



STRATEGY CHALLENGE MANAGEMENT REPORT



NATIONAL SILK ROAD ACTION PLAN: ALTAI KRAI (RUSSIAN FEDERATION)

Lausanne, May 2012

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Group 12

Nicolas DANET	567664840	_____
Thomas DE CARVALHO	567893035	_____
Alexane DE TONNAC DE VILLENEUVE	567673177	_____
Sebastian GRAF	444771246	_____
Maxime HECKEL	584134400	_____
Quentin HIGGINS	401518850	_____
Alexandre WU	579211924	_____



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1 Introduction

Dating back from 100 BC, the 12'000 km long Silk Road formed the first link between East and West to enable the exchange of arts, ideas and technology between different cultures. UNWTO's mission is to build a Silk Road tourism offer with "an internationally cooperative network of destinations stimulating investment, employment and responsible destination management". This project focuses on Russia, more specifically the Altai Krai region. The mission is to form a 5-year strategic plan developing tourism in the region in line with values promoted by the "Silk Road program" of the UNWTO.

Altai Krai is a region located in the South-East of West Siberia where health-care resort traditions are quite rich. It is clear that the region's added value lies in its natural offer through its sceneries, its opportunities to do extreme sport or by developing healthy offers through centers such as spas. The region of Altai Krai has a touristic offer for the development of the Silk Road based on health and wellness where people can experience traditional ways of healing.

Altaysky is one of the most developed rural touristic areas in the Altai Krai region. The district, situated in the south-eastern part of the territory, has a similar environment to some of its neighbouring district. It sets itself apart from the others because it is the most diverse, offering attraction during summer and winter for all ages and preferences, and has been selected to implement two special economic zones by the Russian federation (the Sky-Blue Katun and the Siberian Coin). There is also the Biysk airport, situated 100 km away from the region, which serves more interregional destinations. The mission is to promote the Altaysky region as a main destination of the UNWTO Silk Road Project.

2 Forces – Trends

2.1 Investments

The Russian government has setup the "Special Economic Zone" programs to diversify its economy. Tourism will see better infrastructure being put in to place in key destinations. The Altaysky district was selected to implement the Sky-Blue Katun SEZ, a recreation area based on sports and wellness. Furthermore, the government has decided to create a gambling zone "the Siberian Coin" in this same district.

IMPACT

The primary stakeholders who are affected by this are the local community and the government. They will benefit from these major investments in the region that as a result will be accompanied by a refurbishment of the transportation infrastructures as well as extending basic needs such as electricity, gas and water.

2.2 Sports

With an important amount of rivers, mountains ranging from 1'000m high to flat platforms and natural resources, the Altaisky region has the opportunity of offering various sports activities. Currently in Russia the travel retail product sales for adventure/trekking holiday packages demonstrated a demand reflecting economical situations yet maintaining growth (Euromonitor International, 2011).

IMPACT

The trend for sports and the available existing resources means that it is relevant to develop the sports offer.

2.3 Health and wellness

Altaisky district finds its attractiveness in its unique natural environment combined with its use of traditional medicine for the purpose of visitor's well being and health improvement.

Maral-breeding farms use antlers for their pantocrine extract which has been used in many health improving practices and in medication for over 2,000 years and is believed to be a cure for over 52 diseases, help restore muscular force, give energy, help blood circulation and heal wounds. (Altai region, 2012) (Nutra News, 2008).

IMPACT

This development will have a noticeable impact on the local community. Knowledge on traditional healing methods will be shared and passed on. Locals will work in maral-breeding farms to extract the pantocrine and in health centers to help treat patients. They will learn English or another foreign language and unemployment rate and poverty will also decrease. Medical and Health improving tourism will continue developing and will participate in the diversification of the Russian economy. The use of the alternative medicine will help give an international exposure to this region of Western Siberia and could trigger pharmaceutical companies to do more research on pantocrine and to open offices locally.

2.4 Tourism demand

2.4.1 Domestic

The Altai territory registered 498,000 trips the same year and position it self as the 14th top destination in Russia. Moscow, Krasnodar territory, Karelia republic and St Petersburg are the top four destinations. Domestic leisure tourism is orientated to health and wellness (46%), historic location (40%), seaside and sports (Euromonitor International, 2011). Since the Altai territory is famous for its nature, its health and wellness and history, there is a great opportunity with the domestic market (Euromonitor International, 2011).

2.4.2 Inbound

The three nationalities that most visited Russia in the past 5 years were Ukraine, Kazakhstan and Azerbaijan. 80% of inbound tourism is for leisure, mostly to visit friends and relatives, and only 9% represent the real leisure tourism. China is the first non ex-soviet republic country to visit Russia and generally go to Moscow, St. Petersburg and neighbouring regions.

Visitors tend to travel in organized groups (25%), in families (22%) and in couples (12.8%) (Euromonitor International, 2011).

IMPACT

This situation presents a big opportunity for the Altai region since Kazakhstan and China are directly bordering and that the region offers many activities for families.

Information about the Value Drivers please refer to Appendix 7.1

3 Strategy

3.1 The problem

The Altaisky region suffers from poor promotion and lack of information, poor quality of service caused by an absence of professional staff, a poor travel and tourism infrastructure, and a lack of control (Euromonitor, 2009). These issues, however, can be addressed through the suggested plan below.

3.2 Solution

Create and communicate the unique identity of the Altaisky region as the number one destination on the Silk Road for health and wellness.

3.3 Action plan

To best develop the strategy, an official UNWTO Tourism Office will be established in two locations: the Sky-blue Katun and the Siberian Coin gambling zone. It will be in direct contact with all hotels, sports and wellness infrastructure and tour guides in the region. These offices will be in charge of creating and maintaining the website, developing readymade packages, ensuring coherence with Silk Road values including sustainable tourism and decreasing poverty, and maintaining contact with neighbouring UNWTO Tourism Offices and travel agencies.

Furthermore, local tour operators who demonstrate sustainable practices will be given a “UNWTO Certified” label. This will ensure that the core values of the UNWTO Silk Road project and Millennium Development Goals will be respected and effectively implemented throughout the region. By having these partnerships, the Silk Road Project can maintain control of working conditions, devote a percentage of proceeds to local communities and heritage sites which go in line with the MDG, and promote sustainable tourism.

3.4 Concept

3.4.1 Who is targeted?

Domestic tourists whose purpose of visit is for health and wellness will benefit from these offices. However, with the developing infrastructure, international tourists should not be neglected in the near future. This includes many diverse types of customer segments: sport enthusiasts, health and wellness seekers, and families (The Official Site of the Altai territory).

3.4.2 Distribution Channels

To address the issue of lack of information, we will create a simple and informative website communicating what the region has to offer. Tourists can also collect information about the region at the physical UNWTO Tourism Offices.

3.4.3 What will be offered?

In association with existing tour operators who bear the new “UNWTO Certified” label, ready-made packages will be created. They will be oriented towards health benefits, which may include outdoor sporting activities. There will also be the possibility for tourists to adapt their journey according to their schedule. All packages will be created in line with the established Silk Road program for sustainable tourism.

3.4.4 How can tourists come?

Access to Altai Krai is most likely going to be by air transport. The Tourism Office will also provide information on how to get to more remote locations in the region such as by car, organized private minivans or by regular bus. Access by train is also available due to the trans-Siberian line.

3.5 Investment

The investors for this project are the UNWTO and the Russian government. With the goal of increasing foreign tourists from 2 million to 15 million, the State is increasing their advertising budget to \$10.1 billion (Meetin + Incentives Travel, 2010). Furthermore, to improve the tourism infrastructure, the Russian government has implemented the SEZ program, Altai Krai being one of the top priorities.

3.6 5-year plan

The first two offices will be established in the Sky-blue Katun and the Siberian coin. As the infrastructure becomes more developed and the renovations of the airports are completed, UNWTO Tourism offices will be established in the Barnaul, Biysk, and Gorno-Altaysk airports. After these 5 offices have been established, UNWTO should begin approaching local tour operators to “certify” sustainable operations. Subsequently, the Belokurikha area should host an Official UNWTO Tourism office to further promote health and wellness. The next area that should be exploited in the Altai Krai is the Slavgorodskiy district due to its high popularity in recent years for medicinal benefits (THE VOICE OF RUSSIA, 2011).

Information about the Balance Scorecard please refer to Appendix 7.2

4 Risk

4.1 Cultural aspects

Altai Krai’s overall history represents some of the earliest forms of mankind and the region was home to nomadic tribes. During the 19th century, the region was a major producer of

silver for Russia and after the crisis hit, towards the end of the 19th Century, its major economic situation revolved around agriculture (The Altai territory Administration Apparatus). Despite the Silk Road passing by Mongolia, Kazakhstan and sometimes the Altai mountains (found in the Altai republic), Altai Krai never knowingly welcomed the Silk Road. As such, being in the Silk Road program, does not position the region as competitively as other members of the program. This historical fact may act as a risk towards the development of the project, which bases its offer on health & wellness mainly through sports, and is countered by ensuring coherence in the touristic offer. This is achieved by implementing values of the Silk Road program, such as the creation of sustainable tourism, into the touristic offer and positioning Altai Krai as a complementary region on the Silk Road program.

4.2 A complex bureaucracy

The very bureaucratic structure of the Russian government as well as its complex territorial organization can deter development in the Altai Krai UNWTO tourism development program. (European Union Institute for Security Studies, 2012)

In fact, developing ambitious projects as the UNWTO's mission for an entire region that grouped 11 districts and 60 municipalities is very difficult (The Official Site of the Altai territory). There are a lot of different decisional actors to convince.

However, thanks to Altai's government many improvements have been made in terms of state support for business, infrastructure development, and economic position of the region inside Russia and abroad, as well as law enforcement (The Official Site of the Altai territory, 2012). Those efforts could significantly speed up the regional tourism development. However, it is essential that the government continues to invest in the Altai Krai, otherwise most of those decisions could still be at a project level and it could represent an important risk in the success of developing Altai Krai as a Silk Road and main domestic touristic destination.

4.3 Monetary

One of the risks, as for most projects, is the return on investment, which could be very slow if the demand is lower than expected due to possible external reasons¹.

Information about the how to reduce these risks please look at Appendix 7.3

¹ The region and the way it was promoted are not attractive for tourists. Moreover, the world's economic situation lowers tourism demand.

5 Benefits

5.1 The UN

Our Tourism Offices will gather data on tourists coming into the region, allowing the UNWTO to adapt its promotion and offer.

The Golden Mountains located in the Altai Republic are classified under the UNESCO World Heritage Site and attract many tourists every year. Since the Altaisky district is bordering the republic, and will become a major destination through its investment program, as well as having better accommodation infrastructure it will play an important role as a the starting point for excursions to the republic.

5.2 Sustainable

The Altaisky region is famous for its unique combination of various landscape and maral-breeding for antlers and its products health treatments. Hence, the SEZ Sky-Blue Katun has been created to benefit from these and develop tourism dedicated to it, such as adventures in natural surroundings, extreme sports, health and wellness. The construction of the complex has a «well-planned arrangement of functional zones and their elements is under consideration», and is entirely made of natural building materials (Shchetinin, 2010). As a matter of fact, all the promoted activities in Altaisky are made possible with and in respect of its natural landscape – without the creation any activities that are not in consistence with its environment (The Official Site of the Altai territory, 2012). The implementation of a tourist office specialized in promoting health and wellness in the Altaisky will therefore contribute in developing the on-going Sky Blue-Katun Project, promoting sustainable, ecological and responsible touristic activities. Sustainable tourism promoted by a unique tourist office will allow to have a positive economic, social and cultural effect and benefit the local population and for its future generations.

5.3 Stakeholders

From the matrix found in Appendix 7.4 the two most important stakeholders have been identified: tour operators (TO) and local communities. TO will benefit from more business opportunities and demand. As an officially “UNWTO Certified” tour operator, the company’s image will be enhanced and working conditions will be improved. The increase in demand will help local communities create new job opportunities in all sectors linked to tourism. The UNWTO was also identified as a key player since they are the developers of the Silk Road project and the link to other participating countries. The UNWTO is expected to act as fair as possible by exercising their power on ensuring proper sustainable behaviour. The

regional government of Altai Krai was identified as another key stakeholder due to its financial support and will benefit from job creation and infrastructure upgrades.

5.4 Increased accessibility

The concept will improve the availability of information on activities and accommodation in the region. Lack of information will no longer be an issue as details on hotels, sports infrastructure, health and wellness activities, and readymade packages will be readily available from one, easily accessible platform. This will in turn increase revenue and demand since tourists can conveniently learn about all the opportunities Altai Krai has to offer in terms of health and wellness (sports included).

5.5 Control

Since the business environment in Russia is rife with corruption, an office streamlining all the tour operators in the area will give an opportunity to the UNWTO to effectively manage sustainable tourism. This will also protect tourists from the bankruptcy of individual tour operators.

6 Conclusion

Altai Krai is in a unique position as Russia is focusing on developing its tourism industry. The UNWTO should take advantage of the investments being made into the region's infrastructure by developing official UNWTO Tourism Offices in key locations. These offices and Altai Krai's natural resources will successfully position the region as the number one destination for health and wellness on the Silk Road. Finally, the UNWTO can implement this strategy in other main destinations along the Silk Road.



7 Appendix

7.1 Value drivers

7.1.1 Investment

Value Drivers	Today	Changes in next 5 years
Siberian Coin	<ul style="list-style-type: none"> • Project development period 2008-2020 • Under construction • Economical boost for the region. • Project Budget: 760 million euros 	<ul style="list-style-type: none"> • Increase in quality accommodation infrastructure (3000 rooms 3* to 5* hotels) • Setting up activities infrastructure (ex: paragliding and gliding centre) • Up grading the transport infrastructure <ul style="list-style-type: none"> ▪ Reconstruction of the Biysk and Gorno-Altai airports ▪ Reconstruction and extension of territorial roads ▪ Setting up of bridges across the Katun • Extending the gas supply • Bringing energy to the region
Sky Blue Katun	<ul style="list-style-type: none"> • First extreme sport SEZ in Russia • Developed (2007-2027) under public & private partnership • Project budget: 790 million euros • 12 tourism amenities operating • 1 million visitor in the last 3 years • 460 jobs provided • Joint expenses with Siberian Coin, accelerating the creation of outer infrastructure • Economical boost for the region 	<ul style="list-style-type: none"> • 3500 rooms • 15 hotel complexes/ camp sites/ caravans • Food centers • 6 extra tourism amenities • Project value: 30.0 billion rubles • Implementation period: 2007 – 2027 • 3,326 hectares zone • Aggregate annual revenue volume forecast: 3 billion rubles / year • 100% tax exemption (real estate & land tax) during the 5 first years for any entrepreneurial business • 4.5% tax exemption: 15.5% instead of 20%
Transport infrastructure	<ul style="list-style-type: none"> • Poor 	<ul style="list-style-type: none"> • New highways, more modern airports, better railings and naval systems

7.1.2 Sports

Value Drivers	Today	Changes in 5 years
Environmental	<p>In the summer, when high temperature rises to 26-28°C, this means that the environment permits for sports such as paragliding, horseback riding, trekking and even carting. Rivers also allow for the practice of rafting, canoeing or kayaking. In the winter, conditions may be difficult harder to practice (and attract) sports as temperature can fall to -50-55°C. However, in between those extreme conditions, snow is present</p>	

	allowing for winter sports such as alpine skiing (to reference: Siberian coin ppt)	
Willingness to travel for sports	Shown as growth of .05 in value between 2005 and 2010, where the peak demand showed a growth of 1.2 value in 2007 against 2005.	The demand represented 9.6 in value in 2009 and is expected to grow to 11.6 by 2015 (Euromonitor International, 2011). With an increasing purchasing power Invalid source specified. , customers have an increasing opportunity to demand more by spending more and therefore the expected increasing forecast of Euromonitor for sports seems accurate.

7.1.3 Health Wellness

Value Drivers	Today	5 year future
Infrastructure and natural environment	A majority of hotels offer wellness services such as Spas, Turkish baths, and swimming pools. There are also a number of health clinics treating patients with alternative methods, using vegetal and animal extracts. The unique natural environment combining lakes mountains and forests and offering outdoor activities participates to the well being of visitors.	New hotels will be opening with bigger and better wellness infrastructure and international hotel brands will appear in Altai Krai. New medical and research centers will appear and pharmaceutical companies might invest in the region to continue researching and developing pantocrine. Unless there is a major natural hazard, the environment will be the same and will offer more
Traditional medicine	A part of tourists in Altai Krai come for medical reasons. Traditional medicine uses a unique extract from Maral's antlers, Pantocrine, which is famous for its invigorating and healing properties. Traditional methods use pantocrine and other vegetal or animal extracts to cure an unlimited number of diseases or as a beneficial cure for sportsmen and other patients.	Altai Krai will capitalize on its use of traditional natural medicine and the main reason for visiting Altai Krai will be Health improvement tourism. This will not only attract sick patients but also athletes, families, the elderly and the wealthy. Many new sanitariums will open for the different type of treatments. These will be divided in two categories: the treatment of diseases and depression on one side and the health and performance improvement on the other.

7.1.4 Inbound tourism

Value Drivers	Today	Changes in next 5 years
Domestic tourism	Struggling due to recession Russian middle class went from 8 million to 55 million (2000-2006)	About 10% increase Will increase due to federation high investment in special economic zone for tourism "Sky Blue Katun" Increase within the middle class

Inbound tourism	Neighboring countries Visiting friends and family Travel in organized groups Struggling due to recession Visa slowing the inbound tourism	Average 20% increase by 2015 New visa agreements with certain countries.
Trends	Health and Wellness Historic location Seaside Extreme & sport tourism Poor accommodation infrastructure and high room rates	Better quality in infrastructure

7.2 Balance scorecard

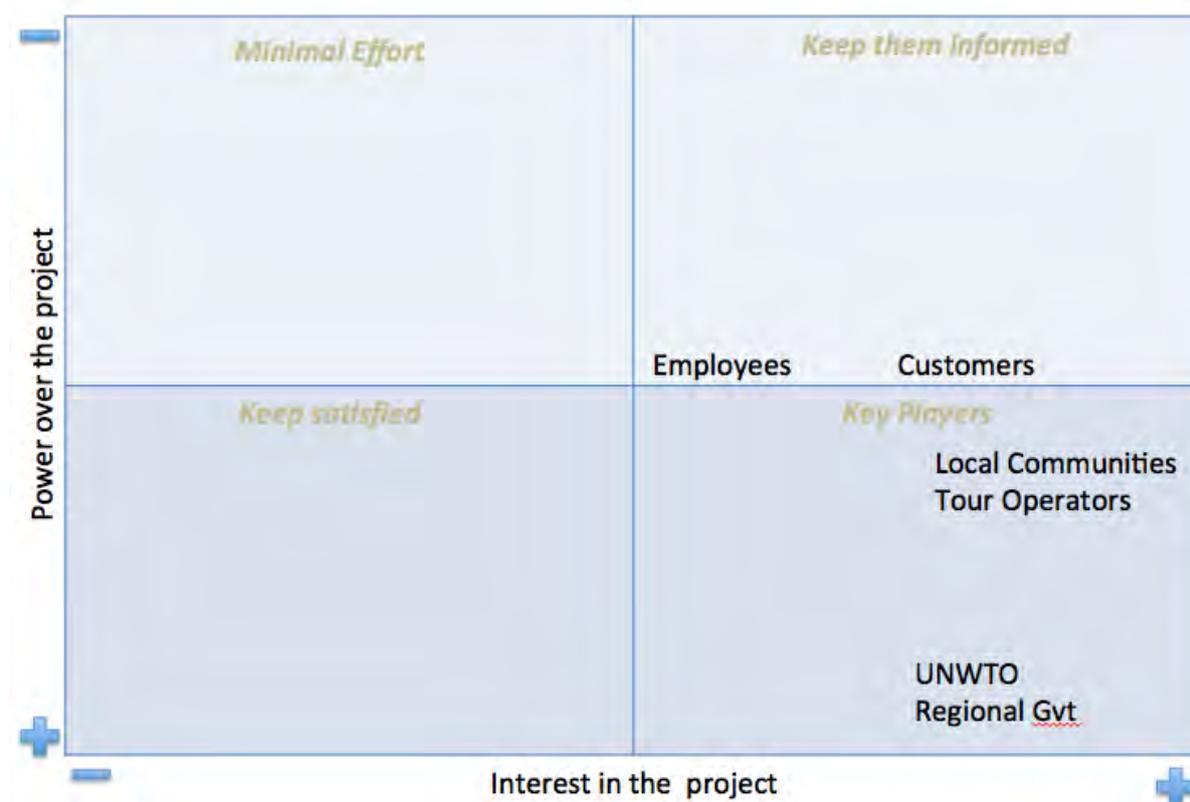
Strategic Priorities	Objectives	Measures	Initiatives
Finance	Low operating expenses	1) Touristic Office low in rent 2) Employee salary/wage 3) IT maintenance of website and database	1) Find skilled labour 2) Low rent facility
	Find investment with the Russian government in the Travel and Tourism budget	1) Number of inbound tourists 2) Return on investment 3) Market growth	
Customer	Database of our inbound tourists, tour operators in the region and infrastructure in the region	1) Number of contacts on database 2) How much information collected 3) Amount of information to offer for the customers 4) Feedback from customers	1) Contact all tour operators and infrastructure in the region 2) Contact potential customers 3) Provide a package for each segment
	Website	1) Amount of clicks on web site 2) Amount of customers that contact the Touristic office 3) Amount of customers that organize trip	Create a website that is easy to navigate

		through web site	
Internal	Provide a good and responsive service	<ol style="list-style-type: none"> 1) Time to reply to a customer 2) Time to provide the service to the customer 3) Customer feedback 	Provide a guide of how to handle customers in different situations.
	Link Silk Road Values into the Touristic Office	<ol style="list-style-type: none"> 1) How many clicks in the Silk Road Website 2) Customer feedback and how many associate the Silk Road to the region 	<ol style="list-style-type: none"> 1) Training the staff to promote the Silk Road 2) Advertise the Silk Road with the Touristic Office
Learning and growth	Have motivated work force	<ol style="list-style-type: none"> 1) Employee feedback 2) Appraisal 	Improve the level of skills of the employee training and workshop

7.3 Reducing risks

Risk	How to reduce?
Lack of culture	The Touristic Office will still promote the cultural aspect of the region but will mostly focalize on health and wellness.
Russian investment	First of all, the government has to strictly control how government bonus are invested in the region and if it benefits to the tourism development of the Altai region. Moreover, it is essential that the Altai authorities continue this development by making sure that all investment decisions are fulfilled and by initiating and promoting new development projects. In addition, all different political entities (national and regional) have to adopt a common and very clear view about the strategy to adopt to develop Altai Krai as a main russian touristic destination.
Monetary	<p>If we imagine an economic downturn, there will be less touristic demand and the sales made through the Tourism Office will be lower than expected but will only be temporary and the demand will shoot back up after the downturn.</p> <p>If we imagine a scenario where there is no real demand for traditional medicine treatments and for this particular region of Altai, then it is possible to promote other aspects of the region such as the historical aspect focusing on the mix of cultures, museums and archaeological sites by using the Tourism Office and its distribution channels.</p>

7.4 Stakeholders table



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