



OBSTACLES TO THE TOURISM DEVELOPMENT IN KYRGYZSTAN

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Abstract

This study aims to discuss main obstacles to the tourism development in Kyrgyzstan. In this study the Kyrgyz tourism industry has been examined. It is found that Kyrgyzstan has a great tourism potential especially for winter and adventure tourism. Moreover, the country has also potential for resort tourism with its beautiful Issık Kul Lake in the middle of Central Asia. Analysis of tourism development shows that although the country has potential for tourism development, there are obstacles for this development. These are seasonality of tourism, limited market, shortages of qualified human resources, lack of sufficient number of modern accommodation establishments and political unrest. The study concludes with a number of recommendations to overcome these barriers.

Key Words: Kyrgyzstan, tourism development, obstacle.

KIRGIZİSTAN'DA TURİZMİN GELİŞMESİNDEKİ ENGELLER

Özet

Bu çalışmada Kırgızistan turizminin gelişmesine etki eden engeller tartışılmıştır. Bu engelleri ortaya koyabilmek için Kırgız turizm endüstrisi incelenmiştir. Bu inceleme sonucunda ortaya çıkan bulgulara göre Kırgızistan'ın özellikle kış ve macera turizmi olmak üzere büyük bir turizm potansiyeline sahip olduğu anlaşılmaktadır. Bir başka bulgu ise Issık Göl Orta Asya'nın merkezinde Kırgızistan için resort turizm potansiyeli sunmaktadır. Kırgızistan turizm potansiyeline sahip olmakla beraber bu potansiyelin değerlendirilmesine etki eden birtakım engeller mevcuttur. Bu engeller şunlardır; turizmin mevsimsellik özelliği göstermesi, kısıtlı pazar, nitelikli personel eksikliği, yeterli sayıda modern konaklama işletmelerinin olmaması. Çalışmanın son bölümünde bu engellerle baş etmek için birtakım öneriler ortaya konmuştur..

Anahtar Kelimeler: Kırgızistan, turizm, gelişme, engel.

1. Introduction

International tourism is one of the important industries of the world economy. According to World Travel and Tourism Council (<http://www.wttc.org/2004tsa/frameset2a.htm>), in 2004,

travel and tourism is expected to generate US\$ 5490.4 billion of economic activity, 10.4% of total GDP, 214,697,000 jobs or 8.1% of total employment, 12.2% of total exports in the world. Many countries are investing to the tourism industry to get more shares from world tourism revenues. There is a big competition between tourist destinations. International tourism has been shown as an option for economic growth for developing countries. Of course international tourism is not a panacea for developing countries. There are positive and negative sides of it. International tourism is an important revenue source and employment creator not only for developing countries but also developed countries. The effect of international tourism on destination countries has been studied widely in tourism literature from different perspective. Economic effects (Sadler & Archer, 1975; Jenkins, 1982; Witt, 1987; Snow & Wall, 1993; Archer & Fletcher, 1996; Wagner, 1997; Frechtling & Horvath, 1999; Sugiyarto, Blake & Sinclair, 2003), socio-cultural effects (Butler, 1974; Dogan, 1989; King, Pizam & Milman, 1993; Teo, 1994; Ryan, 1998; Brunt & Courtney, 1999) and environmental effects (Jafari, 1974; Cohen, 1978; Travis, 1982; Holder, 1988; Green, Hunter & Moore, 1990; Sun & Walsh, 1998; Summerwille, 2004) of international tourism from positive and negative sides have been the main research areas. In the tourism literature, especially, some countries have been studied widely and been given more attention as a case study area such as Greece (Loukissas, 1982; Papadopoulos & Mirza, 1985; Tsartas, 1992; Nikolaos, 2004), Kenya (Summary, 1987; Dieke, 1991; Sindiga, 1996; Ondimu, 2002; Akama & Kieti, 2003), Turkey (Uysal & Crompton, 1984; Liu, Var & Timur, 1984; Tosun & Jenkins, 1996; Tosun, 1998; Tosun & Timothy, 2001). After dissolution of former Soviet Union, new countries emerged namely Azerbaijan, Armenia, Belarus, Georgia, Kazakhstan, Kyrgyzstan, Moldova, Russia, Tajikistan, Turkmenistan, Uzbekistan and Ukraine. These countries created the Commonwealth of Independent States in 1991. During the Soviet Union period these countries had a closed economic system. Now, they are adopting their economy to free market economic system. Because a transformation process is taking place in these countries, they can be an interesting case study area for many academic disciplines such as economy, sociology, psychology, as well as tourism. There is gap in the tourism literature on the former republics of Soviet Union. This is a descriptive study and aims to examine development of tourism in Kyrgyzstan. This examination will be based on secondary data and authors' own observations.

2. The Kyrgyz Tourism Industry

Kyrgyzstan is a small country with an area of 198,500 sq km. The republic is located in the middle of central Asia, bordered by Kazakhstan, Uzbekistan, Tajikistan and China. The population of the country is around 5 millions. It is a new republic which was gained its independence from former Soviet Union in 1991. The republic has chosen free market economy as an economic system. Kyrgyzstan was one of the first former Soviet Union countries to join the World Trade Organization in 1998. Since independence, it has been struggling to adapt its economy to free market economic system. The country's economic system is still in transition. Tourism as an industry is a new phenomenon for the Kyrgyz government, entrepreneurs and people. Many concepts in tourism such as marketing, service management, human resource management, service quality, tourist etc, are not well known. However, this is a transition process and it will take time and efforts. By 2001, the government put the tourism industry on his agenda to take necessary measures to develop it and had outlined its vision for the further development of tourism in Kyrgyzstan in a document entitled: 'Development of the Tourism Sector of the Kyrgyz Republic Until 2010' (KSATS, 2001). However, it is not an easy task to achieve. Below is an overview of the Kyrgyz tourism industry.

2.1. Tourism Potential

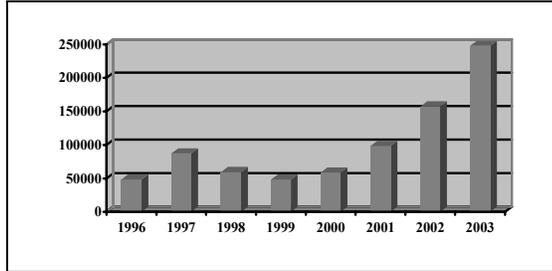
The republic has a considerable tourism potential and provides great opportunities for both domestic and international tourism development. Ninety-five percent of the country is covered with mountains, and some of the highest peaks in the world can be found in Kyrgyzstan. The country's nature is unexplored and unspoiled and it is still relatively unknown as a tourist destination. The mountains, rivers, lakes, and waterfalls of the country make the Kyrgyz Republic the Switzerland of Central Asia. One of the most incredible things about the country is that one can find all climates and all seasons there, and that often at the same time. In the summertime, visitors can swim in the Lake Issyk-Kul (Warm Lake), and then drive ten miles up in the mountains and go skiing. Kyrgyzstan has great potential for winter-tourism with its beautiful snow-covered mountains. The country is a skier's paradise. Lake Issyk-Kul is one of the largest fresh water lakes in the world and it is also the world's second largest alpine lake, after Lake Titicaca in South America. The country has also unique cultural attractions. Kyrgyzstan is the most suitable place for tourists who want to spend their holiday as nomads. Tourists can stay at Yurt (A type of accommodation unit), ride horses, drink and eat local food and beverage as far away from modern world.

2.2. Tourism in the Economy

The tourism industry is rapidly growing and becoming one of the priority areas of the republic's economy. The number of tourists visiting the country (Figure 1) and the money earned from tourism are increasing (Figure 2). The number of tourists was 48,601 in 1996 and it reached to 247,590 in 2003 with a 509% increase in eight years period. However, there was a decrease in tourist arrivals in 1998 and 1999. There are some explanations for this decrease. The reason for decrease in tourism arrivals in 1998 is two fold. First is the Russian economic crisis. Russia is one of the major tourist generating country to Kyrgyzstan. Russian tourists may be cancelled their travels to the republic. However, there is no available published data or information about the figures by nationality of visitors traveling to Kyrgyzstan for the year 1998. Second is an accident that happened on May 20, 1998. This has a more impact than Russian economic crisis on the decrease of tourist arrivals.

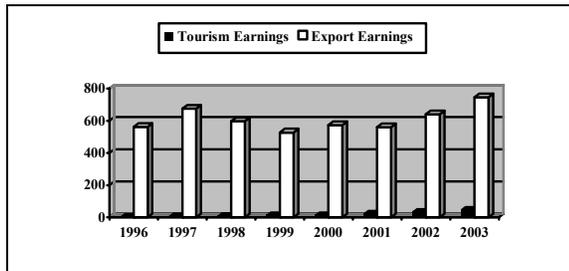
According to Norlen (2000), on May 20, 1998, a KOC transport truck carrying potentially lethal sodium cyanide crashed through a bridge en route to the Kumtor mine, plunging into the Barksoon River and spilling nearly two tons of cyanide into the river. Downstream at Lake Issyk-Kul, Kyrgyzstan's leading tourist attraction, revenues plummeted as vacationers cancelled trips amid fears that the lake might also be poisoned. Regardless of whether all these fears were warranted, the social and economic consequences of the panic were quite real.

According to the figures of National Statistics Committee of Kyrgyz Republic (2001), the number of visitors visiting Kyrgyzstan for leisure and recreation purposes was 41,288 in 1997. The number dropped to 8,225 in 1998. This is a good example for how an environmental problem has an immediate impact on a country's tourist arrivals. The reason for decrease in 1999 can be the hostage crises in August when dozens of gunmen crossed into Kyrgyzstan from neighboring Tajikistan, seized a village and took at least six hostages, including four Japanese geologists. Possible continues effect of Russian economic crisis on Russian tourists can be another reason for the decrease in tourist arrivals to the country in 1999.

Figure 1. Tourist Arrivals to Kyrgyzstan from 1996 to 2003

Source: National Statistic Committee of Kyrgyz Republic (2001) *Tourism in Kyrgyzstan*, Bishkek (Национальный статистический комитет Кыргызской республики (2001) *Туризм в Кыргызстане*, Бишкек)

National Statistic Committee of Kyrgyz Republic (2004) *Tourism in Kyrgyzstan 1999-2003*, Bishkek (Национальный статистический комитет Кыргызской республики (2004) *Туризм в Кыргызстане 1999-2003*, Бишкек.)

Figure 2. Export and Tourism Earnings from 1996 to 2003 (Million US Dollars)

Source: National Statistic Committee of Kyrgyz Republic. (2001) *Tourism in Kyrgyzstan*, Bishkek (Национальный статистический комитет Кыргызской республики (2001) *Туризм в Кыргызстане*, Бишкек)

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During the period from 1996 to 2003, increase in tourism earnings is 1138%. Tourism income was 4.2 million US dollars in 1996 and it reached to 47.8 million US dollars in 2003 (Figure 2). The contribution of tourism to the economy is noteworthy. The share of tourism earnings in export earnings is increasing each year (Figure 2). The share was 0.74% in 1996 and it increased to 6.4% in 2003.

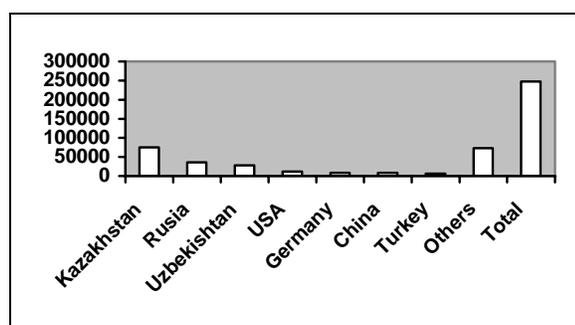
Regarding the tourism employment, official figures of National Statistics Committee of Kyrgyz Republic (2004) show an interesting picture in terms of interrelated tourism

data. Although, tourism arrivals and revenues have been increasing each year, there has been a decrease in registered direct tourism employment. In 2001, tourism arrivals and registered direct tourism employment in hotels, spas and travel agencies were 98,558 and 7404, respectively. In 2002, tourism arrivals reached to 157,211 with a 59.5 percent increase. In this year, tourism employment dropped to 6872 with a 7.1 percent decrease. In 2003, there were again an increase in tourism arrivals and a decrease in tourism employment. Arrivals went up 247,590 with a 57.4 percent increase. On the other hand, tourism employment dropped to 6635 with a 3.4 percent decrease. It is an unusual thing that how can tourism employment figures decrease while tourism arrivals figures are increasing. The possible explanation can be that tourism establishments do not want to employ registered workers because of their financial costs. The employment figures do not represent the actual numbers. There must be many unregistered employees working in the Kyrgyz tourism industry. Therefore, it is difficult to make any reliable evaluation on the employment creation effect of tourism in Kyrgyzstan by taking into account the official registered tourism employment figures.

2.3. Market Structure

Majority of tourists traveling to Kyrgyzstan are from former republics of Soviet Union. Tourists from Kazakhstan (30.4%), Russia (14.6%) and Uzbekistan (11.4%) make 56.4% in total tourist arrivals in 2003 (Figure 3). Lake Issyk-Kul was the main resort during the Soviet period. It is still a popular tourist destination for tourists who come from neighboring countries of Kyrgyzstan. The figures show that the main market for the Kyrgyz tourism industry is countries of former Soviet Union. When the figures related to the purpose of visit are examined, it can be seen that tourism is the main motive to travel to Kyrgyzstan for majority of visitors from countries of CIS. In 2000, total tourist arrivals were 58,756. Tourists from CIS and others countries constituted 40,375 and 18,381, respectively. The shares of tourism and business purposes arrivals within total arrivals from CIS are 76.2% and 23.8% respectively. On the other hand, business purposes traveling is the main motive for visitors from other countries in that year. The shares of tourism and business purposes arrivals within total arrivals from other countries are 22% and 78%, respectively (National Statistic Committee of Kyrgyz Republic, 2004)

Figure 3. Tourist Arrivals by Nationality in 2003



Source: National Statistic Committee of Kyrgyz Republic (2004) *Tourism in Kyrgyzstan 1999-2003*, Bishkek (Национальный статистический комитет Кыргызской республики (2004) *Туризм в Кыргызстане 1999-2003*, Бишкек.)

2.4. Obstacles to Tourism Development

Although Kyrgyzstan has great potential, there are a number of barriers for the development of tourism. These are seasonality of tourism, limited market, shortages of qualified human resources, lack of sufficient number of modern accommodation establishments, and political unrest.

Seasonality of tourism: There are no statistical data about tourist arrivals to Kyrgyzstan by months. However, according to opinions of academics and experts in the field of tourism and hotel management, tourism season is short in Kyrgyzstan and majority of tourists comes between June and September. Particularly, the lake Issyk-Kul as a resort destination attracts tourists between July and August. Seasonality creates a number of problems for the Kyrgyz tourism industry. First is the difficulty in attracting and keeping the skilled employees who prefer all-year employment. This results in employment of unskilled workers in tourism establishments. Thus, quality of services which is necessary for the satisfied customers cannot be achieved. Second is the difficulty in attracting investors. Seasonality creates unused capacity of accommodation establishments. This restricts return on investment. Most of the accommodation establishments particularly around Lake Issyk-Kul were out of western standards. They need investments to be modernized.

Limited Market: When tourism statistics are examined, it is seen that the Kyrgyz tourism industry depends on tourists from CIS countries, mainly Kazakhstan, Russia and Uzbekistan. Big part of these tourists comes to Lake Issyk-Kul region for resort tourism. It is difficult to attract western vacationers to Lake Issyk-Kul region for resort tourism. The region is far from main tourist generating countries. It cannot compete with other destinations offering sea, sun and sand. The resort seems continue to be a destination in terms of sea, sun and sand only for former republics of Soviet Union. Kyrgyzstan has a great tourism potential for winter tourism for skiers and adventure and recreation tourism for climbers. Winter tourism can attract western tourists if the required infrastructure can be developed.

Shortages of qualified human resources: In Kyrgyzstan tourism education have been given at the college and university level. Main problems of these schools are lack of qualified lecturers and laboratories which is necessary for practical courses. Tourism is a new phenomenon for the Kyrgyzstan. The number of lecturers who has tourism education is limited. Wages in colleges and universities are very low so it is difficult to attract them to work as a lecturer. Another problem is bribing. Although, there is no specific research on bribing in Tourism schools, there is a research on bribing in universities in general (Romanchuk, 2002). Tourism schools in Kyrgyzstan cannot be exempt from general situation. Student can get good grade and diploma by bribing lecturers without studying. All these problems can result in unskilled graduates so the shortages of qualified human resources in the tourism industry. Another problem is the control and management of tourism development in the country. This is closely related to the availability of qualified human resources. In the country, tourism is under control of the State Committee of the Kyrgyz Republic for Tourism, Sport and Youth Policy. The committee has not enough qualified human resources to accomplish its obligations. Skilled human resources are

necessary to make tourism development plans and to carryout them. Especially, at the beginning of tourism developments state authorities must have pioneer role to guide entrepreneurs.

Lack of modern accommodation establishments: During the Soviet times, Issyk-Kul was receiving about 800 thousand people from other republics of the former Soviet Union. There are around one hundred health spas, or sanatoriums, around Lake Issyk-Kul, left over from the Soviet days. These establishments were belonged to trade institutions and other institutions. Most of them were privatized, some not. They need investments to bring them into western standards. However, there are a number of new accommodation establishments in Bishkek and Issyk-Kul region and new constructions are taking place. In other cities of the country, there are no modern accommodation establishments.

Political unrest: After the independence the country was governed by President Akayev until the Tulip Revaluation that took place at 24 of March in 2005. After the revaluation, Akayev run away from the country. In the months leading up to the July, 2005, presidential election, the country experienced an increased level of civil unrest as the provisional government struggled somewhat to establish its control, and the unrest continued from time to time through the rest of 2005. The political situation is still somewhat tenuous and interethnic tensions and violence appears to be increasing. This political unrest may result in the decrease of tourist arrivals and delay of tourism investments. However, it is difficult to assess the revolution's longer term impact on the development of tourism in Kyrgyzstan.

3. Conclusions and Recommendations

An examination tourism development in Kyrgyzstan shows that the country has a great tourism potential for resort-recreational tourism and adventurous and mountain tourism (mountain climbing, rafting, mountain skiing, eco-tourism, etc.). Although, the republic has great potential, problems mentioned above are barriers to the development of tourism. A number of recommendations can be made for the development of the Kyrgyz tourism industry.

Firstly, Issyk-Kul region must be given priority attention. There is a need for the modernization of olds and construction of new accommodation establishments in this region. Of course this requires money to invest. Some special financial and fiscal incentives can be given to investors to attract them to the tourism industry. Regarding this region, particular attention should be given to "Cholpon-Ata" airport in the center of the resort area. The renewal of former routes connecting Issyk-Kul with the capitals and big cities of Kazakhstan, Uzbekistan and other Central Asian countries is needed. This region can be also a center of congress tourism in central Asia if the required facilities for this type of tourism are provided. This will help to extension of tourism season in the region.

Secondly, tourism education must be given importance. The level of services provided by the resort and recreational institutions are far from the world standards. This can be achieved by quality of service personnel. There is need for foreign assistance to improve quality of education in tourism schools. A program about education of tourism educators is needed. Then educated educators can educate others. There are no universities or colleges which have practice hotel. Thus, tourism schools' physical structure must be improved. The state may give a support to a university which has a tourism department to establish a practice hotel.

Thirdly, like with many other parts of the Kyrgyz tourism industry, the infrastructure for winter-tourism must be developed if the country is going to attract any crowds of skiers. The government of republic should give special incentives to investors to attract them.

In terms of marketing, there is a need for promotional activities by stressing the distinctiveness of the country. The strategies need to be segment based. With limited budget, the focus of the promotional efforts has to be the intermediaries in the forms of tour operators and selected travel agents in target countries.

In conclusion it can be said that a well-developed travel and tourism industry could spur much-needed economic growth for Kyrgyzstan if the necessary measures are taken.

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