safety of tourists, - digital archive of documents and knowledge on tourism.	DoT TDSF KR MES KR PRP KR in Osh province, Osh Mayor's Office	2024	KGS mln	-	1.8	-	1.8	-	0	-	0	-	-1.8	-	-1.8

No.	Measures/activities	Responsible sides	Time frame work	Unit	NEED IN FINANCING				POSSIBILITIES				FINANCIAL GAP			
					State budget	PIP and grants	other	Total	State budget	PIP and grants	other	Total	State budget	PIP and grants	other	Total
14.	<p>Implement an ARIS museum project</p> <p>Within the framework of the project:</p> <ul style="list-style-type: none"> - conduct a marketing-oriented interpretation of the historical and cultural significance of Sulaiman- Too and the Uzgen complex to increase interest among tourists; - conduct diagnostics of the work of Sulaiman- Too and the Uzgen complex to determine opportunities for conducting commercial activities of state museums; - introduce standards for the assessment, restoration and preservation of cultural values in the museums of Sulaiman- Too and the Uzgen complex. 	MCISYP DoT Osh Mayor's Office Uzgen Mayor's Office ARIS	2023-2024	mln KGS	-	0.8	-	0.8	-	0.8	-	0.8	-	0	-	0

No.	Measures/activities	Responsible sides	Time frame work	Unit	NEED IN FINANCING				POSSIBILITIES				FINANCIAL GAP			
					State budget	PIP and grants	other	Total	State budget	PIP and grants	other	Total	State budget	PIP and grants	other	Total
Strategic objective 6. CREATE FAVORABLE FINANCIAL AND ECONOMIC CONDITIONS FOR THE DEVELOPMENT OF TOURISM BUSINESS																
15.	Develop a roadmap for extending PPP mechanisms to the tourism sector	MEC KR MOF KR PRP KR in Osh province Osh Mayor’s Office	2024	KGS mln	-	2.7	-	2.7	-	0	-	0	-	-2.7	-	-2.7
16.	Conduct a campaign to inform representatives of the region’s tourism industry about business lending and fundraising opportunities.	MEC KR DoT	2024-2025	KGS mln	-	0.9	-	0.9	-	0	-	0	-	-0.9	-	-0.9
Strategic objective 7. ADJUST THE WORK ON THE INTEGRATED DEVELOPMENT OF THE REGIONAL INFRASTRUCTURE TAKING INTO ACCOUNT THE NEEDS OF THE TOURISM SECTOR																
17.	Develop a program to improve the pedestrian and bicycle infrastructure, parking spaces in large settlements of the Osh Region	PRP KR, LGA and LSG bodies in Osh province, Osh Mayor’s Office	2024	KGS mln	-	4.5	-	4.5	-	0	-	4.5	-	-4.5	-	-4.5

No.	Measures/activities	Responsible sides	Time frame work	Unit	NEED IN FINANCING				POSSIBILITIES				FINANCIAL GAP			
					State budget	PIP and grants	other	Total	State budget	PIP and grants	other	Total	State budget	PIP and grants	other	Total
18.	Develop a program/ programs for electrification and expansion of mobile coverage at tourist destinations in remote mountainous areas of Osh province	PRP KR, LGA and LSG bodies in Osh province, Osh electro Mobile operators	2024	KGS mln	-	22.5		22.5	-	0	-	0	-	-22.5	-	-22.5
19.	Improve the material and technical base and infrastructure of Sulaiman-Too and the Uzgen complex within the framework of component 3 of the ARIS Regional Economic Development project “Catalyzing investments for tourism and urban development”	MCISYP PRP KR in Osh province, Osh Mayor’s Office ARIS	2024-2027	KGS mln	-	540		540	-	540		540		0		0
20.	Implement projects of ARIS and TDSF for the construction of rest points in the Osh Region, including:	PRP KR in Osh province, Osh Mayor’s Office														
	20.1. Construction of 11 TDSF rest points	TDSF KR	2024-2025	KGS mln	9.9	-	-	9.9	9.9	-	-	9.9	0	-	-	0
	20.2. Construction of 3 ARIS rest points	ARIS	2024-2025	KGS mln	-	3.03	-	3.03	-	3.03		3.03	-	0	-	0

No.	Measures/activities	Responsible sides	Time frame work	Unit	NEED IN FINANCING				POSSIBILITIES				FINANCIAL GAP			
					State budget	PIP and grants	other	Total	State budget	PIP and grants	other	Total	State budget	PIP and grants	other	Total
21.	Implement the infrastructure projects proposed within the framework of the STDSP to modernize the main tourist destinations (Pamir-Alay ski complex, Duldul-At, Kojokelen , etc.) (see Appendix 3 b).	PRP KR in Osh province, Osh Mayor's Office TDSF KR ARIS	2024-2027	KGS mln	-	170.5	53.5	224	-	0	53.5	53.5		-170.5	0	-170.5
22.	Study the issue of comprehensive modernization of Osh international airport, including the construction of a new terminal and a multimodal transport center based on it	DoT Tourism FUGI under MEC KR MTC KR Osh Mayor's Office PRP KR in Osh province	2025	KGS mln	-	9	-	9	-	0	-	0	-	-9	-	-9
23.	Develop a program to increase the attractiveness of bus stations in Osh city	Osh Mayor's Office MTC KR	2024	KGS mln	-	0.9	-	0.9	-	0	-	0	-	-0.9	-	-0.9

Appendix 3d. Provisional budget for SILK ROAD FORUM/EXPO

Item of expenses	Unit of change	Quantity	Price	Sum	Note
Transfer of forum and exhibition participants from abroad	people	30	500	15,000	Round trip tickets
Transfer of forum and exhibition participants from Bishkek	people	20	80	1,600	Airline tickets Bishkek-Osh-Bishkek
Accommodation for participants and honored guests	people	50	40	4,000	Accommodation with 2 nights in hotels.
POS forum materials	set	100	10	1,000	Folders, programs with the logo of the Summit, a souvenir flash drive, etc.
Simultaneous translation with equipment	group	1	2,000	2,000	Russian, Kyrgyz, English, Chinese. Headphones for forum participants, interpreter booths, equipment for simultaneous translation.
Production of promotional videos	PC.	2	1,000	2,000	1. SILK ROAD FORUM roller. 2. SILK ROAD EXPO video
SMM -marketing of the forum and exhibition	Target markets	3	500	1,500	Kyrgyzstan, CIS, Europe.
Making tents for SILK ROAD EXPO		100	100	10,000	100 exhibition tents.
Unexpected expenses		1	1,000	1,000	Expenses for experts for the preparation of show events - script, theatrical performances, etc.
Buffet dinner for forum and exhibition participants	people	100	10	1,000	Delegates, honored guests, journalists.
TOTAL (in USD)				39,100	

Appendix 3e. Matrix of indicators for monitoring and evaluating the STDSP implementation in 2023-2028

DEVELOPMENT TARGETS FOR THE OSH REGION'S TOURISM SECTOR UNDER THE STDSP						
The name of indicators	2023	2024	2025	2026	2028	2028
<i>Enterprises, tourism organizations and recreational institutions, units</i>						
Osh province	22	24	27	31	34	39
Osh city	23	24	25	26	27	29
<i>Services provided by travel agencies, KGS mln</i>						
Osh province	0.8	1.0	1.3	1.7	2.2	2.8
Osh city	30	41	56	76	104	142
<i>Services of hotels and other short-term accommodation facilities, KGS mln</i>						
Osh province	15.2	16.5	17.9	19.4	21.1	22.9
Osh city	83.8	85.6	87.5	89.4	91.3	93.3
<i>Number of domestic tourists, people</i>						
Osh province	45,600	70,593	109,285	169,183	261,911	405,463
Osh city	34,916	39,839	45,455	51,864	59,175	67,518
<i>Number of foreign tourists, people</i>						
Osh city	5,446	6,784	8,450	10,526	13,112	16,332
<i>Duration of stay, in the region as a whole, days</i>	3.8	4	4.2	4.3	4.4	4.5
<i>Average expenses, USD</i>	86	94	105	111	118	125

No.	Tasks (Actions)	Description of the indicator	Unit	Basic year 2023	Interim (annual) indicators					Outcome indicators or targets	Responsible sides
					2024	2025	2026	2027	2028		
1.	Implement the educational project proposed within the framework of the STDSP, including:	Total number of people trained within the project (the same people can attend several courses)	people	0	295 (20%)	295 (40%)	295 (60%)	295 (80%)	295 (100%)	1,475	DoT TDSF KR Osh Joint Tourism Development Council (as a body representing the region)
	1.1. Conduct a series of trainings on the course "Tourism as a locomotive of the economy."	Number of people trained in courses	people	0	30	30	30	30	30	150	
	1.2. Conduct a series of trainings on the courses "Fundamentals of the Green Economy", "Environmental Situation in the Kyrgyz Republic and Central Asia", "Sustainable Energy and RES"	Total number of people trained in 3 courses	people	0	75	75	75	75	75	375	

No.	Tasks (Actions)	Description of the indicator	Unit	Basic year 2023	Interim (annual) indicators					Outcome indicators or targets	Responsible sides
					2024	2025	2026	2027	2028		
	1.3. Conduct a series of trainings on the topics “What does the client want”, “Why is marketing important”, “SMM management”	Total number of people trained in 3 courses	people	0	75	75	75	75	75	375	
	1.4. Conduct a series of trainings to improve financial and economic literacy, corporate culture, business plan development	Number of people trained in two courses	people	0	40	40	40	40	40	200	
	1.5. Conduct a series of trainings on the topics "Sustainable and inclusive environment", "Urban planning", "Fundamentals of urban studies"	Total number of people trained in 3 courses	people	0	75	75	75	75	75	375	
2.	Implement an ARIS educational (training) project in the field of tourism	Number of people trained	people	0	30 (100%)	-	-	-	-	30	PRP KR, LGA and LSG bodies in Osh province ARIS OJTDC

No.	Tasks (Actions)	Description of the indicator	Unit	Basic year 2023	Interim (annual) indicators					Outcome indicators or targets	Responsible sides
					2024	2025	2026	2027	2028		
	Within the framework of the project, consider the possibility of training guides for the mountainous regions of Osh province										
3.	Train culinary/catering business employees for regional tourist destinations	Total number of trained (on the basis of Osh vocational schools No. 112 and 116).	people	0	20 (20%)	20 (40%)	20 (60%)	20 (80%)	20 (100%)	100	DoT Osh Mayor's Office OJTDC
4.	Implement the museum project proposed within the framework of the STDSP, including:										MCISYP DoT PRP KR in Osh province Osh Mayor's Office
	4.4. Train tour guides (component Human capital development)	Total number of trained	people	0	12 (20%)	12 (40%)	12 (60%)	12 (80%)	12 (100%)	60	
	4.5. Organize exchange visits of museum staff to the leading museums of the CIS in (component	Number of internship participants	people	0	3 (20%)	3 (40%)	3 (60%)	3 (80%)	3 (100%)	15	

No.	Tasks (Actions)	Description of the indicator	Unit	Basic year 2023	Interim (annual) indicators					Outcome indicators or targets	Responsible sides
					2024	2025	2026	2027	2028		
	Expansion of social capital)										
	4.6. Introduce the use of interactive approaches in the work of museums (component Development of an interactive approach).	Level of implementation of interactive working methods and equipping museums with appropriate equipment	%	0	At least 10	At least 20	At least 30	At least 40	At least 50	50	
5.	Unite the Tourism Development Councils under the PRP KR in Osh province and Osh Mayor's Office into a single Council (OJTDC)	Annual increase in the number of regional tourism issues (problems) resolved by the OJTDC	%	-	-	At least 10	At least 10	At least 20	At least 20	20	PRP KR, LGA and LSG bodies in Osh province Osh Mayor's Office
6.	Establish territorial commissions to ensure safety at tourist sites	Percentage of created territorial units in administrative-territorial units	%	-	At least 20	At least 50	At least 80	At least 90	At least 100	100	PRP KR, LGA and LSG bodies in Osh province Osh Mayor's Office OJTDC

No.	Tasks (Actions)	Description of the indicator	Unit	Basic year 2023	Interim (annual) indicators					Outcome indicators or targets	Responsible sides
					2024	2025	2026	2027	2028		
7.	Conduct surveys to take into account the opinion of the population in the field of tourism in the Osh Region with the invitation of professional sociological companies	Subjects participating in a special study if the surveys are conducted annually	%	0	At least 50	At least 60	At least 80	At least 90	At least 100	100	DoT TDSF KR OJTDC
8.	Implement a Tourism Satellite Account system in the tourism sector of the Osh Region	Entities involved in the implementation of regional satellite accounts	%	0	-	-	At least 60	At least 80	At least 100	100	DoT NSC KR PRP KR, LGA and LSG bodies in Osh province Osh Mayor's Office ARIS OJTDC
9.	Implement the legislative project in 2024-2025 proposed within the framework of the STDSP, including:										
	9.1. Amendments to the following legal acts:	1. Number of introduced legal acts	% of total number based on	0	At least 40	At least 80	-	-	-	80	Sector-specific departments,

No.	Tasks (Actions)	Description of the indicator	Unit	Basic year 2023	Interim (annual) indicators					Outcome indicators or targets	Responsible sides
					2024	2025	2026	2027	2028		
	- Tax Code of the KR, - Land Code of the KR, - Law “On tourism”, - Law of the KR “On pastures”, - "On renewable energy sources", - "About the Park of Creative Industries", - by-laws, legal acts of LSG bodies, etc.)	affecting the tourism sector 2. Number of adopted legal acts affecting the tourism sector	their inven-tory		At least 20	At least 60				60	PRP KR, LGA and LSG bodies in Osh province, Osh Mayor’s Office
	9.2. Develop safety standards for the stay of tourists in Kyrgyzstan	Level of the implementation of safety standards when adopted	%	0	-	-	At least 20	At least 50	At least 80	80	DoT MES KR MOH KR
	9.3. Develop norms and professional standards governing the work of adventure tourism guides and instructors	Level of implementation of norms and standards when adopted	%	0	-	-	At least 20	At least 50	At least 80	80	DoT MES KR
10.	Conduct information campaigns about respect for the	Cumulative level of awareness of the	%	10	At least 15	At least 20	At least 30	At least 40	At least 50	50	MNRETS

No.	Tasks (Actions)	Description of the indicator	Unit	Basic year 2023	Interim (annual) indicators					Outcome indicators or targets	Responsible sides
					2024	2025	2026	2027	2028		
	environment through the media, TV and social networks	population of the Osh region (familiarity with the campaign) of the total population									PRP KR, LGA and LSG bodies in Osh province, Osh Mayor's Office
11.	Conduct a systematic environmental audit of all tourist destinations in the Osh Region	Percentage of coverage of tourist destinations	%	0	50	100	-	-	-	100	DoT MNRETS

No.	Tasks (Actions)	Description of the indicator	Unit	Basic year 2023	Interim (annual) indicators					Outcome indicators or targets	Responsible sides
					2024	2025	2026	2027	2028		
12.	Study in 2024-2025 the possibilities of implementing in the Osh Region a set of measures aimed at: - planting forests near mountain slopes and other drought- and salt-tolerant crops, - introduction of biogas technologies in the agricultural sector, - introduction of technologies for drip and discrete irrigation, sprinkling, etc.	Number of launched/involved projects based on the development of the plan/program	units	-	-	-	1	2	3	6 (total number)	DoT MNRETS MOA KR PRP KR, LGA and LSG bodies in Osh province, Osh Mayor's Office
13.	Create a Tourist portal of the Osh Region, including: - information about museum objects and tourist destinations in the Osh Region, - information on the list of business	Daily traffic on the portal after its launch	number of daily visits	-	-	500	900	1,500	2,500	2,500	DoT TDSF KR MES KR PRP KR in Osh province, Osh Mayor's Office

No.	Tasks (Actions)	Description of the indicator	Unit	Basic year 2023	Interim (annual) indicators					Outcome indicators or targets	Responsible sides
					2024	2025	2026	2027	2028		
	entities delivering products and goods; - materials on the safety of tourists, - digital archive of documents and knowledge on tourism.										
14.	Implement an ARIS museum project Within the framework of the project: - conduct a marketing-oriented interpretation of the historical and cultural significance of Sulaiman- Too and the Uzgen complex to increase interest among tourists; - conduct diagnostics of the work of Sulaiman-Too and the Uzgen complex to determine opportunities for	Implementation of the proposed measures	degree of implementation (%)	-	-	At least 20	At least 40	At least 60	At least 80	80	MCISYP DoT Osh Mayor's Office Uzgen Mayor's Office ARIS

No.	Tasks (Actions)	Description of the indicator	Unit	Basic year 2023	Interim (annual) indicators					Outcome indicators or targets	Responsible sides
					2024	2025	2026	2027	2028		
	conducting commercial activities of state museums; - introduce standards for the assessment, restoration and preservation of cultural values in the museums of Sulaiman- Too and the Uzgen complex.										
15.	Develop in 2024 a roadmap for extending PPP mechanisms to the tourism sector	Number of launched/involved projects based on the development of the plan/program	units	-	-	2	4	6	10	22 (total)	MEC KR MOF KR PRP KR in Osh province Osh Mayor's Office
16.	Conduct a campaign to inform representatives of the region's tourism industry about business lending and fundraising opportunities.	Cumulative level of awareness of the population of the Osh region in the target group of potential businessmen in	%	0	At least 20	At least 30	At least 40	At least 60	At least 80	80	MEC KR DoT

No.	Tasks (Actions)	Description of the indicator	Unit	Basic year 2023	Interim (annual) indicators					Outcome indicators or targets	Responsible sides
					2024	2025	2026	2027	2028		
		the tourism sector									
17.	Develop a program to improve the pedestrian and bicycle infrastructure, parking spaces in large settlements of the Osh Region	Implementation of the proposed measures	degree of implementation (%)	-	-	At least 20	At least 40	At least 60	At least 80	80	PRP KR, LGA and LSG bodies in Osh province, Osh Mayor's Office
18.	Develop a program/programs for electrification and expansion of mobile coverage at tourist destinations in remote mountainous areas of Osh province	Implementation of the proposed measures	degree of implementation (%)	-	-	At least 20	At least 40	At least 60	At least 80	80	PRP KR, LGA and LSG bodies in Osh province, Oshelectro Mobile operators
19.	Improve the material and technical base and infrastructure of Sulaiman-Too and the Uzgen complex within the framework of component 3 of the ARIS Regional Economic	Implementation of activities included in the project	degree of implementation (%)	-	-	At least 25	At least 50	At least 75	At least 100	100	MCISYP PRP KR in Osh province, Osh Mayor's Office ARIS

No.	Tasks (Actions)	Description of the indicator	Unit	Basic year 2023	Interim (annual) indicators					Outcome indicators or targets	Responsible sides
					2024	2025	2026	2027	2028		
	Development project “Catalyzing investments for tourism and urban development”										
20.	Implement projects of ARIS and TDSF for the construction of rest points in the Osh Region, including:			-							PRP KR in Osh province, Osh Mayor’s Office
	20.1. Construction of 11 TDSF rest points	Implementation of construction and commissioning activities	units degree of implementation (%)	0	5 45	6 55	- 	- 	- 	11 100	TDSF KR
	20.2. Construction of 3 ARIS rest points	Implementation of construction and commissioning activities	units degree of implementation (%)	0	1 66	2 33	- 	- 	- 	3 100	ARIS
21.	Implement the infrastructure projects proposed within the framework of the STDSP to modernize the main	Implementation of construction and commissioning activities	units degree of implementation (%)	0	1 9	3 25	4 33	3 25	1 8	12 100	PRP KR in Osh province, Osh Mayor’s Office TDSF KR ARIS

No.	Tasks (Actions)	Description of the indicator	Unit	Basic year 2023	Interim (annual) indicators					Outcome indicators or targets	Responsible sides
					2024	2025	2026	2027	2028		
	tourist destinations (Pamir-Alay ski complex, Duldul- At, Kojokelen, etc.) (see Appendix 3 b).										
22.	Study the issue of comprehensive modernization of Osh international airport, including the construction of a new terminal and a multimodal transport center based on it	Implementation of construction and commissioning activities in the event of a decision to implement the project	degree of imple- menta- tion (%)	0	-	-	-	At least 30	At least 100	100	DoT Tourism FUGI under MEC KR MTC KR Osh Mayor's Office PRP KR in Osh province
23.	Develop a program to increase the attractiveness of bus stations in Osh city	Carrying out construction and commissioning activities in the event of a decision to implement the project	degree of imple- menta- tion (%)	0	-	At least 50	At least 100	-	-	100	Osh Mayor's Office MTC KR



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