

**Tourism Public Planning and Policy in
Tajikistan
and its Impact to the National Economy**

by

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DECLARATION

I, AMONOVA Shirin Graduate Student of the Ritsumeikan Asia Pacific University, hereby declare that this thesis titled “Tourism Public Planning and Policy in Tajikistan and its Impact to the National Economy” is the result of my own work accomplished under supervision of Professor TSUKADA Shunso.

I, also declare that this thesis has not been submitted in any form for other degrees. All literature and information used in this paper are properly acknowledged and referenced.

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LIST OF ABBREVIATIONS

ADB- *Asian Development Bank*

CIS-*Commonwealth Independent States*

CSTO- *Collective Security Treaty Organization*

Com.YST - *Committee of Youth, Sport and Tourism*

EEC - *Eurasian Economic Community*

GDP - *Gross Domestic Product*

GoRT - *Government of the Republic of Tajikistan*

IICTS - *Improvement of Investment Climate in Tourism Sector*

MEDT - *Ministry of Economic Development and Trade*

MoFA - *Ministry of Foreign Affairs*

MLME - *Ministry of Labor, Migration and Employment*

NATO - *North Atlantic Treaty Organization*

NBT - *National Bank of Tajikistan*

OSCE - *Organization for Security and Cooperation in Europe*

TajStat - *Statistical Agency under President of the Republic of Tajikistan*

UN - *United Nations*

UNESCO - *United Nations Educational Scientific and Cultural Organization*

UNWTO - *United Nations World Tourism Organization*

WB - *World Bank*

WEF - *World Economic Forum*

WG - *Working Group*

WTTC - *World Travel and Tourism Council*

ABSTRACT

This Study reviews theoretical and conceptual studies existing in the literature on tourism public planning and policy as well the role of governments in tourism planning. Concrete actions have been taken in the Republic of Tajikistan by the Government to develop tourism. In particular, several international tourism areas have been established, hotels and trading centers meeting modern requirements have been constructed and steps have been taken to ease access to the Republic of Tajikistan. The Study examines the applicability of TALC Model introduced by Butler in 1980 to the current tourism conditions of Tajikistan. The Multiplicative Model of Time-series Forecasting has been applied for the prediction of tourist numbers, and their contribution to Tajikistan's GDP for the 2016-2020 periods, on basis of quarterly trend data for 2011-2015. Results indicate that the current tourism situation in Tajikistan is at the involvement stage and moving to development stage of TALC evolution. Government of the Republic of Tajikistan is the main player for tourism development for moving from one to another stage. Limitations of this study are outlined from organization of the study.

Keywords: Tourism public planning and policy; tourism contribution to GDP; TALC Model, Multiplicative Model of Time-series Forecasting, Tajikistan

CHAPTER 1. INTRODUCTION

1.1 Background of the Study

This Study offers an approach to understanding the importance of tourism for development in the Republic of Tajikistan, with the attempts to explore tourism potential, tourism growth and opportunities for future tourism development in the Republic of Tajikistan. The scope of this study includes public planning and policy, as well as measures taken by the Government of the Republic of Tajikistan to better the image of the country during the Independence period.

During the transition period, the Republic of Tajikistan inherited a weakly developed tourism policy, which is not able to meet the requirements of a market economy. Republic of Tajikistan faced many socio-economic problems after the collapse of the Soviet system. In order to tackle these problems, the Government of the Republic of Tajikistan has been introducing new policies supportive of globalization, with the aim of further integration of the country to the World Economy. As of now The Republic of the Tajikistan has become a member of United Nations specialized agencies and organizations (UN), Commonwealth of Independent States (CIS), Eurasian Economic Community (EEC), Organization for Security and Cooperation in Europe (OSCE), North Atlantic Treaty

Organization (NATO), Collective Security Treaty Organization (CSTO), as well financial and economic institutions.

Not until 1996 did the development of tourism within the Republic of Tajikistan have a commercial character. In January 2001, with the purpose of developing the tourism industry into a cornerstone of the economy, the Order of the President of the Republic of Tajikistan was passed, in which functions of State management on tourism had been assigned to the Ministry of Economy and Trade of the Republic of Tajikistan. During this period, development of the industry was undermined by various issues and challenges. Most serious of all is weak management, both on tourism industry and on its related sectors, which completely drained the main funds for tourism infrastructures and promotion, leading to inadequate informative-advertising works abroad to introduce the newly Independent country to potential international tourists.

In 2006, under the Resolution of the Government of the Republic of Tajikistan the Committee on Youth, Sport and Tourism under the Government of the Republic of Tajikistan was established as the administrative body of tourism and its jurisdictional related agency - State Unitary Enterprise "Sayyoh". With the support of the Government of the Republic of Tajikistan, the justifiable tendency

of tourism growth started in the Republic of Tajikistan.

In 2007 Republic of Tajikistan became an official member of UNWTO. This membership obliged the Republic of Tajikistan to bring its regulations in the field of tourism in line with international standards of tourism. Obligations of the Government of the Republic of Tajikistan before the UNWTO led to a major overhaul of the existing tourism planning and policy, in order to determine the initial priorities to develop tourism industry.

1.2 Statement of the Problem

During the past years of the 21st century, international tourism has been rapidly growing, and at the same time, many countries have recognized the significance of tourism industry to their economies. Tourism continues to be a key driver of global economic recovery, and a vital contributor to job creation, poverty alleviation, environmental protection and multicultural peace and understanding across the globe. According to the World Tourism Organization (2016), expenditures by 1.2 billion international tourists traveling in 2015 generated US 1.5 trillion on export earnings. International tourism reached new heights in 2015. The robust performance of the sector is contributing to economic growth and job creation in many parts of the world. It is thus critical for countries to promote

policies that foster the continued growth of tourism, including travel facilitation, human resources development and sustainability (WTTC, 2016).

1.3 Research objectives

The main objective of the research is to find out the role of the Government of the Republic of Tajikistan in rational public planning and policy of tourism industry, current impact of tourism on the national economy of the Republic of Tajikistan, as well as an appropriate structure for the sustainable development of tourism industry in the Republic of Tajikistan. The outcome of the research shall be comprehensive guidelines for the development of tourism in Tajikistan, including recommendations for legislative amendments, and institutional and administrative arrangements, which would be necessary in order to foster development. This study also aims to determine existing problems and difficulties facing the Government of Tajikistan to develop and improve tourism conditions, so that it could undertake necessary and special efforts to develop policy and planning in the tourism sector.

1.4 Research Question and Hypotheses

Practice of many countries shows that rational public planning in tourism is contributing positively to the national economies. The research therefore, focuses

on answering the following questions:

- What is the role of the Government of the Republic of Tajikistan on public planning and policy on tourism?
- What are the contributions of tourism to the national economy of Tajikistan?

Thus, this research has two hypotheses:

1. The provided public planning and policy would increase the number of international tourists to the country in 2016-2020.
2. The number of tourists increased and it would be a possible significant contribution to the GDP growth.

1.5 Theoretical and Conceptual background

Tourism has been regarded as an engine for growth and poverty alleviation. Tourism Area Life Cycle (TALC) Model of Butler is used to explore the stages of tourism development. The TALC suggests that destinations evolve through a number of stages, depicted in the model as a life cycle that starts from the “birth” of tourism in a destination (Minnaert, 2012)

Both developed and developing countries design their policies to generate benefits from the tourism industry (Chheang, 2009). Although tourism is an activity sustained mainly by private initiatives, governments have traditionally played a key role in its development (UNWTO, 1996). In many developing

countries, the state usually plays a central role in formulating and planning tourism policy. Concrete actions have been taken in the Republic of Tajikistan by the Government to develop tourism. In particular, several international tourism areas have been established, hotels and trading centers meeting modern requirements have been constructed and steps have been taken to ease access to the Republic of Tajikistan.

1.6 Organization of the Study

This Chapter introduces the background of the Study, as well as the research problems and research questions. Chapter two consists relevant literature to public planning on tourism development, the theoretical and conceptual framework of Butler's Tourism Area Life Cycle Model (TALC), and normative rules and regulation acts in terms of tourism. Chapter three explores the country's profile, geography, national identity, population, economy and macroeconomic issues. In addition, it also reviews tourist resources, recently recognized UNESCO world and cultural heritage sites of the Republic of Tajikistan, tourism opportunities, tourism sector conditions, and legal and policy framework for tourism, including the arguments over the simplification of visa procedures in the Republic of Tajikistan. Chapter four will focus on the method of data collection

and methodology, particularly descriptive analysis, Multiplicative Model of Time-series forecasting. Chapter five is a discussion of findings, and suggestions on how to deal with the factors which are adversely affecting tourism growth. Chapter six presents the final part of the Study, comprising the limitations of the study, recommendations and conclusion.

CHAPTER 2. LITERATURE REVIEW

2.1 Introduction

This part of the research is a comprehensive review of academic studies that have been done on governments' role in tourism planning, tourism policy, issues of strategic planning of tourism sector, as well as the reports of World Travel and Tourism Council and UN World Tourism Organization.

The purpose of planning as defined by Hall (1970), is “an ordered sequence of operations, designed to lead to the achievement of either a single goal or to a balance between several goals”. Another definition provided by Dredge (2007), “strategic activity comprising a number of stages that lead to the determination of a course of action to meet pre-determined goals”. Developing continuous conceptual frameworks is one of the main roles of the Governments in identifying directions for future sustainable growth.

2.2 The role of the Governments in Tourism planning

Governments are the main designers of the public planning for the growth of tourism. Edgell (2008) argues that, policy, when properly applied, is a vehicle for a government to direct and stimulate the tourism industry.

Today tourism is considered as an important instrument for growth and

poverty reduction. A large number of studies explore the role and the position of the governments in tourism planning and management in the countries with developed tourism industry. Example to this, are the “The Discourse of Power”, ”Vietnamese state and tourism development in Vietnam in 1990s after Doi Moi”, “The role of the state in providing education to develop sustainable tourism in Thailand”, “State and tourism promotion in Malaysia”, “The public sector and environmental management of tourism in Bintan Island, Indonesia”, “The role of the state in tourism development in the Philippine after the Marcos era”, ” The role of the Laotian government and the development of ecotourism and heritage tourism in Lao”, “Singaporean government policy in promoting tourism in Singapore” (Chheang, 2009).

Generally, tourism researchers highlight different types of plans. Pearce referred to Gets, who defined tourism planning as “...a process based on research and evaluation, which seeks to optimize the potential contribution of tourism to human welfare and environmental quality” (Douglas, 1989). However, Braddon (1982) stated that “...tourism is a social, economic and environmental activity. Its planning has to operate at various levels; nationally, regionally, locally. ...it is important that the right economic conditions exist for development to take place in

accordance with the plan. It is also important that tourism planning is market – oriented, providing the right product for the consumer- tourist”.

Recognition of the importance of planning for tourism activities was emphasized in the established inventory of UNWTO (1980) for tourism plans, in different scales and classified into five categories: intraregional, national, regional, local and sectoral; and at each scale different types of plans have been formulated. For example, as Douglas (1989) pointed out, there may be four sub-plans at the national level, which include National Infrastructure Plan, National Tourism Development Plan, Tourism Infrastructure Plan, and National Promotion and Marketing Plan.

2.3 Tourism development impacts

In the literature, tourism has been found to have more positive outcomes than its negative impacts. As was highlighted in United Nations Environment Program, “it is one of the world’s most significant sources of economic outcomes and employment”. However, tourism is a very complex industry involving numerous stakeholders and requiring significant amount of resources. But if managed well, tourism can play a significant role in the socio, cultural, economic, environmental

and political development of the destination and such represents a significant development opportunity for many countries and communities (UNEP, 2016).

The important role of tourism industry in the economic and technological development of nations and its impacts marked by Edgell (1990), who noted “tourism stimulates the development of basis infrastructure (airports, harbors, roads, sewers and electrical power), contributes to the growth of domestic industries that supply the tourism industry (transportation, agriculture, food processing, commercial fishing, lumbering construction), attracts foreign investment (hotels, facilitates the transfer of technology and technical know-how”.

2.4 Tourism and Economic impacts

Economic impacts associated with tourism arise as a result of the demand and supply relationships in the industry, the associated visitor and investment expenditure patterns that they stimulate, and the structure of the economy. The demand/supply factors influence the number of visitors, their length of stay, and their expenditure patterns while the economy’s structural characteristics determine its propensity to re-circulate those expenditures internally (Ardahaey, 2011).

The impact of tourism on the economy is significant, since it “creates

jobs, reduces unemployment fosters entrepreneurship, stimulates production of food and local handicraft, demands effective communications, facilitates cultural exchanges and contributes to the better understanding of the local area, state, province, country and the world at large” (Edgell, 2008).

Worldwide, developing countries are recognizing the potential growth afforded by the tourism industry. Before we consider how tourism affects a destination economy, it is useful to understand how these impacts are described by economists. As Minnaert (2012) argued, “The economic effects of any sector on an economy can be direct, indirect or induced”. In the same vein, Vanhove (2005) classified the economic contributions of tourism into six types: income generation, employment generation, tax revenue generation, balance of payment, improvement of the economic structure of a destination region and encouragement of entrepreneurial activity. Firstly, income generation can be interpreted as how and where cash flow could be generated from tourism activities, while employment generation meant quantity of jobs created via tourism activities, categorized in terms of quality of these jobs, as well and the type of employees that work in them. Next, what the author meant about tax revenue generation is the income that the

government generates from fiscal policy and taxes on tourist activities, products, and services. Regarding balance of payments there should be a record of the financial transactions between the country and the other countries and as for the improvement of the economic structure is mentioned the improvement on all the linkages between tourism and other economy sectors. Another economic impact of tourism is the expansion of entrepreneurial activity, which means businessmen in the host community may start and or expand their businesses related to tourism if they see the opportunity for potential growth.

The World Travel and Tourism Council (WTTC), for the period of 25 years, have been quantifying the economic impact of travel and tourism. This year the number of countries surveyed by the report achieved 184 from 25 regions of the world. Based on the annual report of WTTC for 2015, travel and tourism generated US\$ 7.6 trillion (10% of global GDP) and 277 million jobs (1 in every 11 jobs) for the global economy in 2014. In recent years, tourism has consistently outgrowing other major sectors such as automotive, financial services, or health care. 2015 was no exception, international tourist arrival reached an all-time high of 1.14 billion (WTTC, 2016).

2.5 Theoretical foundation: Butler's Tourist Area Life Cycle (TALC)

Process frameworks have been widely employed in various fields of tourism research, such as development, planning, travel decision-making and distribution (Pearce, 2012). Butler developed a Model of Tourist Area Life Cycle (TALC) in 1980, which demonstrates the process of change in destinations. The TALC suggests that destinations evolve through a number of stages, depicted in the model as a life cycle that starts with the "birth" of tourism in a destination (Minnaert, 2012).

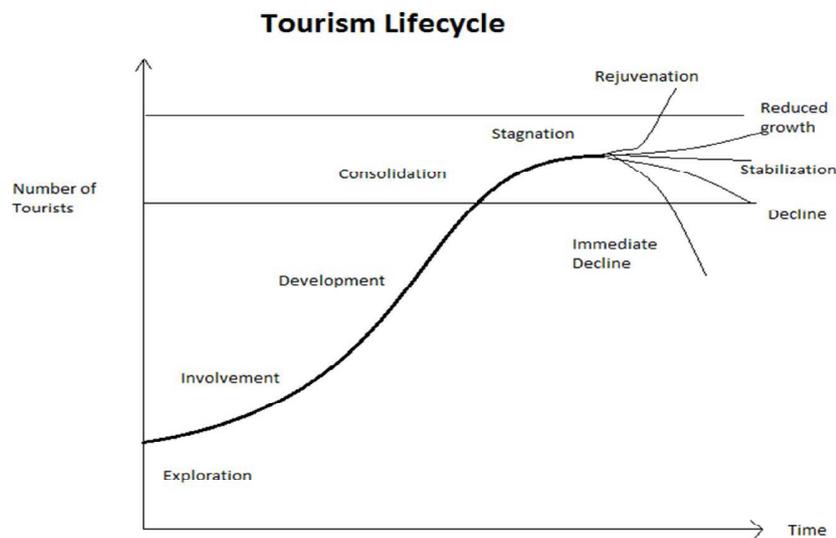


Figure 2. 1 Butler's TALC Model. Source: Reprinted from Tourism Management. Minnaert (2012)

The TALC Model covers six stages to the lifecycle, including exploration, involvement, development, consolidation, stagnation and decline (Minnaert, 2012).

Exploration: At this stage, there is no clear visitor pattern during any given period. Tourist sites remain virtually unchanged in terms of appearance and no visible impact of tourism on the life of the host community can be observed, both socially and economically.

Involvement: Facilities begin to be constructed solely for tourists by the local community, with a harmonious relationship between the two, particularly those who are involved in tourism directly. At this stage we can also see distinct tourist seasons, wherein service providers adjust their operation accordingly. Promotion is also implemented widely to boost growth in certain regions. Not only that, tour operators and travel agencies will also begin to emerge at this stage. Finally, the governments and relevant bodies will be pressured to improve or provide certain services.

Development: Regions which perform well economically will be identified, where larger investments will be made for more modern and bigger facilities. Man-made attractions will be built to complement natural and cultural

beauty spots, such as amusement park, shopping malls, or nightlife district. At this phase the region's outlook will be altered drastically, which may trigger a wave of tourism opposition from the local community. Decisions regarding changes to the region will be made by higher-up authorities, most likely the national governments. Immigration will also increase rapidly to meet demand for peak seasons.

Consolidation: The number of visitors now overwhelms the region's population, but growth begins to slow down. Tourism now contributes the majority of income for the region, and aggressive marketing used to prolong season and to attract more tourists. Facilities mainly come from national and international chains, while some others may be seen as outdated and unwanted. Parts of the community will protest against such tourism-based economy, especially citizens who do not benefit from the industry.

Stagnation: Growth ceases and facilities fail to keep up with the number of visitors, causing social, environmental and economic burden. At this stage the destination may be well known but starting to fail in competing against other newly developed regions.

Decline: Destination experiences a fall in tourists' number and length of stay, as holidaymakers are replaced by day trips and short stays. Facilities for

tourism begin to be transformed into other businesses, adversely affecting the remaining tourism plan.

The TALC, as defined by Minnaert (2012), “*is a hypothetical model derived from Butler’s research and experience of British and Northern European coastal and mountain tourist destinations, during the period that Mediterranean resorts were developing as a competitor destination*”. Having been conducted decades ago, TALC is still widely hailed among scholars as one of the most successful model in the field of tourism study, and cited in studies even now (Hall, 2006).

According to Lagiewski (2006), a total of 48 published studies have assessed the applicability of the TALC, with 15 conducted before 1990, and 33 more during the 1990s.

The TALC Model has been used widely for testing aspects of tourism. Richard Lagiewski listed as many as over 50 tourism life cycle studies following Butler’s theory between 1981 and 2006. Summarizing major TALC studies, Lagiewski synthesized the results of these studies and pointed out: “TALC would be more useful by recognizing a ‘maturity’ stage. Also the model has value by its premise that without appropriate planning, management and development,

destinations will see decline” (Lagiewski, 2006).

Summary

As reviewed in the literature, especially from the TALC model, appropriate public planning and policy will lead to sustainable growth for the tourism industry. Governments, recognizing the importance of tourism as a vehicle for their economic growth, have been taking active measures on tourism policymaking and planning in order to gain more benefits from tourism.

The best arguments for positive impact of tourism to the World Economy were presented by WTTC and UNWTO to the policymakers, to consider tourism as an economic engine for the national economies.

CHAPTER 3. TOURISM INDUSTRY IN TAJIKISTAN

3.1 Country Profile

Republic of Tajikistan has a unique cultural and historical heritage, favorable geographic location, which is also diverse in natural landscapes, and exotic natural habitats. These conditions provide the Republic of Tajikistan huge potential for development of internal and external tourism.

Republic of Tajikistan is located in Central Asia and shares its borders with the Republic of Uzbekistan, Republic of Kyrgyzstan, People's Republic of China, and Islamic Republic of Afghanistan.



Figure 3. 1 Map of the Republic of Tajikistan. Source: MapsofWorld

Republic of Tajikistan is known with its mountains and plateaus which belong to the mountain range of Hisar-Alay, Pamir and Tien-Shan. 93% of the Tajikistan's territory is mountainous area, of which more than half of the mountains are higher than 3000 meters. The Peak of Somoniyon (formerly called Peak of Communism), is 7495 meters high, making it one of the highest peaks in the region. The climate of the country is continental, subtropical and semiarid, with average temperature ranging between 22° and 30° C in July - summer, and from -1° to 3°C in January - winter. The temperature in the Eastern Pamir in July varies between 5° and 10°C, and from -15° to -20°C in winter (Hamdamov, 2013). Dushanbe is the capital of the Republic of Tajikistan. The country is divided into five administrative regions: Dushanbe city (center), Regions of Central Subordination, Sughd oblast, Khatlon Oblast, Gorno-Badakhshan Autonomous oblast (GBAO). The mountainous Badakhshan Autonomous Oblast was established on January 2nd 1925, in the territory of Soviet Tajikistan and is located on the Eastern part of the country (Hamdamov, 2013).



Figure 3. 2 Map of the Republic of Tajikistan: Regions. Source: MapsofWorld

Among all the countries in Central Asia (Kyrgyz, Kazakh, Turkmen, Uzbek), Tajiks is the nation, whose history is connected with the other Eastern continent countries, such as India, Pakistan, Afghanistan, Iran and some Arab countries. Tajik has made a significant contribution to the spiritual treasury of civilization, and is a birthplace to the world outstanding and remarkable scientists, philosophers, writers, poets and architects whose works have become an integral part of the scientific and cultural heritage, accumulated global civilization. One of the most famous and acknowledged individuals must include lyrics founder of Persian-Tajik literature Rudaki, eternal national epic poem "Shahnameh" of Firdausi, who integrates the history of the Persians and Tajiks, and the "Kanun of Medicine" of Abu Ali Ibn Sina (Avicenna), a treaty which for centuries served as the main guide to medical institutions in Europe. Scientists Al Khorazmi, Al

Forobi and Beruni, and the leaders of the world poetry such as Khayyam, Rumi, Saadi, Hafiz, Jami, masters of art Borbad, Mani, Bekhzod were known far beyond the borders of modern Central Asia (Hamdamov, 2013).

According to the 2014 population census, Republic of Tajikistan has a population of 8,296,000 (World Bank, 2014). Republic of Tajikistan formerly belonged to the Soviet Republic and it is multiethnic, however, the majority of population is Tajik (80%). Uzbeks, Russians, Kyrgyz, Tatars, Kazakhs and other ethnicities account for nearly 20% of the population.

3.2 Tourist Resources of the Republic of Tajikistan

The Republic of Tajikistan is the homeland of the highest peaks, powerful glaciers, and swift rapid rivers, unrepeatably in its beauty lakes, unique flora and rare wildlife. Within the country, a half hour flight from the sweltering heat of Vakhsh valley could take tourists to the arctic cold of eternal snows of the Pamirs.

The existence of historical and cultural monuments encode peculiarities formed the national tourism product, promotion and implementation of which in the world markets of tourist services, provides a flow of foreign tourists to Tajikistan. In this regard, priority modes of international tourism in the country are considered:

- Mountain climbing, mountain sports and eco-tourism;

- International hunting;

- Historical and educational and ethnographic tourism;

- A spa treatment and recreation.

Tajikistan, with relatively small territory, has enough complex system of specially protected natural territories. 22 per cent of the territory of the Republic of Tajikistan is particularly protected zones. One of the most important functions of this system is the preservation and the multiplication of the unique natural, historical and cultural heritage of the country for future generations.

Pamir is one of the famous highlands of the world with absolute heights from 2800 to 7495 m above sea level, known worldwide as the "roof of the world". Tourist resources - the highest mountain peaks - Somoni and Korzhenevsky, located at an altitude of 7000 meters, the hunting grounds, natural landscapes, caves and mineral springs of thermal and cold, carbonate and silicate waters. Republic of Tajikistan conducts every year international climbing expeditions, during which the climbers from around the world climb to the highest peaks of the country. Rising to the peak Somoni (7.495 meters) – is the wish of the enthusiastic climbers from all over the world. The unique topography of the region favors the development of hiking trails and trekking of varying degrees of difficulty, engage in special

activities such as rock climbing, hiking, skiing, mountaineering, combined with hunting and photo hunting, white water rafting, paragliding, snowboarding, caving and other types of extreme tourism.

Republic of Tajikistan is the richest country in terms of reserves of fresh water resources. Almost half of the water resources of the countries of Central Asia are formed in high mountain rivers, lakes and glaciers of the country. The Republic of Tajikistan ranks eighth in the world on reserves of hydropower. Especially Gorno-Badakhshan Autonomous Region is very rich in lakes, which have very different origins. The largest of them are Karakul, Zorkul, Rangkul, Shorkul, Bulunkul and Lake Sarez, which was formed by an earthquake in 1911. Pamir is birthplace for the highlands with the altitudes of 3200 to 5000 meters, and concentrated 1450 lakes and 220 rivers. The biggest lake in the Pamirs is a unique salty lake Karakul, located at an altitude of 3914 meters above sea level. Its maximum depth is 236 meters. (Hamdamov, 2013).

Republic of Tajikistan has more than 200 sources of mineral and thermal waters, on the basis of which spa tourism is developed. The most famous of them are resort "Khoja Obi Garm," resort "Bahoriston", sanatoriums "Shahambary", "Obi Garm," "Zumrad", "Havatag", "Yavroz", "Kaltuch", "Garm-Chashma".

Lake Sarez, in the heart of the Pamirs, was formed in 1911 when the side of a mountain was dislodged by an earthquake and fell into the path of a mountain river. The result of the earthquake on 19th February 1911, the side of a mountain dislodged and closed the path of mountain river Murghab in Usoy village. So, on the height of 3239 meters the Sarez lake was formed with the length of 75 kilometers, and total 86,5 square kilometers-with the maximum depth of 505 meters Hamdamov (2013).

One of the main routes connecting nations of Central Asia with other counterparts is the famous Silk Road. Currently, with the aim of the development of international trade, economic and cultural contacts the Great Silk Road has become a symbol of friendship, mutual understanding and good relations between the peoples of the countries along the way.

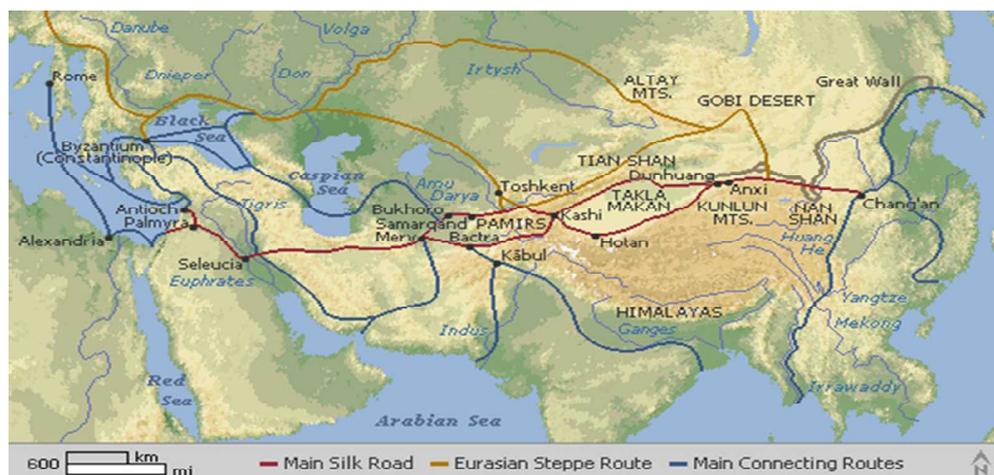


Figure 3. 3 The main routes of the Great Silk Road. Source: (Google Map, 2016)

Tajikistan's territory since ancient times lay on the important historical roots of the Silk Road connecting the East and the West. It played a pivotal role in international trade and cultural exchange, linking the old possessions of Bactria - Taharistan (Chaganian, Shumon, Ahorun, Qubodiyon, Vakhsh, Huth, Rasht, Kumed, Darvoz, Vanj, Rushan and Wakhan), Sughd, Istaravshan (Ustrushana) and Ferghana with India, Afghanistan and China.

The Great Silk Road was not only the exchange of goods between East and West, but also of ideas, cultures and people. (Hamdamov, 2013)

The proto-urban site of Sarazm “demonstrates the existence of inter-regional trade and cultural interchanges over long distances across Central Asia. This was a long lasting and prosperous proto-urban metropolis, at the north-eastern extremity of a vast area stretching from Mesopotamia to the Indus and the Iranian plateau” (UNESCO, 2010)

The proto-urban Site of Sarazm has the legal status of a “Historical and Archaeological Reserve”, as defined by the resolutions of the Government of the Republic of Tajikistan #391 of 21 September 2000 and #198 of 19 April 2001. It is managed by the Penjikent Archaeological Base under the supervision of the Institute of History, Archaeology and Ethnography of the Academy of Sciences of the

Republic of Tajikistan.

Another site of UNESCO World heritage is *Tajik National Park*. It is the largest nature protection area in Central Asia, home to wide ranges of highlands and high-mountain ecosystems. The park was established in 2002, a 2.6 million hectares ecosystem of diverse flora and fauna, including the renowned Marco Polo mountain sheep and snow leopard. Tajik National Park is also well-known for its sheer number of glaciers, encompasses rather big mid-mountain and high-mountain territories, which house 14 types of ecosystems and numerous natural monuments as well. For its uniqueness it was recognized in the World Heritage List of UNESCO in 2013. The park embraces almost the entire Pamir Mountains, the third highest mountain ecosystem in the world after the Himalaya and Karakorum Mountains.

Tajik National Park is also home to a number of outstanding natural miracles, including: Fedchenko Glacier, the longest glacier in the world outside of the Polar Regions; Lake Sarez, a very deep lake impounded just one hundred years ago – in 1911, in the result of earthquake which generated a landslide forming the Usoi Dam, the highest natural dam in the world; and Karakul Lake, likely to be the world's highest large lake of meteoric origin. (UNESCO, 2010).

Moreover, the Government of the Republic of Tajikistan prepared an inventory of sites of “Amir Hamza Khasti Podshoh” – mausoleum, Ancient town of Takhti Sangin, Mausoleu of Khoja Mashhad, Buddhist monastery “Ajinateppa”, Hulbik Palace, Mausoleum of Khoja Nashron, Mausoleum of “Muhammad Bashoro”, Ancient town of Shahristan “Qahqaha”, Fan mountains, Tigrovaya balka, State reserve Dashti Jum, State Reserve Zorkul, Hisor Castle under the name Silk Road Sites in Tajikistan for the further nomination in the world and cultural heritages of UNESCO (Appendix 1).

3.3 Tourism Sector in the Republic of Tajikistan

The main objective of public policy in the Republic of Tajikistan in the field of tourism is to ensure favorable legal conditions for the efficient organization of tourism activities, and on the basis of the establishment in the Republic of Tajikistan of an efficient and competitive tourist market that provides opportunities to meet the needs of internal and foreign citizens.

3.3.1 Tourism Legal and Policy Framework in the Republic of Tajikistan

Republic of Tajikistan participates in the activities of international, inter-parliamentary, inter-regional organizations in the tourism sector as a full,

associate members and observers. Tourist organization of the Republic of Tajikistan may join international tourism organizations in order to: International tourist exchange; development of economic and technical cooperation to strengthen the material base and tourism infrastructure; development of international cooperation in ensuring the safety of tourists; exchange of information on tourism; collaborative research in various areas of international tourism; on other issues of international cooperation in the field of tourism. The establishment of a modern marketing strategy on the development and promotion of the tourism product on the internal and external markets on the basis of national brand is the main task of the development of tourism in the Republic of Tajikistan.

The legal framework for tourism development is strengthened nationally and a number of normative legal documents have been approved by the Resolutions of the Government of the Republic of Tajikistan. According to the Article 7, Law of the Republic of Tajikistan “On Tourism”, the following policies will be implemented by the State agencies of the Government of the Republic of Tajikistan: adopting legal-normative acts, regulating tourist activity in the Republic of Tajikistan, establishment regulations on import and export of tourist services, signing bilateral international agreements on tourism sphere and

establishment implementation regulations, adopting State Programs on tourism development.

The Government of the Republic of Tajikistan, understanding the importance of tourism, adopted number of legal and conceptual documents that define the strategy of tourism development in the country (See Appendix 6).

With the purpose of future revival of international tourism in the Republic of Tajikistan, Government of the Republic of Tajikistan has enacted the Law of the Republic of Tajikistan “On Tourism” (approved by the Parliament of the Republic of Tajikistan on September, 3rd, 1999). This Law defines the legal, economic, social and organizational frameworks, as well rules and regulations of tourist activities in the territory of the Republic of Tajikistan.

State Tourism Development Program for the period 2010-2014 years covers the main tasks, which is to ensure a sustainable development of the tourism industry as a priority sector of economy.

The State Tourism Development Program in the Republic of Tajikistan for the period 2010-2014 was designed with the purpose of exercising the Law of the Republic of Tajikistan “On Tourism”, and founded based on the Document of Strategy of Poverty Reduction in the Republic of Tajikistan (approved by the

Parliament of the Republic of Tajikistan in 2002). The Tourism Charter and Ethic Codes of Tourist introduced by the United Nation World Tourism Organization were also taken into account for the development of the program. The main purpose of the State Tourism Development Program is to facilitate a modern, effective and competitive tourism complex, which is able to satisfy the demands of citizens of the Republic of Tajikistan, as well the foreign citizens in different categories of tourist services.

The Government of the Republic of Tajikistan on 2 April 2009 approved the Concept of Tourism Development in the Republic of Tajikistan over the 2009-2019 periods.

This Concept is aimed at ensuring a supportive legal, organizational and economic environment for the formation of the modern tourist industry of the country, advancement of national tourism infrastructure that is on-par with other regions with similar resources.

In 2014, policymakers in the country initiated an Action Plan on Improvement of Investment Climate on tourism. One of the main tasks mentioned in this Action Plan is the simplification of visa procedures for tourists visiting the Republic of Tajikistan. Accordingly, the Ministry of Foreign Affairs of the

Republic of Tajikistan had explored the possibility of further simplification of the visa policy of the country.

One of the important factors that influence tourism development is to apply adequate procedures for visa and registration of visitors inside the country. The more this process is simplified and accessible, the more the number of visitors increases.

According to the Resolution of the Government of the Republic of Tajikistan from April 3, 2006 order No. 134 “On Actions to Ensure Simplified Procedure for Endorsing and Issuing Visas of the Republic of Tajikistan to Citizens of Several Foreign Countries”, citizens of 68 (later the number of eligible countries increased to 81, the amendments have been done to the mentioned Resolution of the Republic of Tajikistan with the new Resolution №122 from 27 February 2009) the citizens of the enlisted countries on the Resolution are entitled to obtain entry and exit visas for the period of 45 days directly from the Consular Bureau of the Consular Department of the Ministry of Foreign Affairs that operates in Dushanbe International Airport on their arrival (Table 3.1).

#		Types of Passports			Number of Days
		Diplomatic	Service	All types of foreign passport	
1	Countries				
	Afghanistan	✓	-	-	30
2	Armenia, Azerbaijan, Belarus, Georgia, Kazakhstan, Kyrgyzstan, Moldova and Russian Federation				
3	Mongolia			✓	90
4	North Korea	✓	✓		
5	South Korea	✓	✓		90
6	People's Republic of China	✓	✓	✓	30
7	Hungary	✓	✓		90
8	Romania	✓	✓		90
9	India	✓	✓		90
10	Turkmenistan	✓	✓		30
11	Iran	✓	✓		30
12	Ukraine			✓	90
13	Uzbekistan	✓			30
14	Brunei Darussalam	✓	✓		14
15	Pakistan	✓			90

Table 3.1 List of countries, enlisted in the general visa regulations. Source: Ministry of Foreign Affairs, 2016

3.3.2 Tourism Economy in the Republic of Tajikistan

Government of Tajikistan is bringing its tourism legislative acts according to the norms of the UNWTO with the aim to give tourism a new vision. As a result of measures taken by the Government of the Republic of Tajikistan the number of

international tourists to the Republic of Tajikistan is increasing year by year. According to statistical data of Committee of Youth, Sport and Tourism (2016), the expenditures of international tourist arrivals in 2015 nearly doubled at \$206 million, compared to \$106,6 million in 2014 and 91.5 million in 2011. Moreover, the highest number of international tourists arrived to the country was also recorded, in 2015, having reached 413,000. This figure equals to a growth of 94% in comparison to 2014 and 126 % in comparison to 2011 (Figure 3.4).

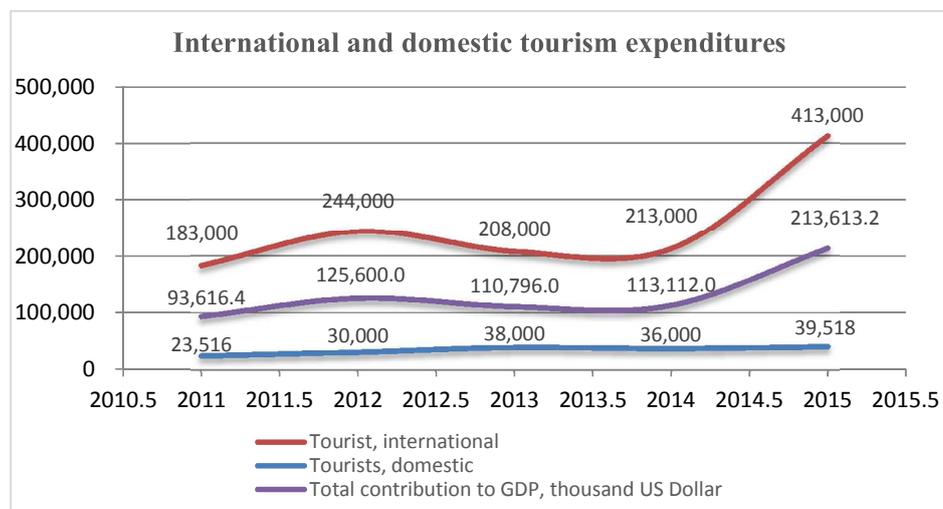


Figure 3. 4 International and domestic tourism expenditures. Source: Committee of Youth, 2016

In 2013 tourism contribution declined, meanwhile GDP grew, thus the share of international arrivals expenditures in GDP decreased 0.4% when

compared to 2012's figure. The share of international arrivals expenditures reached an all-time-high in 2015, rising 2.2 times comparing to 2014 and 1.9 times comparing to 2011 international arrivals expenditures (Figure 3.5)

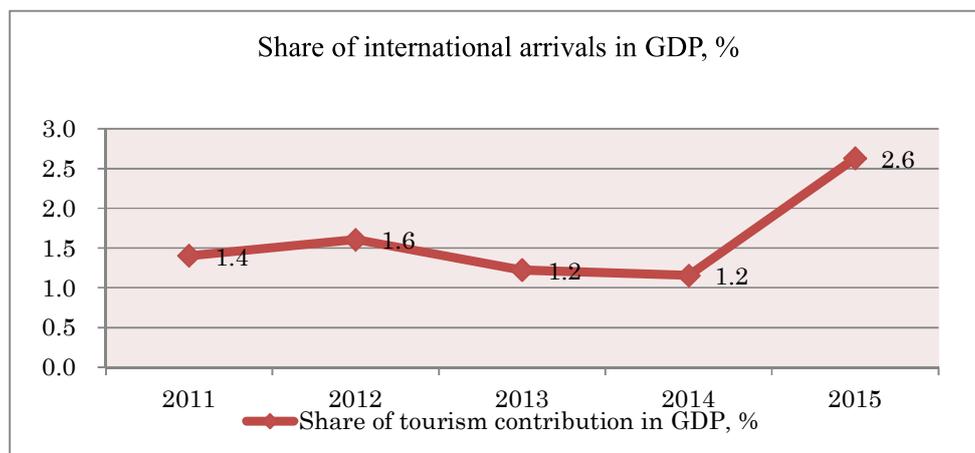


Figure 3. 5 Share of international arrivals in GDP. Source: Committee of Youth Sport and Tourism, 2016

As for GDP, although it did decline between 2012 and 2013, it then bounced back during 2012-2015. However, tourist expenditures dynamics was not stable and fluctuated wildly during this period. As it is seen, in 2013 tourism GDP contribution decreased 14.8 percent in comparison to 2012, but in 2015 it increased sharply by 93.7 percent (Figure 3.6)

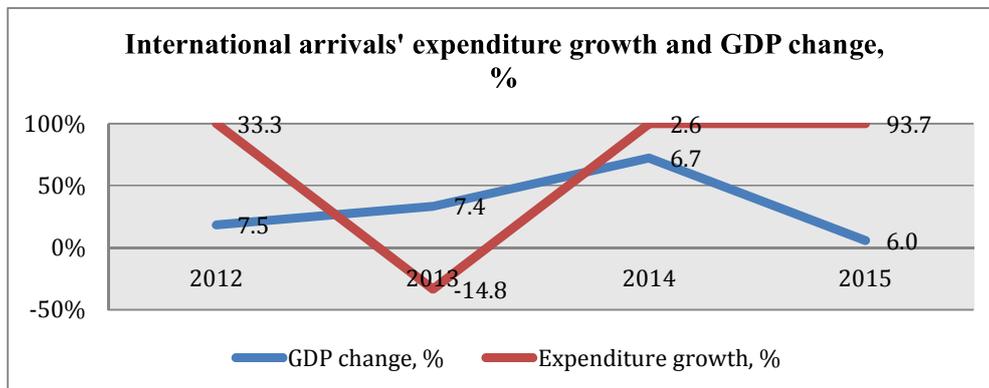


Figure 3. 6 International arrivals` expenditure growth and GDP change. Source: Committee of Youth, Sport and Tourism, 2016

Under effective measures taken by the Government of the Republic of Tajikistan, a large number of events introducing tourism as a new industry of the economy has been organized, both regional and international levels. A total number of 220,559 people attended these events. The events for introducing tourism potential were conducted as exhibitions, meetings and discussions, round-tables, historic and cultural events, trainings and workshops as well as refreshment courses. Simultaneously, advertising materials on tourism and tourist destinations were also administered throughout these events. It should be noted that more than 85 specialists had a chance to take part in tourism related courses abroad (Committee of Youth, Sport and Tourism, 2016).

The Government has also been actively implementing several investment projects supporting tourism infrastructures, which are funded and constructed in

partnership with private entities. The sources of those funds are from the budget are, all highlighted in the State Tourism Development Program.

Construction of new passenger terminal of Dushanbe International Airport was completed in September 2014. The modern Dushanbe International Airport is able to accommodate 500 passengers per hour, and one million passengers per year. Government of the Republic of Tajikistan together with French Government invested €40 million in construction of Dushanbe International Airport's new terminal. This project was a major milestone in terms of tourism infrastructure improvement, as for tourists reaching Tajikistan, a new modern airport is essential because air route remains the most suitable transport.

More than 90 tourist operators are offering tourist services within the country. The number of tourist companies offering services for domestic tourism in 2013 was merely 9, which then increased in both 2014 and 2015, to 12 and 15 respectively. An upward trend was also observed for the number of the travel agencies offering services for inbound tourism, which reached 65 in 2014, and for outbound tourism the figure was 50. Tajik citizens travelled abroad in 2014 totalled 19,479 persons (Figure 3.7).

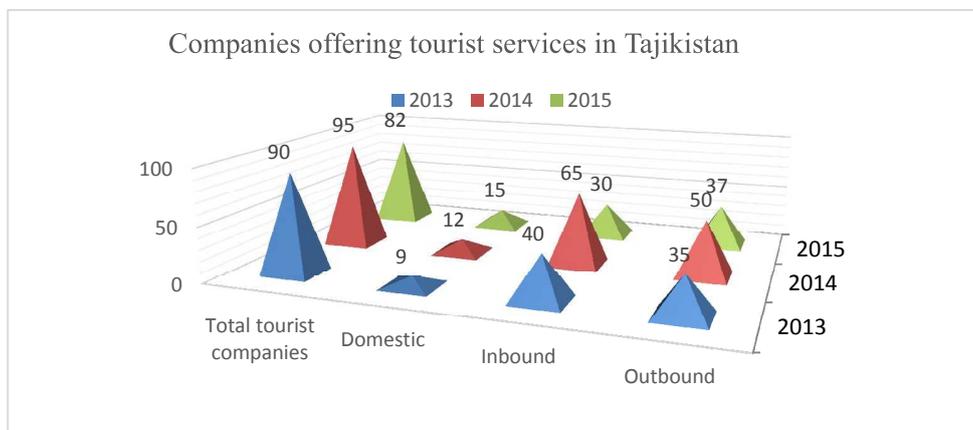


Figure 3. 7 Companies offering tourist services in Tajikistan. Source: Committee of Youth, Sport and Tourism, 2016

The share of the tourists using services provided by the travel agencies was insignificant, as the majority arrived without any package tour. At the same time, it is notable that the service potential of many tourist companies is insufficient.

Dushanbe as a gateway to many tourists is becoming the home of many four and five star hotels- eastern Tajikistan, Dushanbe Serena Hotel, Hyatt Regency Dushanbe Hotel, Sheraton Dushanbe Hotel, Vefa Center, Taj Palace Hotel, Grand Asia Hotel, Vakhsh Hotel, Avesto Hotel and many others. Tourists are often attracted by the availability of familiar international hotel chains, hence it is important to have these kinds of hotels for attracting foreign leisure and business tourists.

The Government of the Republic of Tajikistan is looking for the foreign and local investors who can open three- and four-star global hotel chains, in order to provide more options of lodging, as well as to become a more popular tourism destination. The number of guesthouses typically constructed in national style increased from 158 to 170, and number of functioning resorts escalated from 67 to 73 in 2015.

The increase in inbound tourists could be attributed mainly to one factor, the simplification of visa procedures. Such movement eased the process of attaining Tajik visa, consequently leading to a wider geographical profile for those inbound tourists. In 2015, tourists from 70 countries came to visit Tajikistan (Appendix 2).

Ranked in terms of number of visitors, the top ten are Kyrgyzstan (34.36%), Russia (18.20%), Uzbekistan (27.0%), Iran (0.91%), China (3.38%), Kazakhstan (3.25%), Afghanistan (9.54%), Turkey (0.81%), USA (0.91%) and Germany (0.64%) (Figure 3.8).

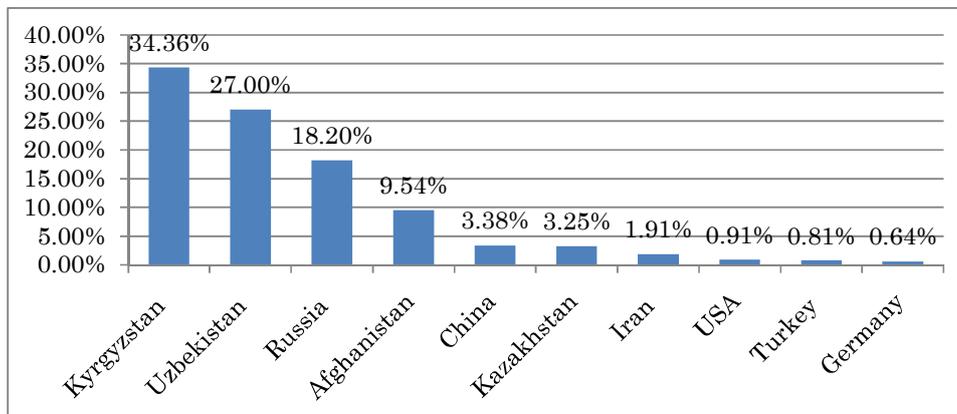


Figure 3. 8 Top ten countries visited Tajikistan on 2015. Source: Committee of Youth, Sport and Tourism, 2016

The number of tourists from neighboring countries accounts for more than three quarters of international tourists. Tourists from Kyrgyzstan, Uzbekistan and Russia dominate on the list of the CIS countries visited Tajikistan (Appendix 2)

3.4 Summary

Republic of Tajikistan has great potential for tourism development and tourist growth. In spite of being landlocked, Tajikistan still has many incentives for a foreign visitor. The Government also took considerable initiatives to simplify the visa application for foreigners to the country, improve safety during their stay in the country, promoting hospitality of the hosts under the tourism logo “Feel the Friendship. These policies were certainly effective considering the positive figures mentioned above. There are still more challenges for the tourism industry, however, which need to be addressed by the Government of Tajikistan.

CHAPTER 4. METHOD OF DATA COLLECTION AND

METHODOLOGY

4.1 Introduction

This Chapter of Study is about purpose of the Study and type of the investigation, data collection and data analysis. Descriptive analysis of the current tourism condition in the Republic of Tajikistan has been conducted. The conceptual framework of the Butler's TALC Model has been tested partially by applying the Multiplicative model of time-series forecast to determine the applicability of model with tourism conditions in the Republic of Tajikistan. A multiplicative model has been employed for the prediction of the tourist numbers and their contribution to GDP of Tajikistan for the 2016-2020 period, on basis of quarterly data of 2011-2015.

4.2 Data collection

For this Study secondary data had been collected from the Ministry of Economic Development and Trade of the Republic of Tajikistan, Ministry of Foreign Affairs of the Republic of Tajikistan, Committee of Youth Sport and Tourism of the Government of the Republic of Tajikistan, Statistic Agency of the Government of the Republic of Tajikistan. For theoretical frameworks and models,

books related to tourism planning and policy, scientific articles, annual reports of UNWTO and WTTC have been used as a data source.

4.3 Methodology

4.3.1 Descriptive analysis of current tourism

The purpose of this Study is to find out the role of public planning and policy in tourism development as well as the contribution of tourism in Tajik economy. The focal point of this Study is to shed lights into the existing tourism development in Tajikistan in order to propose future recommendations for sustainable tourism growth, in which Butler's TALC model will be tested for this purpose. The TALC is widely regarded as a useful descriptive tool to understand how destinations have changed and how decline is likely to occur in absence of appropriate intervention (Howie, 2003). Graphs and figures are illustrated using Microsoft Excel.

4.3.2 Forecasting tools

The purpose of Time-series forecasting is to sort the trend in the available historical data and on the basis of the existing trend, to model future values of any other variables. According to Gunarto (2004), the trend may consist of several elements, that are:

- a. The Trend is the long-term feature that indicates the rise or fall in

available time-series during long time period;

b. The seasonal element is the wave-like fluctuation around the trend with circulating period for one year;

c. The irregularity estimates the time series for existence random or unpredictable factors influencing on the time-series trend. There is a need to take several steps for the estimation of the trend and seasonal elements. The descriptions of these steps are:

1) To use the Additive model or to apply the Multiplicative model. The Additive model considers a Time-series values to be the aggregation of the trend, the seasonal element and irregularity, that is $Y_t = T_t + S_t + I_t$. However, the Multiplicative model considers a Time-series value to be the product of the trend, the seasonal element and the irregularity, that is $Y_t = T_t * S_t * I_t$. The Additive model is applied when the seasonal change level is almost constant. The Multiplicative Model is used when the seasonal variation level depends on the trend magnitude. Usually it is difficult to discern which method is appropriate for calculations. But exploiting Microsoft Excel and Stata 12.1 software may analyze both methods.

2) To use the moving average method in order to smooth seasonal fluctuations, in other words, to take out seasonality and irregularity. The moving

average technique employs average values of the n seasons.

- 3) The location of the moving average values is not straightforward.

When there is an even number of seasons a researcher has to compute the centered moving averages (the baseline).

- 4) To isolate seasonal and irregular elements. For this purpose, in the multiplicative model a researcher divides the available actual data by the centered moving average. The isolation of the seasonal component indicates the difference between existences of the seasonal factor with non-existence.

- 5) To compute the average of previously isolated components for each season to obtain the seasonal index. Utilizing the average helps to get rid of the irregular component within each seasonal element. After calculation the seasonal index should be distributed among all available seasons by their appropriateness.

- 6) To make the final de-seasonalization of the data, that is removing the seasonal and irregular components. For this purpose, the actual data is divided by appropriate seasonal index.

- 7) To run a simple linear regression for identification y -intercept and β (slope). Here the dependent variable (y) is the de-seasonalization value, while the independent variable (x) is t (time-code variable that is all available periods).

8) To identify the trend component on basis of the obtained linear regression. Referring to Gunarto (2004), the mathematic formula is: $y=b\theta+ \beta x$. Here: $b\theta$ is y -intercept value, while β is the regression slope and x -the independent variable's value.

9) To make prediction by using formula: $Y_t=T_t*S_t*I_t$. It means to multiply the trend component (step 8) by the seasonal index (step 5).

10) The obtained forecasts (step 9) and seasonal index (step 5) should be drugged down appropriately to each testing periods in future to make forecast for future values.

In this research, the above steps have been carried out using MS Excel and Stata 12.1 software in order to estimate figures for tourist numbers and their contribution to GDP.

4.4 Results

The Multiplicative Model of Time-series Forecasting has been applied for prediction tourist numbers and their contribution to GDP of Tajikistan for the 2016-2020 periods on basis of quarterly data for 2011-2015. As mentioned before the Government of Tajikistan has set ambitious goals for international tourist arrivals by 2020, in hopes of more significant contribution to GDP growth.

The results of the Multiplicative Model of Time-series Forecasting applied for defining tourists' number for 2016-2020 periods on basis of quarterly trend data for 2011-2015 (Appendix 8) demonstrates the following:

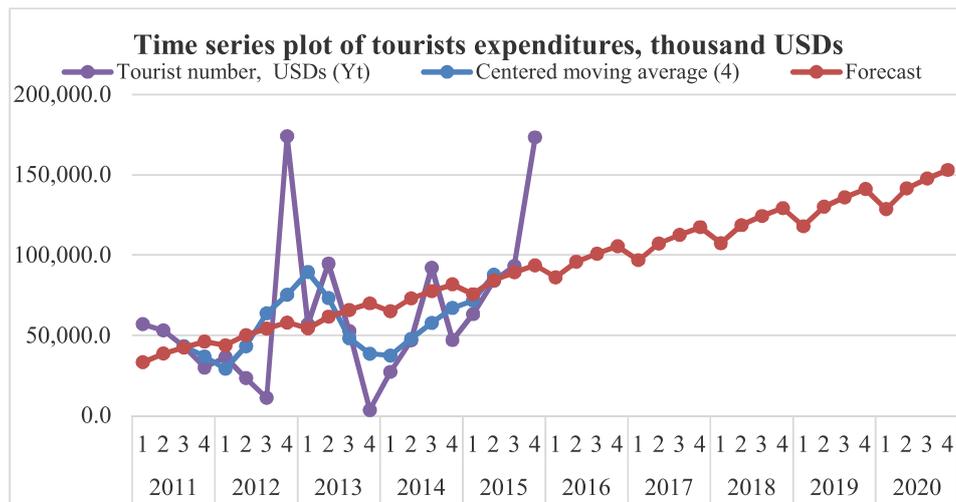


Figure 4. 1. Time series plot forecast

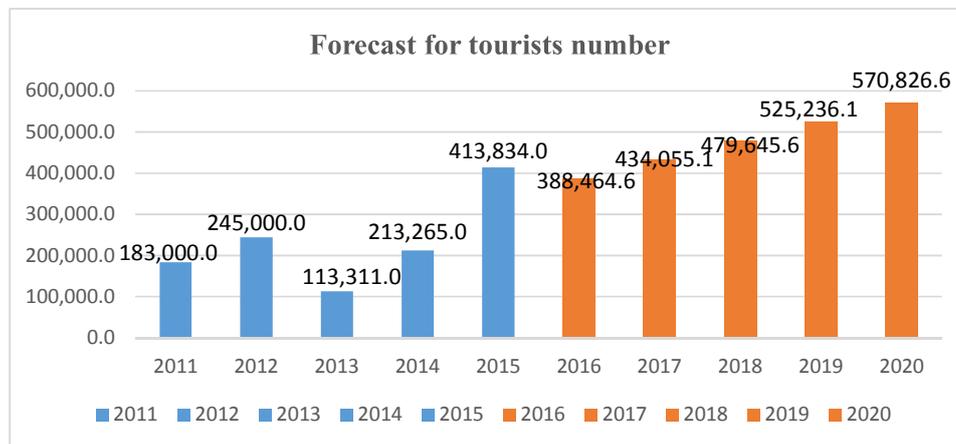


Figure 4. 2. Forecast for tourist numbers 2016-2020

As it is seen from the diagram, starting from 2016, the average annual

growth is expected to reach 7% and by the end of 2020 total amount of tourists would increase approximately by 38% comparing to 2015.

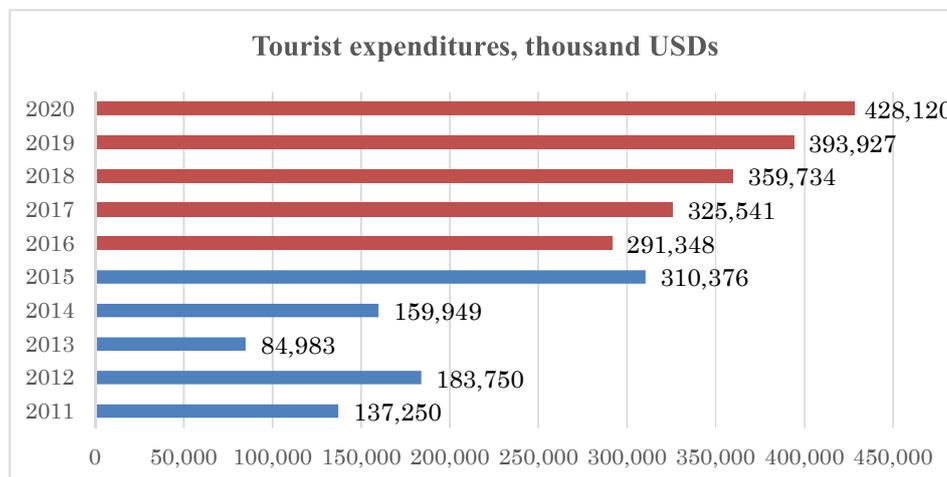


Figure 4. 3. Forecast for tourists expenditures for 2016-2020

According to calculations of WEF, the average spending per international tourist in the Republic of Tajikistan is \$750. If we multiple the number of international tourists to 750\$, tourist contributions to GDP in 2020 will experience a sharp rise, from 310.4 million dollars in 2015 to 428.1 million dollars.

Here, moving average method is used in order to smooth out seasonal fluctuation. The prediction method of choice is irrelevant as any forecasts are subject to uncertainty. Therefore, the objective of a researcher should not be to obtain precise predictions, but rather to obtain as accurate predictions as possible.

CHAPTER 5. DISCUSSION of FINDINGS

5.1 Introduction

Concrete actions have been taken in the Republic of Tajikistan by the Government to develop tourism industry. In particular, several international tourism areas have been established, hotels and trading centers meeting modern requirements have been constructed and steps have been taken to ease access to these places.

As a result of these measures, the number of foreign tourists to the Republic of Tajikistan is increasing year by year. However, despite this fact, national tourism resources are not being used to their best potential in compliance with international tourism standards, and better conditions need to be arranged to today's tourists. For this purpose, Working Group on Improvement of Investment Climate in Tourism Sector of the Republic of Tajikistan has been established.

The Working Group's objective is to identify the main priorities for conducting reforms aimed at creating favorable conditions in the tourism sector through coordination with public-private sectors and development partners.

The Working Group, with assistance from development partners, has conducted comprehensive analyses in airports, land border and customer service

training, visa and registration; licensing and permits, information and statistics, and other aspects of tourism sector. They suggest establishing a national website featuring comprehensive and continually updated information about Tajikistan, which has links to every qualifying tourism business. Another proposal of the Working Group's report is contribution by state authorized agencies in tourism sector, Chamber of commerce and Industry of Tajikistan and Tajikistan Embassies abroad for national tourist businesses to participate in tourist exhibitions abroad and to further cooperate with foreign tourism businesses.

Currently, Tajikistan's share in the worldwide tourism industry on export equivalent terms is insignificant, making up a total of 0,032% or 32,000 people. In import equivalent terms it makes up 0, 24% or over 244,000 people. The Government of the Republic of Tajikistan is therefore paying particular attention to tourism development and is utilizing its ancient historical sites, high mountain peaks and unique nature to attract more tourists¹.

The legal framework for tourism development has been strengthened nationally and a number of normative legal documents, including the Law of the Republic of Tajikistan "On Tourism", "State Tourism Development Program in the

¹ Committee of Youth, Sport and Tourism under the Government of the RT, 2013

Republic of Tajikistan for 2010-2014”, “Tourism Development Concept in the Republic of Tajikistan for 2009-2019” and other development programs have been enacted for this area and smoothly implemented. In addition, tourism cooperation agreements have been signed with a number of countries and the Republic of Tajikistan has been accepted to become a member of several international tourism organizations. More importantly, cooperation has progressed significantly with these organizations.

During the transition period, Tajikistan inherited a weakly developed tourism marketing system which failed to meet the requirements of a market economy. Alongside existing factors supporting to tourism development, a series of obstacles were found in most regions of the country that hindered growth. Addressing these challenges and improving the investment climate in the tourism sector will give a powerful boost to the country’s economy, while also improving people’s well-being, which is one of the strategic goals of the national Government. At the same time, in line with global experience for resolving such challenges in the tourism sector, the Government of the Republic of Tajikistan has identified its initial priorities to attract investment into the tourism industry and to grant incentives for its development. The Government intends to encourage the private

sector and to provide the necessary economic and legal framework for the promotion of tourism destinations. In time, say 3 to 5 years, this will turn into a very important source of foreign currency inflow.

Tourism development in Turkey started from applying this method. Prior to 1985, today's famous tourism destination in this country – Antalia Province - was a devastated and backward corner. There was not even a railway line in the province. After the declaration of the province as a free economic zone and tourism development area – capitalizing on the attractive natural environment and fascinating seaside landscape - domestic financing and foreign investments, particularly from Germany, commenced. As a result, the construction of a number of spacious hotels, contemporary restaurants, state-of-the-art entertainment centers and other tourism infrastructure soon started. In due course, foreign tourism gradually extended to other areas with fascinating scenery and nature and to the cities, including Izmir, Istanbul and Ankara (WG, 2013).

In order to market its tourism products effectively, the Republic of Tajikistan could use the experience of Turkish Antalia and Kyrgyz IssykKul in selecting its tourism “visiting card”. According to The Working Group, despite having not reached its full potential, the tourism industry in Kyrgyzstan is still

famous for its most modern facilities and services, provided in IssyKul. This region is often referred to as the ‘visiting card’ of the country. The tourism plan of Kyrgyzstan mainly focuses on development in Issyk-Kul, which has proven to be very successful (WG, 2013).

Whilst Tajikistan has great natural advantages, success in developing the industry here will require more than opening up to the world and getting the basics right. The World Economic Forum publishes a Travel and Tourism Competitiveness Report measuring countries’ relative performance across several criteria in relation to travel and tourism. In 2013, Tajikistan was ranked 114 out of 140 countries (WG, 2013).

As tourism is relatively undeveloped in the Republic of Tajikistan, it is not surprising that the country is not ranked well on a global scale. However, the country has great potential to develop a significant tourism industry. The established Working Group on Improvement of Investment Climate in Tourism Sector of the Republic of Tajikistan proposed a Model of tourism development in the Republic of Tajikistan.

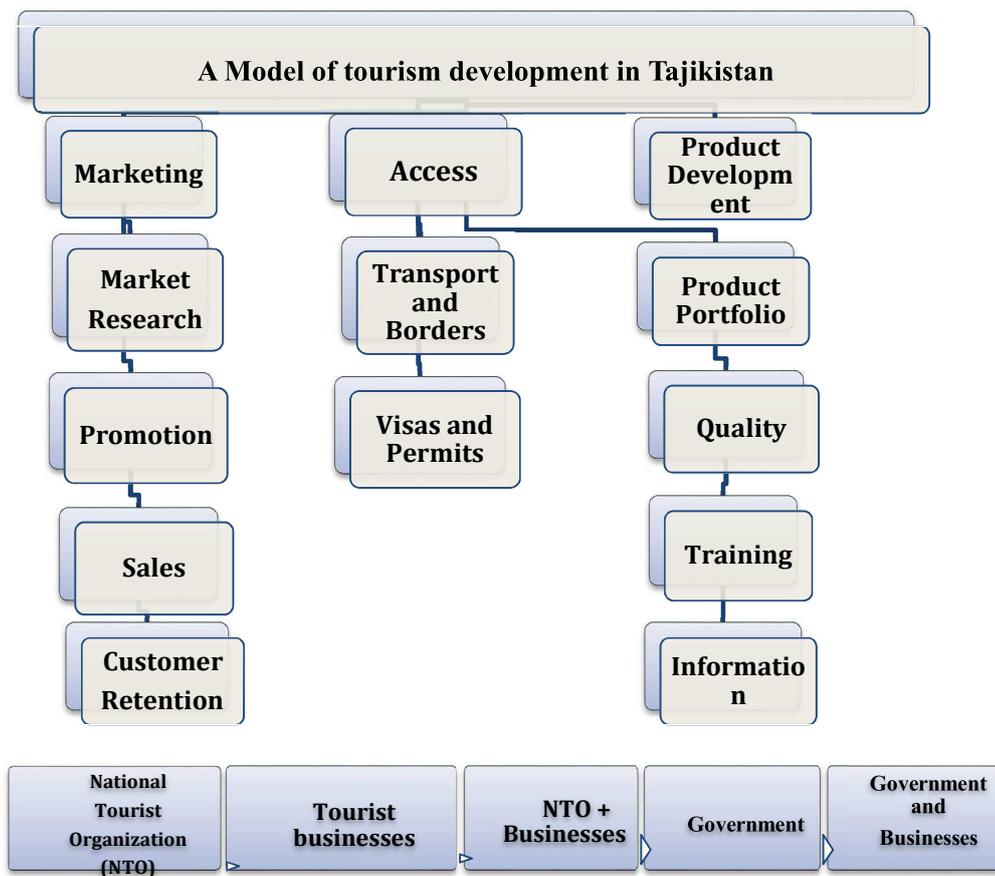


Figure 5. 1. Model of Tourism Development in Tajikistan. Source: Working Group (2013)

The developers of Model of tourism development in Tajikistan insist that the rational implementation “Model for Tourism Development in Tajikistan” will increase the direct effects up to 5% and the indirect effects up to 15% of GDP by 2020 year (WG, 2013).

5.2 Discussion of the findings

Using the Butler’s TALC Model, it is clear that the tourism industry in Tajikistan has shifted from exploration to involvement stage, but for reaching

sustainable growth and to reach next stage - development, the national Government should focus on continuing its regular policy on planning, investment, marketing and access to the country. In fact, Butler (1980) claimed that rational government policy plays a pivotal role in moving the industry from one to another stage of TALC evolution.

The first question “*What is the role of the Government of the Republic of Tajikistan on public planning and policy on tourism?*” – the hypothesis for this question means that the rational public planning and policy for tourism development is important for tourism development, sustainable tourism growth and long term tourism benefits. The lifecycle model proposed by Butler involves the six stages of tourism evolution. These six stages are exploration, involvement, development, consolidation, stagnation and post stagnation. All the six stages with different period of development have changed situation. The concept of a tourist area life cycle explains that “not all areas experience the stages of cycle as clearly as others” Butler (1980). During the first stage of TALC Model, exploration – no travelling pattern could be seen throughout the years and the economic and social life in this stage remains somewhat unaffected by tourism. To test another stage of the TALC Model – involvement, we see that the Republic of Tajikistan started

providing facilities for tourists. The legal framework for tourism development has been strengthened nationally and a number of normative legal documents, including the Law of the Republic of Tajikistan “On Tourism”, “State Tourism Development Program in the Republic of Tajikistan for 2010-2014”, “Tourism Development Concept in the Republic of Tajikistan for 2009-2019” and other development programs have been adopted for this area and smoothly implemented. In addition, tourism cooperation agreements have been signed with a number of countries and the Republic of Tajikistan has been accepted as a member of several international tourism organizations and cooperation has progressed with these organizations.

Accordingly, an identifiable tourist season started to emerge (trend of 2014-2015 years). Advertisings are undertaken to stimulate the demand in specific tourist generating regions. In this regard, starting from 2008 representatives of tourist companies from Tajikistan participated in the international tourism events conducted in Berlin, London, Tokyo, Tashkent and Russia “working on increasing the quality of marketing and informational materials, directed at attracting international tourists to Tajikistan” (Committee of Youth, 2016). The standards and legislation for international cooperation in the tourism development with foreign

countries is currently being expanded.

Globe Spots included Tajikistan in the list of top ten destinations to visit, placing it the second country in the mentioned list, just behind Malta but ahead of Romania, Sierra Leone, Indonesia, Lithuania and five others Globe Spots (2014); the legend of Fan Mountains is widely narrated by travelers Alexander(2016), and as a “*best trekking destination you've never heard of* ” Eden (2016). The role of embassies and representatives of the Government of Tajikistan abroad is significant on advertising tourism.

The next stage of TALC Model is – development stage. In this stage, the provided facilities and improved particular services attract tourists from the generating regions. In case of Tajikistan, these facilitations and improvements expanded the tourist generating destinations to 58 countries in 2015.

It is obvious that tourism in Tajikistan is currently experiencing the beginning stages and may enter the other next stages of TALC Model. The next periods of TALC Model are development, consolidation, *stagnation* and decline stages. Decline is the last of six stages of TALC Model, explaining the decrease of number of visitors, as well their length of stay. In this period, tourists arrive as short breaks or day-trips, and the supply of tourist facilities shrinks. These tourist

facilities may serve as residential homes for elderly or for children, either for housing. However, the literature is evident that if the governments continue rational policy on tourism planning the decline may not occur (Lagiewski, 2006) .

If the tourism industry could create a new image from the adopted state tourism programs, then these programs will lead to a possibly successful tourism industry not only within the country, but also in the region, improving the destination and offer more choices for inbound tourists.

Having said that, the Republic of Tajikistan has great potential for tourism development, which is not being appropriately taken advantage of implementation of some of the proposed recommendations could take a long time, however the actions should be continuous in order to move forward the tourism lifecycle. Only with uninterrupted actions and reforms can policymakers give a major boost to tourism growth.

The second question attempted to find the contribution of tourism as a new industry to the GDP of the Republic of Tajikistan:

What is the contribution of tourism into the national economy of Tajikistan? - The five years' data from 2011 to 2015, the enactment of the Tourism State Development Program, as well Law of the Republic of Tajikistan "On

Tourism”, the Resolution of the Government of the Republic of Tajikistan on “Simplification visa procedures” and the Concept of Tourism Development in the Republic of Tajikistan for the period of 2009-2014” were overviewed to analyze the impact of tourism to GDP. As it is seen, the expenditures of international tourist arrivals in 2015 nearly doubled at \$206 million, compared to \$106,6 million in 2014 and 91.5 million in 2011. Moreover, the highest number of international tourists arrived to the country was also recorded, in 2015, having reached 413,000. Growth of tourism can prove that tourism as a growing industry may bring substantial benefits to society and economy.

5.3 Overcoming challenges

Nowadays tourism industry is a source for economic sustainability. Tourism generates significant revenue. Much of the revenue is likely to be foreign currencies, and it would strengthen country’s balance of payment. Most of the spending goes directly to income. The tourism industry in Tajikistan usually consists of smaller, local businesses which mean the revenue generated is most likely retained in the local economy; it stays in the country, as opposed to being repatriated to foreign investors or suppliers. Tourism is frequently the cornerstone for areas without other economic advantages, for example mountainous and

remote rural areas, and therefore helps in the regional distribution of wealth and underpins the very survival of many communities. The indirect effects of tourism, for example, in requiring local produce and/or skills, can give a basis for other industries to grow together with of tourism, but independently.

Tourism depends on the natural and built environments and embraces local culture, food and drink, history and heritage. People choose to go on holiday somewhere because they are attracted by the mountains and the lakes or the ancient cities.

The growth in tourism therefore must go hand in hand with action to preserve the natural and built environments and to keep alive indigenous culture, traditions, handicrafts and history. Comprehensive commercial sense meets social and environmental priorities in tourism; it is therefore the best industry to ensure the perfect balance of environmental, social and economic sustainability.

The promotion of the industry and the interest of outsiders help to raise awareness amongst local people about what is good and interesting about their country. This, in turn, can instill a new pride in the country through the recognition of all its greatest attributes and it can also encourage domestic tourism, Tajik citizens travelling more within their native land to learn and appreciate it more. In

many countries domestic tourism far exceeds foreign tourism, like in the case of Japan. This is very good for business and serves to bring greater understanding and knowledge of a country to its citizens and a stronger sense of identity.

Development of the tourism sector therefore plays a pivotal role on the socio-economic development of the country in general. It is not just revenue, although that is significant in itself, but it is also an opportunity for improving other aspects of social life including the creation of new jobs, the promotion of the country's international reputation, the strengthening of a sense of identity and national pride as well as economic and environmental sustainability and the development of international relations particularly in the investment sphere.

Despite all the attractions the country has for international tourist, there are number of challenges hindering stable tourism grows.

Having a strategic plan, no matter how well formulated, is worthless without the means to implement it. This is perhaps the biggest challenge facing Tajikistan. The current activity of the State Committee of Youth Affairs, Sports and Tourism under the Government of the Republic of Tajikistan is focused on three important directions - policy on youth and sport as well as tourism. The tourism sector is very fragmented, and overlaps into a range of other related sectors. As the

current State authority has too many responsibilities it is not able to provide in-time and adequate support for the growth of tourism.

Another challenge keeping tourists away from Tajikistan is limited direct flights to major tourist generating destinations. Lack of the specialists on tourism marketing and management is also one of the main issues that the country is facing currently. The quality of customer service at the airport and at all other border crossings is one of the key factors for tourism development. International airports and land borders are the visitor's first - and last - real experiences of Tajikistan. It is of utmost importance to promote that these visitors' experiences are good. On arrival visitors should feel welcomed and well treated. This sets the tone for the whole stay and helps with the later promotion of Tajikistan in their countries. On departure, visitors must leave with a good impression to reinforce what has hopefully been a great experience in the country. Their reports to friends and relatives are the best promotion Tajikistan can get to encourage more visitors. It is therefore necessary to have high quality services in these places. The most important gateway to Tajikistan is Dushanbe International Airport. When tourists arrive via airports and other borders, they are served by several state authorities, including the Border Forces Main Department of the State Committee of National

Security and the Customs Service under the Government of the Republic of Tajikistan. Although the operational circumstances of these structures have improved in comparison with previous years, there are still some professional shortages. These shortages include: lack of foreign language knowledge (particularly English) by employees of the above mentioned institutions, inappropriate communication with tourists and in several circumstances, rude attitudes with passengers by some employees, making tourists wait for a long time at airport departure, taking luggage back etc. It seems that employees of relevant authorities serving the airport are not engaged in hospitality, but only perform their own essential duties. If we can offer the same Tajik hospitality that we give visitors in our own homes to visitors at the airport, then this would be an important achievement for tourism.

Another factor affecting tourism development is the absence of appropriate procedures for obtaining visas, licenses and permits and for handling the registration of tourists. Countries with a particular interest in growing tourism are focusing increasingly on reducing such barriers, however, imposing slight requirements for entry into the country, simplifying processes and thus making access to the country easier for tourists.

5.4 Summary

The priority directions for tourism development have to be carefully selected in order to achieve the desired outcomes. The proposed priority directions for Tajikistan are trekking, adventure, tough touring and pursuing meetings, incentives, conferences and events. Republic of Tajikistan has natural locations unique in the Central Asian region. In other words, from an economic perspective, the tourism market of Tajikistan will be able to offer products for which competition does not exist. It is only necessary to offer these products with high quality and accessible prices for tourists. Elimination the existing barriers give the good reputation as a tourism destination for the tourists and obviously creates basis for the significance contribution of tourism to the national economy.

CHAPTER 6. CONCLUSION

6.1 Introduction

This study has been conducted to analyze the issues of tourism public planning and policy and impact of tourism in the national economy of the Republic of Tajikistan. The major focus on this Chapter is to present the concluding mark, as well limitations and recommendations and summary of the Study.

6.2 Recommendations

Countries, with well-developed tourism industry usually have a separate national tourism authority that operates across the whole activity related to the development of the sector. Therefore a *separate and independent authority* is required to concentrate attention and efforts on tourism sector and to undertake promotion to significantly increase the role of the industry in the economy.

One of the main issues that increase the number of tourists to the country is visa-free travel procedure. In this regard, the recommendations of UNWTO on the better visa facilitation such as *instituting e-visa program* and establishing regional agreements would be a useful approach for Tajikistan to follow. Such bold step could eliminate artificial barriers to make the country much easier for tourists to visit and strengthen the position of Tajikistan in the region and on the international stage. When these processes are simpler and more accessible, the

numbers of tourists will most likely increase.

Republic of Tajikistan is well placed in the heart of Central Asia to attract tourists not only for trips exclusively to the country but also on trips that will include several countries. For this reason, the Government of the Republic of Tajikistan should discuss the issue of *regional tourism* during its inter-governmental economic and technical Commissions between the Republic of Kyrgyzstan and Republic of Uzbekistan to grant international status to the border crossing points between the three neighbor countries. Solving this problem will promote tourism development both in Tajikistan, Uzbekistan and Kyrgyzstan and will ultimately facilitate an increasing number of tourists traveling through this important route of the Great Silk Road.

Future study may need to be conducted to monitor the process of the TALC Model in Tajikistan's tourism lifecycle.

6.3 Limitation of the Study

The main limitations for this research were lack of accurate data, time and funds. It was difficult to find accurate data for at least ten years' tourism trend in the Republic of Tajikistan. At this stage of the study, only the data from 2011-2015 is analyzed.

6.4 Concluding remarks

Recognizing the importance of tourism for its economy, the Government of Tajikistan is taking measures to increase its' contribution to the economy. In the growing market of tourism, understanding the better way of how public planning and policy may expand the opportunities of tourism in developing countries. Still, the government should continue its policy on simplifying the procedures for tourists by implementing the proposed Model of Tourism Development in Tajikistan, particularly in marketing, access and product development with the aim of reaching 5 % of tourism expenditures contribution to GDP. Butler's TALC Model is indicating future paths tourism development in one certain country. The empirical outcomes of Multiplicative Model of Time-Series Forecasting present that the number of tourists would increase stable and their expenditures would increase regularly. The well-adjusted government policy will lead to tourism growth and moving from one to other stage of TALC evolution.

The findings of the study may help tourism planners, and policy makers to importantly recognize to develop competitive market of tourism according to the demand of the tourists.

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APPENDICES

Appendix 1. Silk Roads Sites in Tajikistan. Source: UNESCO, 2010

	Object Name	Country (province, region)	Area (ha)	Geography (width/longitude) or coordination of the center (approximately)
1	Ancient Penjikent	Penjikent town	23	N39°29'13", E67°37'10"
2	Ancient town Bunjikat	Shahristan district	20	N39°54'58.47" E69°0'26.55"
3	Hissar Castle	Hisor district	20	N38°29'01.42" E68°35'37.00"
4	Buddhist monastery Ajina-Tepa	Vakhsh district	1,3	N37°51'51.58" E68°56'30.65"
5	Takhti-Sangin	Kobodiyon district	5	N37°35'23.17" E68°7'12.06"
6	Khoja-Mashad	Shaartuz district	1,5	N37°13'12.64" E68°8'53.12"
7	Ancient Town Khulbuk	Vose district	16	N37°46'39.32" E69°33'24.75"
8	Yamtuch	Ishkashim district	36,5	N36°43'38.59" E71°36'38.90"

Appendix 2. Foreign Citizens Visited Tajikistan on 2015

Source: Committee of Youth, Sport and Tourism, 2016

№	Citizenship	Tourism	Health	Personal	Business	Total
1	China	1227	-	10080	1988	13295
2	Afghanistan	2063	57	34747	606	37473
3	Turkey	960	-	1893	316	3169
4	USA	838	-	1574	1180	3592
5	Germany	879	-	1334	285	2498
6	Iran	3819	-	3430	249	7498
7	Japan	142	-	612	185	939
8	France	435	-	772	121	1328
9	Switzerland	156	-	301	48	505
10	Sweden	87	-	38	77	202
11	India	150	1	1036	457	1644
12	Bosnia	3	-	9	32	44
13	Ireland	38	-	35	53	126
14	England	376	11	1006	200	1593
15	Poland	170	-	129	145	444
16	Australia	193	-	182	149	524
17	Austria	74	1	29	101	205
18	Canada	257	-	403	63	723
19	Denmark	51	-	16	64	131
20	Korea	329	-	402	45	776
21	Nepal	4	-	25	102	131
22	Italy	167	-	396	67	630
23	Pakistan	165	-	439	139	743
24	New Zealand	27	-	4	31	62
25	Singapore	20	-	7	20	47
26	Philippine	19	-	27	77	123
27	UAE	104	-	66	19	189
28	Saudi Arabia	72	-	29	55	156
29	Egypt	17	-	26	31	74
30	Israel	145	-	50	39	234
31	Latvia	47	-	-	105	152

32	Greece	20	-	4	55	79
33	Czech	146	-	16	90	252
34	Netherlands	179	3	31	218	431
35	Gambia	1	-	-	1	2
36	Hungary	21	-	10	72	103
37	Slovenia	19	-	5	47	71
38	Kuwait	16	-	7	42	65
39	Bangladesh	20	-	50	84	154
40	Macedonia	1	-	1	34	36
41	Syria	36	-	86	2	124
42	Finland	48	-	28	107	183
43	Norway	63	-	24	46	133
44	Portugal	7	-	8	54	69
45	Vietnam	11	-	9	31	51
46	Columbia	1	-	4	11	16
47	Belgium	92	-	24	157	273
48	Malaysia	193	-	17	96	306
49	Rumania	30	-	5	55	90
50	Serbia	2	-	13	68	83
51	Latvia	76	-	18	79	173
52	South Africa	10	-	118	456	584
53	Spain	52	-	22	180	254
54	Estonia	38	-	15	44	97
55	Croatia	6	-	4	33	43
56	Indonesia	10	-	22	33	65
57	Iraq	13	-	35	62	110
58	Bulgaria	20	-	19	107	146
	Total	14165	73	59692	9313	83243
	CIS	12130	4	305863	12594	330591
						413834

Appendix 3. CIS Citizens Visited Tajikistan on 2015. Source: Committee of Youth, Sport and Tourism, 2016

№	Citizenship	Tourism	Health	Personal	Business	Total
1	Azerbaijan	45	-	437	158	640
2	Armenia	6	-	128	239	373
3	Belorussia	82	-	459	299	840
4	Georgia	37	-	144	108	289
5	Kazakhstan	532	-	11038	1194	12764
6	Kyrgyzstan	183	-	133966	864	135013
7	Moldavia	89	-	447	73	609
8	Russia	10596	3	51812	9095	71506
9	Turkmenistan	133	-	696	206	1035
10	Uzbekistan	213	-	105764	98	106075
11	Ukraine	214	1	972	260	1447
	Total	12130	4	305863	12594	330591

Appendix 4. The Citizens of Top 10 Countries Visited Tajikistan on 2015. Source: Committee of Youth, Sport and Tourism, 2016

№	Citizenship	Tourism	Health	Personal	Business	Total
1	Kyrgyzstan	183	-	133966	864	135013
2	Uzbekistan	213	-	105764	98	106075
3	Russia	10596	3	51812	9095	71506
4	Afghanistan	2063	57	34747	606	37473
5	China	1227	-	10080	1988	13295
6	Kazakhstan	532	-	11038	1194	12764
7	Iran	3819	-	3430	249	7498
8	USA	838	-	1574	1180	3592
9	Turkey	960	-	1893	316	3169
10	Germany	879	-	1334	285	2498

Appendix 5. Enlisted Countries for Simplified Visa Procedures. Source: MFA RT

Australia	Libya	Poland	Finland
Austria	Bahrain	Portugal	France
Algeria	Belgium	Argentina	Czech Republic
Egypt	Denmark	Korea	Switzerland
Bulgaria	Spain	Indonesia	South Africa
Luxembourg	Morocco	Croatia	Japan
Hungary	Netherlands	Romania	Pakistan
Vietnam	Norway	Singapore	India
Brunei Darussalam	Saudi Arabia	Syria	Yemen
Israel	Sweden	Slovak Republic	Turkmenistan
Greece	Jordan	Slovenia	Venezuela
China	Kuwait	UK	Uzbekistan
Ireland	Latvia	USA	Andorra
Iran	Libya	Thailand	Vatican
Iceland	Lithuania	Turkey	Liechtenstein
Italy	Malaysia	Tunisia	Monaco
Canada	Malta	Brazil	Cuba
Qatar	Mexico	Germany	Chili
Cyprus	New Zealand	Oman	Mongolia
Estonia	UAE	Philippines	Senegal

Appendix 6. Tourism Development Legal Framework. Source: Committee of Youth, Sport and Tourism

1	Law of the Republic of Tajikistan “On Tourism” of September 3, 1999, No. 824;
2	Resolution of the Government of the Republic of Tajikistan of April 2, 2009, No. 202 “On Approval of Tourism Development Concept in the Republic of Tajikistan for 2009-2019”
3	Resolution of Government of the Republic of Tajikistan of May 28, 2009, No. 299 “On Approval of State Tourism Development Program in the Republic of Tajikistan for 2010-2014”
4	Resolution of Government of the Republic of Tajikistan of November 3, 2001, No. 498 “On Declaring Baljuvon District as the International Tourism Area”
5	Resolution of Government of the Republic of Tajikistan of July 3, 2002, No. 276 “On Complex Development Program of Baljuvon District as the International Tourism Area for the Period of 2002-2012”
6	Resolution of Government of the Republic of Tajikistan of July 1, 2010, No. 319 about the report of the Chairman of Baljuvon District of Khatlon Province concerning the process of implementing the Resolution of Government of the Republic of Tajikistan dated 3 July 2002, No. 276 “On Complex Development Program of Baljuvon District as the International Tourism Area for the Period of 2002-2012”
7	Resolution of Government of the Republic of Tajikistan of March 3,

	2011, No. 132 about introducing modifications to the Resolution of Government of the Republic of Tajikistan of July 3, 2002, No. 276 “On Complex Development Program of Baljuvon District as the International Tourism Area for the Period of 2002-2012”
8	Resolution of Government of the Republic of Tajikistan of October 25, 2003, No. 475 “On Establishing Sari Khosor Natural Park” in Baljuvon District of Khatlon Province
9	Resolution of Government of the Republic of Tajikistan of March 3, 2011, No. 125 on establishing the State Institution of “International Rehabilitation Center” in Shahidon Village located in Sari Khosor Village Community of Baljuvon District.
10	Resolution of Government of the Republic of Tajikistan of March 4, 2005, No. 80 “On Issues of State Support for the Development of Environmental Tourism, Mountain Sports and Mountaineering Tourism in the Republic of Tajikistan”

Appendix 7. World Travel and Tourism Contribution – 2015. Source: WTTC, 2016

KEY FACTS:	DIRECT CONTRIBUTION	TOTAL CONTRIBUTION
GDP	The direct contribution of Travel & Tourism to GDP was USD2,364.8bn (3.1% of total GDP) in 2014, and is forecast to rise by 3.7% in 2015, and to rise by 3.9% pa, from 2015-2025, to USD3,593.2bn (3.3% of total GDP) in 2025	The total contribution of Travel & Tourism to GDP was USD7,580.9bn (9.8% of GDP) in 2014, and is forecast to rise by 3.7% in 2015, and to rise by 3.8% pa to USD11,381.9bn (10.5% of GDP) in 2025.
EMPLOYMENT	In 2014 Travel & Tourism directly supported 105,408,000 jobs(3.6%of total employment). This is expected to rise by 2.0% in 2015 and rise by 2.0% to 130,694,000 jobs (3.9% of total employment) in 2025.	In 2014, the total contribution of Travel&Tourism to employment, including jobs indirectly supported by the industry, was 9.4% of total employment (276,845,000jobs).This is expected to rise by 2.6% in 2015 to 283,983,000 jobs and rise by 2.3% pa to 356,911,000 jobs in 2025 (10.7% of total)
VISITOR EXPORTS	Visitor exports generated USD1, 383.8bn (5.7% of total exports) in 2014. This is forecast to grow by 2.8% in 2015, and grow by 4.2% pa, from 2015-2025, to USD2,140.1bn in 2025 (5.6% of total).	
INVESTMENT	Travel & Tourism investment in 2014 was USD814.4bn, or 4.3% of total investment. It should rise by 4.8% in 2015, and rise by 4.6% pa over the next ten years to USD1, 336.4bn in 2025 (4.9% of total).	

Appendix 8. Quarterly Tourism Data. Multiplicative Model of Time-series Forecasting

t	Year	Quarter	Tourist number, USDs (Yt)	Moving average (4)	Centered moving average (4)	Isolation (Yt/CMA)	Seasonal Index	Deseasonalize (Yt/St)	Trend, Tt	Forecast
1	2011	1	57,000.0				0.87	65,239.9	38,018.6	33,216.8
2		2	53,000.0				0.94	56,246.2	41,050.8	38,681.6
3		3	43,000.0	45,750.0	43,187.5	0.996	0.96	44,616.8	44,083.1	42,485.7
4		4	30,000.0	40,625.0	36,937.5	0.812	0.98	30,642.2	47,115.4	46,127.9
5	2012	1	36,500.0	33,250.0	29,250.0	1.248	0.87	41,776.4	50,147.6	43,813.9
6		2	23,500.0	25,250.0	43,250.0	0.543	0.94	24,939.4	53,179.9	50,110.6
7		3	11,000.0	61,250.0	63,826.0	0.172	0.96	11,413.6	56,212.1	54,175.2
8		4	174,000.0	66,402.0	75,289.5	2.311	0.98	177,724.7	59,244.4	58,002.8
9	2013	1	57,108.0	84,177.0	89,393.5	0.639	0.87	65,363.5	62,276.7	54,411.0
10		2	94,600.0	94,610.0	73,293.9	1.291	0.94	100,394.2	65,308.9	61,539.6
11		3	52,732.0	51,977.8	48,240.1	1.093	0.96	54,714.7	68,341.2	65,864.7
12		4	3,471.0	44,502.5	38,527.5	0.090	0.98	3,545.3	71,373.4	69,877.6
13	2014	1	27,207.0	32,552.5	37,483.3	0.726	0.87	31,140.0	74,405.7	65,008.2
14		2	46,800.0	42,414.0	47,865.1	0.978	0.94	49,666.5	77,438.0	72,968.7
15		3	92,178.0	53,316.3	57,830.4	1.594	0.96	95,643.8	80,470.2	77,554.3
16		4	47,080.0	62,344.5	66,987.6	0.703	0.98	48,087.8	83,502.5	81,752.5
17	2015	1	63,320.0	71,630.8	71,771.1	0.882	0.87	72,473.5	86,534.7	75,605.3
18		2	83,945.0	71,911.5	87,685.0	0.957	0.94	89,086.6	89,567.0	84,397.7
19		3	93,301.0	103,458.5			0.96	96,809.0	92,599.3	89,243.8

t	Year	Quarter	Tourist number, USDs (Yt)	Moving average (4)	Centered moving average (4)	Isolation (Yt/CMA)	Seasonal Index	Deseasonalize (Yt/St)	Trend, Tt	Forecast
20		4	173,268.0				0.98	176,977.0	95,631.5	93,627.3
21	2016	1					0.87		98,663.8	86,202.4
22		2					0.94		101,696.0	95,826.7
23		3					0.96		104,728.3	100,933.3
24		4					0.98		107,760.6	105,502.2
25	2017	1					0.87		110,792.8	96,799.5
26		2					0.94		113,825.1	107,255.7
27		3					0.96		116,857.3	112,622.8
28		4					0.98		119,889.6	117,377.0
29	2018	1					0.87		122,921.8	107,396.7
30		2					0.94		125,954.1	118,684.7
31		3					0.96		128,986.4	124,312.4
32		4					0.98		132,018.6	129,251.8
33	2019	1					0.87		135,050.9	117,993.8
34		2					0.94		138,083.1	130,113.7
35		3					0.96		141,115.4	136,001.9
36		4					0.98		144,147.7	141,126.7
37	2020	1					0.87		147,179.9	128590.91
38		2					0.94		150,212.2	141542.76
39		3					0.96		153,244.4	147691.42
40		4					0.98		156,276.7	153001.53

