

World Tourism Organization



# UNWTO

## **Tourism Visa Openness Report for the Silk Road Countries**

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# Tourism Visa Openness Report for the Silk Road Countries

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# Foreword

Tourism has over the years become one of the most dynamic economic sectors in the world. Today, it represents 9% of the world's GDP, 30% of service exports and one in every 11 jobs.

In 2012, an historic milestone for international tourism was reached when over one billion tourists travelled the world in a single year. This number is expected to rise to 1.8 billion tourists by the year 2030.

Visa facilitation is central to stimulating growth and job creation through tourism. In spite of the great strides made in recent decades to facilitate tourist travel, there are still important areas of opportunities to improve visa procedures.

The report Tourism Visa Openness Report for the Silk Road Countries presents a global vision of travel facilitation in the world, complemented with a specific analysis of this important issue along the Silk Road. Considering the size and complexity of this thematic route, comprising a wide diversity of partners in different continents, travel facilitation along the Silk Road through improved visa measures represents a significant challenge, yet also an immense opportunity to promote tourism development.

We trust this report will be an important step towards building a collaborative approach to travel facilitation along the Silk Road, contributing to the work initiated twenty year ago, when in 1994, 19 countries adopted the Samarkand Declaration on Silk Road Tourism, calling for 'the adoption of facilitation measures that would reduce travel barriers and stimulate tourist flows along the Silk Road'.

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# Executive summary

## Tourism visa around the world: 2013 snapshot

- In 2013, destinations around the world required on average two thirds of the world's population to obtain a visa prior to departure. On the other hand, some 18% of the world's population was able to enter a destination without a visa, while another 15% received a visa on arrival.
- Globally there was a significant variety in visa policies, from countries allowing almost any citizen to enter freely to countries requesting visas indiscriminately.
- Overall, emerging economies tend to be more open than advanced ones.
- South-East Asian, East African, Caribbean and Oceanian destinations were among the most open regions while Central African, North African and North American destinations were the most restrictive regions.

## Visa facilitation: 2008-2013

- Notable progress has been made in the area of visa facilitation in recent years.
- While at the beginning of 2008, destinations requested from an average of 77% of the world's population to apply for a traditional visa prior to departure, this percentage went down to 64% in 2013.
- In total, improvements of visa requirements were made in 5,930 destination-source market country pairs between 2010 and 2013.
- A total of 44 destinations significantly facilitated the visa process for citizens of 20 or more countries between 2010 and 2013, by changing their visa policies from "visa required" to either "eVisa", "visa on arrival" or "no visa required".
- Destinations, when reviewing their visa policies, tended to thoroughly review and introduce changes. Out of the 5,930 total improvements, 5,180 were done by those countries which changed their visa policies significantly.
- The most popular facilitation measure was the introduction of "visa on arrival". Nearly 60% of all improvements done

between 2010 and 2013 were from "visa required" to "visa on arrival".

- The reason for this remarkable and substantial improvement to facilitation between 2010 and 2013 is the determined action taken by governments.

## Methodological note

- UNWTO surveys visa policies around the world since 2008.
- 2013 data was collected between January and July 2013. The process included a full review of official destination websites between January to May 2013, a verification of this information against secondary public sources and a detailed formal consultation process on the findings with all national tourism authorities between May and June of 2013.

## Background on the Silk Road

Acclaimed as the 'greatest route in the history of mankind', the ancient Silk Road formed the first bridge between the East and West and was an important vehicle for trade between ancient empires of China, India, Persia and Rome. Dating back to 200BC, the route was a channel for contact between people and cultures, inspiring the exchange of dialogue, art, religion ideas and technology. With its richly diverse cultural heritage and its wealth of natural attractions spanning across 12,000 kilometres of ancient routes, the Silk Road today offers visitors the opportunity to experience a unique network of destinations, following the footsteps of some of the world's most famed explorers such as Alexander the Great and Marco Polo.

The 31 Silk Road Member States are in a unique position to leverage from each other by collaborating on a number of areas, such as marketing, product development, tourism route development, cross border initiatives, and particularly, travel facilitation. To provide a platform for networking and collaboration, UNWTO established the Silk Road Programme to raise the profile of Silk Road tourism while driving development that is sustainable, responsible and internationally competitive.

**Note:** Report prepared by Dr. Dirk Glaesser and John Kester with valuable input from Márcio Favilla, Sandra Carvão, Alla Peressolova, Lorna Hartantyo, Birka Valentin, Johanna Devine and Patrick Fritz.



## Introduction

### The dimensions of international tourism

Over the past six decades, tourism has continued to expand and diversify; it is now one of the largest and fastest-growing economic sectors in the world. Many new tourist destinations have emerged alongside the traditional ones of Europe and North America. From 1980 to 2013, international tourist arrivals (i.e., overnight visitors) more than tripled worldwide, leaping from 279 million in 1980 to 1,035 million in 2012, corresponding to an average growth of 4.2% a year.

In the same period, the export value of tourism – that is, international tourism receipts, including international passenger transport – increased from US\$ 125 billion in 1980 to US\$ 1,075 billion in 2012. In real terms, this corresponds to an average growth of 4.1% a year, which is virtually the same pace as tourist arrivals.

According to the World Tourism Organization (UNWTO) long-term forecast *Tourism Towards 2030*, international tourist arrivals are expected to continue to grow at the sustained pace of 3.3% a year on average, reaching 1.8 billion by 2030.<sup>1</sup>

International tourist arrivals in the emerging-economy destinations of Asia, Latin America, Central and Eastern Europe, Eastern Mediterranean Europe, the Middle East, and Africa will grow at double the pace (4.4% a year) of advanced economy destinations (2.2% a year). As a result, arrivals in emerging economies are expected to surpass those in advanced economies by 2015 and by 2030, 57% of international tourist arrivals will occur in emerging-economy destinations (versus 30% in 1980 and 47% in 2010). Arrivals in advanced-economy destinations will make up 43% of arrivals overall (versus 70% in 1980 and 53% in 2010).

In order to fully reap the socio-economic benefits international tourism can bring to a country, it is necessary to put in place conditions that make the country competitive among which most importantly to make it easy to visit.

## The functions of visas

Visa policies are among the most important governmental formalities influencing international tourism. The development of policies and procedures for visas, as well as for other important travel documents such as passports, is closely linked to the development of tourism. With the swift growth of international tourism in the last six decades, the quality, reliability, and functionality of visas and other travel documents has evolved. Only half a century ago, travel was heavily impacted by customs regulations, currency exchange limitations and visa formalities. A great deal of progress has been made in facilitation, which has contributed to the remarkable growth of the tourism sector. Especially noteworthy are the multilateral agreements that mutually exempt all or certain categories of travellers from the visa requirement. However, despite the progress made, namely in recent years, current visa policies are still often inadequate and inefficient, and are thus acknowledged to be an obstacle to tourism growth.

Visas perform several functions. They serve to ensure security; to control immigration and limit the entry, duration of stay, or activities of travellers; to generate revenue and apply measures of reciprocity; and to ensure a destination's carrying capacity and control tourism demand. Although 'security' is commonly stated to be the most important reason to impose a visa requirement, in practice, all the functions noted here can be observed, and form a reason to introduce or maintain a visa.

Travellers see visas mainly as a formality that imposes a cost. If the cost of obtaining a visa – either the direct monetary cost imposed in the form of fees or the indirect costs, which can include distance, time spent waiting in lines, and the complexity of the process – exceeds a threshold, potential travellers are simply deterred from making a particular journey or choose an alternative destination with less hassle. This finding is not new. It is interesting in this context to note that, in 1963, the delegates of 87 States agreed, at the United Nations Conference on International Travel and Tourism in Rome, that "Governments should extend to the maximum number of countries the practice of abolishing, through bilateral agreements or by unilateral decision, the requirement of entry visas for temporary visitors".<sup>2</sup>

<sup>1</sup> World Tourism Organization (2011), *Tourism Towards 2030: Global Overview*, UNWTO, Madrid.

<sup>2</sup> United Nations Conference on International Travel and Tourism (1964), Recommendations on International Travel and Tourism, August 21–September 5, 1963. Rome.

States represented at the conference were: Afghanistan, Algeria, Argentina, Australia, Austria, Belgium, Bolivia, Brazil, Bulgaria, Byelorussian Soviet Socialist Republic, Cambodia, Cameroon, Canada, Ceylon, Chad, Chile, China, Colombia, Congo (Leopold-Ville), Costa Rica, Cuba, Cyprus, Czechoslovakia, Denmark, Dominican Republic, El Salvador, Federal Republic of Germany, Finland, France, Greece, Guatemala, Holy See, Hungary, India, Indonesia, Iran, Iraq, Ireland, Israel, Italy, Japan, Jordan, Kuwait, Lebanon, Liberia, Libya, Luxembourg, Madagascar, Mali, Mexico, Morocco, Nepal, Netherlands, New Zealand, Niger, Nigeria, Norway, Pakistan, Paraguay, Peru, Philippines, Poland, Portugal, Republic of Korea, Romania, San Marino, Saudi Arabia, Senegal, Somalia, Republic of South Africa, Spain, Sudan, Sweden, Switzerland, Syria, Thailand, Trinidad and Tobago, Tunisia, Turkey, Uganda, Ukrainian Soviet Socialist Republic, Union of Soviet Socialist Republics, United Arab Republic, United Kingdom of Great Britain and Northern Ireland, United States of America, Venezuela and Yugoslavia. UN Specialized Agencies: FAO, UNESCO, ICAO, WHO, IMCO.

# Visa facilitation

## Areas of opportunity

Joint research by the UNWTO and the World Travel & Tourism Council (WTTC), presented to the 4th T20 Ministers' Meeting in May 2012,<sup>3</sup> demonstrates that improving visa processes could generate an additional US\$ 206 billion in tourism receipts and create as many as 5.1 million jobs by 2015 in the G20 economies.<sup>4</sup>

Further research prepared by the UNWTO and the WTTC for the APEC High Level Policy Dialogue on Travel Facilitation in October 2013 revealed that APEC countries could also gain between 38 to 57 million additional international tourist arrivals from visa facilitation, generating up US\$ 89 billion in international tourism receipts and as many as 2.6 million jobs by 2006 in the APEC economies.<sup>5</sup>

Both analyses also identified five key areas of opportunity for visa facilitation. These include: delivery of information; current processes; differentiated treatment; the use of eVisa programmes; and regional agreements. These key areas are particularly relevant to the Silk Road, as explained below:

### Improve the delivery of information

The availability and reliability of the information on entry formalities – especially visa requirements and procedures – that destinations provide were among the simplest, but also least addressed, areas of opportunity. This information, especially the elements of entry formalities of importance to the traveller, should also be available in multiple languages. Hence, Silk Road countries would benefit from ensuring that all information regarding visa requirements is up to date, readily available online and available in multiple languages for the key source markets.

- The **Republic of Korea's** website displays one of the most detailed and accurate sources regarding visa information, including practical information about the country and is available in more than ten languages.

### Facilitate current visas processes

A major opportunity for improvement is the way visa requests for temporary visitors are processed in general, as well as the requirements linked to this process. Therefore, a major opportunity for the Silk Road countries to advance is

by improving processes and requirements for temporary visitors. Whether these requirements are personal interviews, official documents, or certificates, they usually produce at least temporary bottlenecks as well as uncertainty and long wait times. Among the techniques suitable for improving these processes are the better use of modern information technologies by service providers and the consideration of visas on arrival.

- Silk Road countries that successfully introduced visa on arrival between 2010 and 2013 were **Georgia, Armenia** and **Tajikistan**, which offered 91 (Georgia), 87 (Armenia) and 79 (Tajikistan) source markets around the world to enter their country with visas on arrivals in 2013.

### Differentiate treatment to facilitate tourist travel

The technique of facilitating the visa process for certain types of visitors is widely used among countries, especially for temporary visitors who are visiting for tourism purposes. This can range from easing restrictions depending on the means of transportation – for example, cruise passengers can be allowed to disembark from the ship without a tourist visa or to arrive by charter planes – to special treatment for specified geographical areas or ports of entry.

- **China** has introduced a 72 hour transit visa-free policy for nationals of 45 countries visiting its major city destinations Beijing, Shanghai and Guangzhou. **The Russian Federation** also allows visa free entry to tourists travelling on cruise ships to St Petersburg for up to 72 hours, provided that the visitors participate in tours organized by accredited travel companies and return for the night on board the cruise ship.

### Institute eVisa programmes

Currently, the most widely discussed opportunity is the use of eVisa. If an entry visa cannot be avoided, eVisa is the option preferred over the traditional paper visa. An eVisa can be obtained digitally prior to arrival and there is no label or stamp needed in the passport required to obtain it, nor physical presence of the applicant at the embassy or consulate. These considerations are especially important for destinations without a widespread network of embassies and consulates.

<sup>3</sup> The T20 Ministers refers to the Tourism Ministers of the G20 economies. The G20 economies are Argentina, Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Japan, Mexico, Republic of Korea, Russian Federation, Saudi Arabia, South Africa, Spain, Turkey, the United Kingdom and the United States.

<sup>4</sup> World Tourism Organization and World Travel & Tourism Council (2012), *The Impact of Visa Facilitation on Job Creation in the G20 Economies*, UNWTO and WTTC, Madrid and London.

<sup>5</sup> World Tourism Organization and World Travel & Tourism Council (2013), *The Impact of Visa Facilitation in APEC Economies*, UNWTO, Madrid.

- **Turkey** and **Azerbaijan** have recently instituted eVisa programmes with great success. While Azerbaijan had entirely changed its visa system to an electronic eVisa system for all source markets around the world in 2013, Turkey started its eVisa programme originally for a selected group of countries in 2013 and is continuously expanding the list of countries applicable for it.

### Establish regional agreements

There are already a number of regional agreements in place that allow travellers from a third country to move freely between member countries once admitted by one of the participating countries. For citizens of one of the Member States of some regional agreements, such as the Schengen Area, it is even possible to travel without a passport by simply using a valid national document of identification.

- The **ASEAN** Ministers of Tourism have agreed to work towards an 'ASEAN Common Visa' as called upon by their leaders at the 2011 ASEAN Summit in Jakarta, Indonesia. This collaboration forms part of the efforts to improve social integration within the region and grow the national and regional travel and tourism sectors resulting in increasing investment in travel and tourism and job creation.

## The global and regional dimensions to visas

As a positive outcome of the UNWTO/WTTC report on the impact of visa facilitation on the G20 economies, G20 leaders recognized, at their June 2012 Summit, the role of tourism as “a vehicle for job creation, economic growth and development”.<sup>6</sup> Furthermore, they committed to “work towards developing travel facilitation initiatives in support of job creation, quality work, poverty reduction and global growth”.<sup>7</sup>

Similarly, the UNWTO/WTTC report on the impact of visa facilitation in APEC economies, demonstrated the value of visa facilitation for the APEC economies, and was recognized in the 2013 Leaders' Declaration “as a way to promote tourism and facilitate business”.

This position and other measures taken by regional blocs and individual countries to facilitate tourism visas are much welcome news; yet despite of these many strides, visa requirements still affect global tourism significantly. In 2013, destinations around the world requested, on average, that 64% of the world's population obtain a visa before initiating an international journey. Another 3% of the population was at least allowed to apply for an eVisa<sup>8</sup>, while 15% would be able to apply for a visa on arrival. Only 18% of the world's population would not require a visa at all when travelling for tourism purposes (table 1).

**Emerging economies continued to be, in 2013, more open in terms of travel requirements than advanced ones** (table 1)<sup>9</sup>. When travelling to an emerging-economy destination, on average, 62% of the world's population needed a traditional visa and 3% an eVisa; for advanced-economy destinations, 72% needed a traditional visa and 3% an eVisa. However, full exemption from a visa were more common in advanced economies (24% versus 17%), whereas in emerging economies obtaining a visa on arrival was much more common (19% versus 1%).

**From a regional perspective, destinations in Asia and the Pacific have facilitated international travel the most.** To visit Asia and the Pacific, 20% of the world's population did not require a visa, another 20% could have obtained a visa on arrival, and 6% could have used an eVisa. Southeast Asia was, together with East Africa, the most open subregion because of the large number of visa on arrival requirements (this was

<sup>6</sup> World Tourism Organization and World Travel & Tourism Council (2012), *The Impact of Visa Facilitation on Job Creation in the G20 Economies*, UNWTO and WTTC, Madrid and London, pages 17-18.

<sup>7</sup> G20 (2012), The G20 Los Cabos Summit Leaders' Declaration (online), available: <http://dtxtq4w60xqpw.cloudfront.net/sites/all/files/docpdf/g20leadersdeclaration2012.pdf>.

<sup>8</sup> In 2012, eVisas were accounted for separately for the first time. In 2008 and 2010, eVisas and visas on arrival belonged to the same category.

<sup>9</sup> No visa weighted by 1, visa on arrival weighted by 0.7, eVisa weighted by 0.5, and visa required by 0. Data for regions and subregions are average data and might not fully reflect the situation for all countries, especially in less homogenous subregions such as Africa, South Asia, and Central and Eastern Europe.

sufficient for 30% of the world's population on average) and the considerable number of visa exemptions (25%) and eVisa alternatives (6%).

When travelling to the **Americas**, 62% of the world's population was required to obtain a traditional visa prior to departure. However, this figure varied widely across the subregions of the

Americas. While North America was one of the more restricted subregions, where only 11% of the world's population could enter without a visa<sup>10</sup>, the Caribbean was, together with Oceania, the second most open subregion in the world: 39% of the world's population could enter without a visa and 2% had the ability to obtain a visa on arrival. Destinations in the two other subregions – Central and South America – also

Table 1 ▼

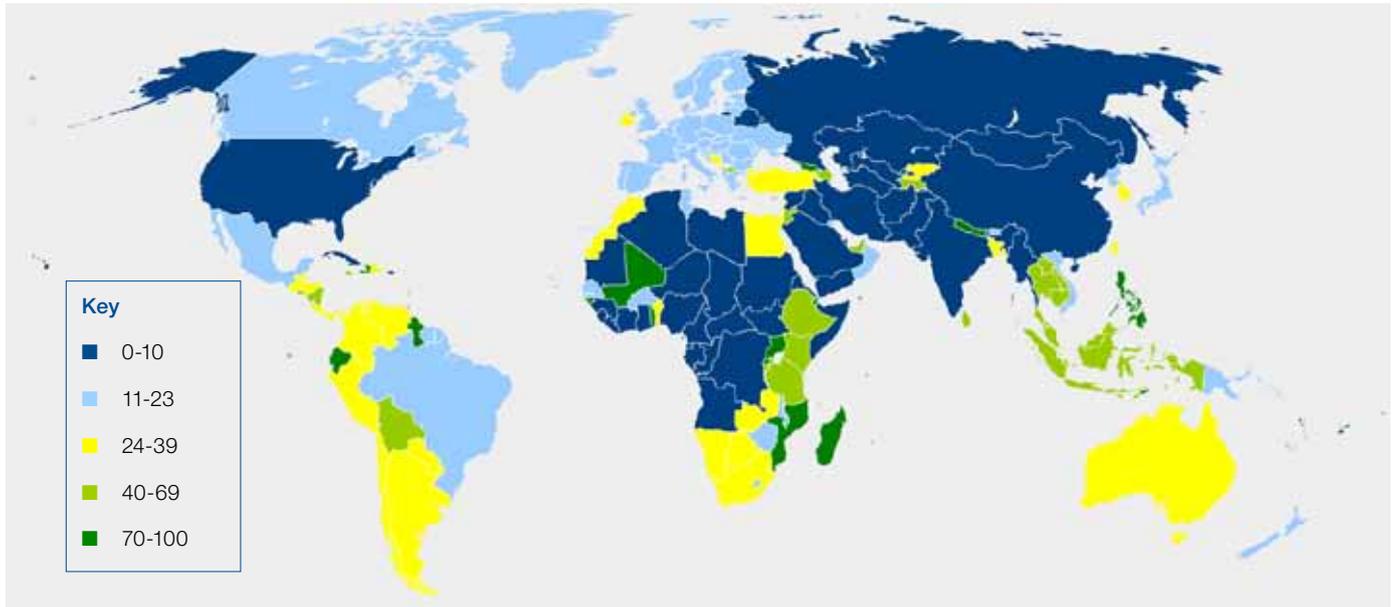
Subregions of destinations by percentage of world population affected by visa policies, 2013					
	Openness <sup>a</sup>	No visa	Visa on arrival	eVisa	Visa required <sup>b</sup>
	% of world population affected by visa policies				
<b>World</b>	<b>30</b>	<b>18</b>	<b>15</b>	<b>3</b>	<b>64</b>
Advanced economies <sup>c</sup>	26	24	1	3	72
Emerging economies <sup>c</sup>	31	17	19	3	62
<b>By UNWTO regions:</b>					
<b>Africa</b>	<b>29</b>	<b>9</b>	<b>28</b>	<b>1</b>	<b>62</b>
North Africa	14	14	1	0	85
West Africa	23	7	23	0	70
Central Africa	5	2	0	7	91
East Africa	50	8	60	0	32
Southern Africa	25	25	0	0	75
<b>Americas</b>	<b>36</b>	<b>32</b>	<b>5</b>	<b>1</b>	<b>62</b>
North America	14	11	0	6	83
Caribbean	41	39	2	1	58
Central America	36	31	8	0	62
South America	36	29	9	0	62
<b>Asia and the Pacific</b>	<b>37</b>	<b>20</b>	<b>20</b>	<b>6</b>	<b>54</b>
North-East Asia	29	26	4	1	69
South-East Asia	50	25	30	6	38
Oceania	41	25	18	6	51
South Asia	26	4	23	11	62
<b>Europe</b>	<b>24</b>	<b>21</b>	<b>3</b>	<b>2</b>	<b>74</b>
Northern Europe	23	23	0	0	77
Western Europe	23	23	0	0	77
Central/Eastern Europe	24	16	8	5	71
Southern/Mediterranean Europe	25	25	0	1	74
- of which EU-28 <sup>d</sup>	22	22	0	0	77
<b>Middle East</b>	<b>19</b>	<b>1</b>	<b>20</b>	<b>7</b>	<b>72</b>

Source: UNWTO based on information of national official institutions.

- a** Scores range from 100 to 0; the higher the score, the better. Openness indicates to what extent a destination is facilitating tourism. It is calculated by summing the percentage of the world population exempt from obtaining a visa with the percentages of no visa weighted by 1, visa on arrival weighted by 0.7, eVisa by 0.5 and visa required weighted by 0. For the (sub) regional totals, the percentages of the four different visa categories and the resulting openness score represent the averages of economies in that group (where destination economies are weighted by natural logarithm of the population size (i.e.  $\ln((1,000 \text{ population}))$ ) in order to take into account differences in destination size).
- b** Visa required means that a visa has to be obtained prior to departure and is not an electronic visa (eVisa).
- c** Advanced economies and emerging economies classifications are based on the International Monetary Fund (IMF); see the Statistical Annex of the IMF's World Economic Outlook of April 2012, p. 177, at [www.imf.org/external/pubs/ft/weo/2012/01](http://www.imf.org/external/pubs/ft/weo/2012/01).
- d** The EU-28 countries are Austria, Belgium, Bulgaria, Cyprus, Czech Rep., Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Italy, Latvia, Lithuania, Luxembourg, Malta, the Netherlands, Poland, Portugal, Ireland, Romania, the Slovak Republic, Slovenia, Spain, Sweden; United Kingdom and Croatia.

<sup>10</sup> Although not all eVisa programmes are technically classified as visas (for example, the Electronic System for Travel Authorization, or ESTA, in the United States is not a visa according to law), they are similar in form and function and have been therefore categorized as eVisas.

## Tourism visa openness index by region, 2013



**Note:** The higher the score, the better. Openness indicates to what extent a destination is facilitating tourism. It is calculated by summing the percentage of the world's population exempt from obtaining a visa, with the percentages of no visa weighted by 1, visa on arrival weighted by 0.7, eVisa by 0.5 and visa required weighted by 0.

**Source:** UNWTO based on information of national official institutions.

**Disclaimer:** The maps elaborated by UNWTO are for reference only and do not imply any judgement on the legal status of any territory, or any endorsement or acceptance of such boundaries.

abolished visas for a comparatively high number of source markets, making the Americas the leading region in terms of visa exemptions (32% of the world's population does not need a visa to visit the Americas; see table 1).

**Africa** required a visa prior to departure from 62% of the world's population, but, at the same time, had the highest percentage of countries whose visitors were able to obtain a visa on arrival (28%). However, this figure varied significantly across the African subregions. In Central Africa, the use of traditional visas – required for 91% of the world's population – was highest of all Africa's subregions. East Africa, in contrast, had the lowest in the world: only 32% of the world's population required to have traditional visas. Visa on arrival was popular in East Africa (60%), making East Africa together with South-East Asia the second most open subregions in the world.

In the **Middle East**, 72% of the world's population was required to obtain a traditional visa prior to departure to any of its destinations, but 20% were allowed to obtain a visa on arrival and 7% to use an eVisa. Interestingly, the Middle East had the highest percentage of the world's population able to apply for an eVisa. At the same time, however, the abolishment of any visa was the lowest among all five regions, with only 1% of the world population not required to obtain a visa of any kind.

**European destinations were among the more restrictive, requiring, on average, 74% of the world's population to obtain a visa before departure, while 21% was not required to obtain a visa and 3% could obtain it on arrival. All four European subregions showed more or less comparable patterns.**

### In summary,

- Visa exemption was most common in the Caribbean (39%) and in Central America (31%);
- Visa on arrival was comparatively common in East Africa (60%) and South East Asia (30%);
- eVisa was particularly popular in South Asia (11%), the Middle East (7%) and Central Africa (7%);
- Traditional visas were most prevalent in Central Africa (91%), North Africa (85%), and North America (83%), followed by the four European subregions, Southern Africa and the Middle East (all 70% or higher).

## Reciprocity

Table 2 ▼

### Least restrictive destinations, 2013

	Name of destination	Openness <sup>a</sup>
1	Cook Islands	100
	Dominica	100
	Micronesia, Federated States of	100
	Niue	100
5	Haiti	99
6	Macao (China)	85
7	Philippines	84
8	Georgia	80
	Hong Kong (China)	80
	Mauritius	80
	Turks and Caicos Islands	80
12	Fiji	78
13	Guyana	76
	Montserrat	76
	Seychelles	76
	Saint Vincent and the Grenadines	76
17	Vanuatu	75
18	Rwanda	73
19	Ecuador	72
	Mali	72
21	Cape Verde	71
	Guinea-Bissau	71
	Mozambique	71
	Nepal	71
	Togo	71
	Uganda	71

Source: UNWTO based on information of national official institutions.

a Scores range from 0 to 100; the higher the score, the better. Destinations with the same score are tied, and so have the same rank; these appear in alphabetical order in the table. Openness indicates to what extent a destination is facilitating tourism. It is calculated by summing the percentage of the world population exempt from obtaining a visa, with the percentages of no visa weighted by 1, visa on arrival weighted by 0.7, eVisa by 0.5 and visa required weighted by 0.

In 2013, 16% of all visa policies analyzed were mutually open, while 36% of the policies were mutually closed. Furthermore, in 2% of the pairs, both countries had visa on arrival, while in less than 1% of the pairs, both countries had an eVisa. The remaining 46% were non-reciprocal combinations.<sup>11</sup>

Between 2008-2013, reciprocally open policies, i.e. both countries do not require each other's citizens to obtain a visa, have slightly increased, from 14% of all pairs to 16%. In the same period, reciprocally closed policies, i.e. both countries do require each other's citizens to obtain a visa, have considerably decreased to 36%, down from 57%. However, the biggest shift has been observed in other combinations (29% to 46%) where countries have unilaterally opened up by introducing no visa required, visa on arrival or eVisa.

Analyzing openness while taking also into account the stage of economic development, the following observations can be made for 2013:

Advanced economies had among each other a high level of reciprocity in openness with 89% reciprocity of no visa required. Only in 11% of the pairs, no visa was required by one country, while a traditional visa, an eVisa, or visa on arrival was required by the other (of which only eleven cases where a traditional visa was required).

However, a negative reciprocity was dominating relationships between emerging economies with 41% of mutual policies requiring a visa, while 21% of policies were reciprocally open and in 3% both countries issued a visa on arrival. Of the asymmetric policies, most common was a visa on arrival on one end and a traditional visa on the other (24%). A unilateral exemption on one end and traditional visa on the other could be observed in 11% of the pairs.

In the case of relationships between emerging and advanced economies, in 20% of country pairs policies were reciprocally open and in 30% visa was required on both ends. In 22% of the pairs, emerging economies issued a visa on arrival, while advanced economies required traditional visa. In 19% of the pairs, the emerging economy had unilaterally exempted the need for a visa, while the advanced economy required a traditional visa.

<sup>11</sup> For this analysis of reciprocity, data has been used on 37,830 country pairs in total (195\*195-195) for the four years 2008, 2010, 2012 and 2013. As each pair is combined with its reciprocal (for instance China-France with France-China) there is consequently only half the number of reciprocal pairs (i.e. 18,915).

Table 3 ▼

World reciprocity	2008	2010	2012	2013	2013/2008 Change (% pts.)
% Reciprocal	71	68	54	54	-23
% Reciprocally 'no visa required'	14	16	16	16	+19
% Reciprocally 'visa required'	57	52	35	36	-37
% Reciprocally 'visa on arrival' or 'eVisa'	0	0	3	2	+2
% Not reciprocal	29	32	46	46	+17

Table 4 ▼

### Visa facilitation reciprocity for travel within and between the groups of advanced and emerging economies, 2013

			Travel between							
			Total	Advanced economies		Emerging economies		Emerging and advanced economies		
<b>Total</b>			<b>18,915</b>	<b>100</b>	<b>741</b>	<b>100</b>	<b>12,090</b>	<b>100</b>	<b>6,084</b>	<b>100</b>
				(%)		(%)		(%)		(%)
<b>Reciprocal</b>			<b>10,294</b>	<b>54</b>	<b>661</b>	<b>89</b>	<b>6,572</b>	<b>54</b>	<b>3,061</b>	<b>50</b>
	No visa	No visa	3,059	16	660	89	1,179	10	1,220	20
	Visa on arrival	Visa on arrival	422	2	-	-	397	3	25	0
	eVisa	eVisa	12	0	1	0	9	0	2	0
	Visa	Visa	6,801	36	-	-	4,987	41	1,814	30
<b>Not reciprocal</b>			<b>8,621</b>	<b>46</b>	<b>80</b>	<b>11</b>	<b>5,518</b>	<b>46</b>	<b>3,023</b>	<b>50</b>
	No visa	Visa	2,535	13	11	1	1,351	11	1,173	19
	Visa on arrival	Visa	4,263	23	-	-	2,933	24	1,330	22
	eVisa	Visa	693	4	-	-	506	4	187	3
	No visa	eVisa	177	1	66	9	94	1	17	0.3
	Visa on arrival	eVisa	150	1	-	-	139	1	11	0.2
	No visa	Visa on arrival	509	3	3	0.4	495	4	11	0.2
	No visa	Visa	76	0.4	-	-	-	-	76	1
	Visa on arrival	Visa	74	0.4	-	-	-	-	74	1
	eVisa	Visa	15	0.1	-	-	-	-	15	0.2
	No visa	eVisa	6	0.0	-	-	-	-	6	0.1
	Visa on arrival	eVisa	3	0.0	-	-	-	-	3	0.0
	No visa	Visa on arrival	120	0.6	-	-	-	-	120	2

Note: Advanced economies and emerging economies classifications are based on the International Monetary Fund (IMF); see the Statistical Annex of the IMF's World Economic Outlook of April 2012. P. 177, at [www.imf.org/external/pubs/ft/weo/2012/01](http://www.imf.org/external/pubs/ft/weo/2012/01).

Source: World Tourism Organization (UNWTO) ©

# Progress in recent years

Looking into the evolution of visa formalities in recent years, **data show a recent and strong tendency toward visa facilitation.** At the beginning of 2008, destinations around the world required, on average, 77% of the world's population to obtain a traditional visa before visiting; this percentage went down to 75% in 2010 and further down to 64% in 2013 (figure 1).

The reason for this remarkable and substantial improvement to facilitation between 2010 and 2013 was the determined action taken by governments. **In total, visa requirements were facilitated for 5,930 destination-source market pairs between 2010 and 2013** (table 5). Destinations facilitated the visit of citizens of another country by either simply abolishing the visa requirement altogether, or allowing a visa to be obtained on arrival or in electronic form (eVisa).

**A total of 44 destinations significantly facilitated travel for citizens of 20 or more countries by changing their visa policies from visa required to eVisa, visa on arrival, or no visa required.** These 44 destinations introduced a total of 5,180 individual measures and contributed by far the majority of the 5,930 total improvements introduced by all destinations between 2010 and 2013. This significant improvement demonstrates that destinations, when reviewing their visa policies, tended to thoroughly review and introduce changes.

**Analyzing all facilitation techniques, the most common change was from visa required to visa on arrival, which represented nearly 60% of all changes.** Although eVisa and similar measures were also introduced, their importance was still minor in comparison to the other facilitation measures.

Figure 1  
World population affected by visa policies (%)

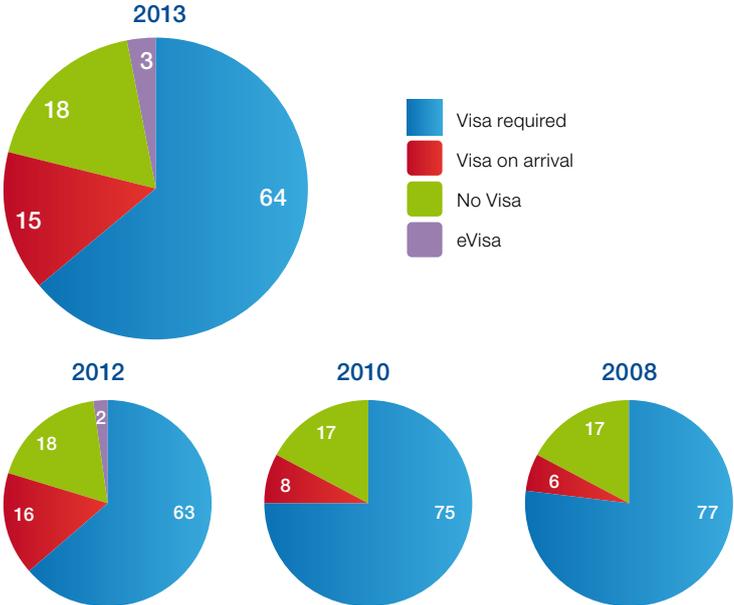


Table 5

## Destinations which improved visa procedures for 20 or more countries of origin, 2010 - 2013

Number	Destination	Number of improvements
1	Niue	195
2	Micronesia, Federates States of	194
3	Palau	194
4	Sao Tome and Principe	194
5	Djibouti	192
6	Haiti	191
7	Mozambique	189
8	Azerbaijan	181
9	Rwanda	181
10	Guinea-Bissau	180
11	Burundi	179
12	Togo	179
13	Cape Verde	178
14	Mali	172
15	Uganda	161
16	Guyana	157
17	Lao (P.D.R.)	144
18	United Arab Emirates	141
19	Kenya	140
20	United Republic of Tanzania	128
21	Ecuador	127
22	Bolivia	123
23	Macao (China)	120
24	Armenia	119
25	Sri Lanka	116
26	Georgia	111
27	Nicaragua	108
28	Montserrat	91
29	Tajikistan	79
30	Mauritius	75
31	Bonaire	57
32	Zambia	57
33	Bangladesh	55
34	Kyrgyzstan	52
35	Cayman Islands	51
36	Panama	50
37	French Polynesia	47
38	Saint Lucia	47
39	Nauru	45
40	Burkina Faso	37
41	Ethiopia	35
42	New Caledonia	34
42	Trinidad and Tobago	27
43	Australia	25
44	Swaziland	22
<b>Subtotal</b>		<b>5,180</b>
Other destinations		750
<b>Total positive changes made between 2010 and 2013</b>		<b>5,930</b>

Note: An improvement is the facilitation of a visa formality by either simply abolishing the traditional paper visa or allowing an eVisa or visa on arrival. Each destination-country of origin pair is calculated.

Source: UNWTO based on information from national official institutions.

## Outbound potential and visas

Citizens around the world are differently affected by visa policies. While some countries' citizens enjoy enormous advantages as they are hardly requested to obtain visa, neither traditional nor upon arrival, others are constantly faced with the challenge of obtaining visa before departing from their own country. However, when comparing data of 2013 and 2008 the total mobility score improved for citizens of all countries without exception. This indicates that, though at different levels, tourists are experiencing more mobility.

The following table lists those citizens which have enjoyed the highest levels of mobility in 2013. They can travel to 75% of the worlds' destinations without requiring a visa prior to departure.

Interestingly, when comparing data between 2013 and 2008 for the promising outbound markets of Brazil, Russia, China, India and South Africa (BRICS), it becomes clear that destinations are making special efforts to facilitate visa formalities for tourists originating from these prospering economies. Russian and Chinese citizens were benefitting the most from these newly introduced visa facilitation measures comparing 2013 and 2008 data. Brazilians, already enjoying a high level of mobility, continued improving further.

Data indicates that destinations competing for these fast growing outbound markets used visa facilitation as a means to increase their competitive advantage.

Table 6 ▼

Countries whose citizens are affected the least by visa restrictions		
	Most mobile citizens 2013	Mobility
1	Finland	158
2	Denmark	157
	Sweden	157
4	United Kingdom	156
	Germany	156
6	United States of America	155
	Netherlands	155
	Ireland	155
	France	155
	Belgium	155
	Portugal	155
	Singapore	155
	Spain	155
14	Luxembourg	154
	Norway	154
	Austria	154
	Italy	154

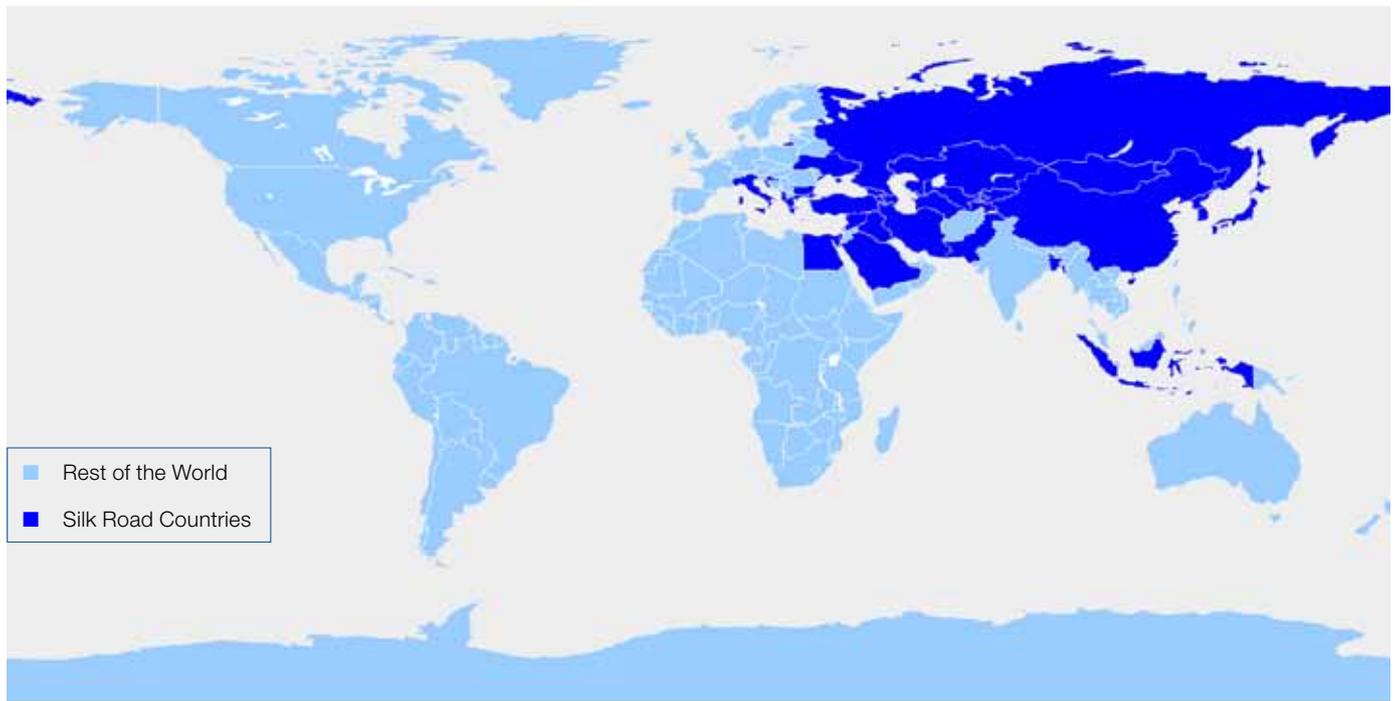
**Note:** Mobility indicates to what extent citizens around the world are affected by visa policies. The higher the score, the better. It is calculated by summing travel visa policies required of each country's citizens with weights of no visa weighted by 1, visa on arrival weighted by 0.7, eVisa by 0.5 and visa required weighted by 0.

**Source:** UNWTO based on information from national official institutions.

Table 7 ▼

Mobility score - BRICS countries	2008	2010	2012	2013	Change 2013/2008 (%)
<b>World average</b>	<b>60</b>	<b>65</b>	<b>85</b>	<b>83</b>	<b>39</b>
Advanced economies	123	127	149	148	20
Emerging economies	44	50	69	67	51
Brazil	100	108	141	141	41
Russian Federation	39	53	80	82	109
India	32	34	51	49	54
China	21	22	43	40	95
South Africa	72	73	85	82	15

# Current visa policies of the Silk Road countries



**Disclaimer:** The maps elaborated by UNWTO are for reference only and do not imply any judgement on the legal status of any territory, or any endorsement or acceptance of such boundaries.

## UNWTO Silk Road Programme – 31 Member States currently participate in the UNWTO Silk Road Programme:

Albania, Armenia, Azerbaijan, Bangladesh, Bulgaria, China, Croatia, Democratic People's Republic of Korea, Republic of Korea, Egypt, Georgia, Greece, Indonesia, Islamic Republic of Iran, Iraq, Israel, Italy, Japan, Kazakhstan, Kyrgyzstan, Mongolia, Pakistan, Russian Federation, San Marino, Saudi Arabia, Syrian Arab Republic, Tajikistan, Turkey, Turkmenistan, Ukraine and Uzbekistan.

### 8.1 Tourism visa openness of the Silk Road countries

In 2013, on average 73% of the world's population required a visa prior travelling to the Silk Road countries. A further 4% were allowed to apply for an eVisa, while 11% could apply for a visa on arrival. The remaining 12% did not require a visa for travelling to the Silk Road countries (table 8).

In comparison to the world average, the Silk Road countries are more inclined to favour traditional paper visas, at 9% points above the global average. Silk Road countries also tend to offer less visa exemptions and less visas on arrival than the world average. However, they are slightly above the average at issuing eVisas (1% higher than the global trend).

In 2013, the openness index of Silk Road countries was 21, nine points lower than the world average. Nonetheless, positive changes have been registered over the years and consistent with global trends, the emerging economies of the Silk Road increased their openness from 10 in 2008 to 21 in 2013.

Looking into the recent evolution of visa formalities shows that the strong global tendency towards visa facilitation can also be observed within the Silk Road. During 2008-2013, the percentage of the global population that required a visa prior travel to the Silk Road countries decreased from 87% to 73%, a strong improvement that sits in line with the global average. This significant improvement in visa facilitation was mainly due to the increased adoption of visa on arrivals. As a policy development that surpassed the global average, the visa on arrival growth accounted for approximately 90% of all changes made during that period, 20% higher than the world average during the same period. Improvements of visa policies during this period in the Silk Road tended to be led by its emerging economies.

Between 2010 and 2013, 28 of the 31 Silk Road countries improved their visa policies. As the table below shows, during this period Silk Road countries improved a total of 724 visa policies for citizens of other Silk Road countries and the rest of the world.

Table 8 ▼

## World population affected by visa policies

		Openness <sup>a</sup>	No visa	Visa on arrival	eVisa	Visa required <sup>b</sup>
		% of world population affected by visa policies				
2013	<b>World</b>	<b>30</b>	<b>18</b>	<b>15</b>	<b>3</b>	<b>64</b>
	Advanced economies <sup>c</sup>	26	24	1	3	72
	Emerging economies <sup>c</sup>	31	17	19	3	62
	<b>Silk Road</b>	<b>21<sup>d</sup></b>	<b>12</b>	<b>11</b>	<b>4</b>	<b>73</b>
	Advanced Silk Road Economies	25	25	0	0	75
Emerging Silk Road Economies	21	9	14	4	73	
2008	<b>World</b>	<b>20</b>	<b>17</b>	<b>6</b>	<b>-</b>	<b>77</b>
	Advanced economies	24	24	0	-	76
	Emerging economies	19	15	8	-	77
	<b>Silk Road</b>	<b>11</b>	<b>9</b>	<b>4</b>	<b>-</b>	<b>87</b>
	Advanced Silk Road Economies	24	24	0	-	76
Emerging Silk Road Economies	10	7	5	-	88	

Source: UNWTO based on information of national official institutions.

Note: In 2008, no distinction was made between eVisa and visa on arrival.

a Scores range from 100 to 0; the higher the score, the better. Openness indicates to what extent a destination is facilitating tourism. It is calculated by summing the percentage of the world population exempt from obtaining a visa with the percentages of no visa weighted by 1, visa on arrival weighted by 0.7, eVisa by 0.5 and visa required weighted by 0. For the (sub)regional totals, the percentages of the four different visa categories and the resulting openness score represent the averages of economies in that group (where destination economies are weighted by natural logarithm of the population size (i.e. in (1,000 population)) in order to take into account differences in destination size).

b Visa required means that a visa has to be obtained prior to departure and is not an electronic visa (eVisa).

c Advanced economies and emerging economies classifications are based on the International Monetary Fund (IMF); see the Statistical Annex of the IMF's World Economic Outlook of April 2012, p. 177, at [www.imf.org/external/pubs/ft/weo/2012/01](http://www.imf.org/external/pubs/ft/weo/2012/01).

d Silk Road countries have, on average, an openness index of 21. Analyzing groups within the Silk Road in more detail, advanced economies have an openness of 25 while emerging economies, the largest part in both population and number of countries, have an openness of 21. The average openness index of a rounded 21 (for all Silk Road countries) is 21.40. The openness of 21 for emerging economies, representing 25 of 31 member countries and 91% of the total population is 20.59.

Figure 2  
World population affected by visa policies  
of the Silk Road (%)

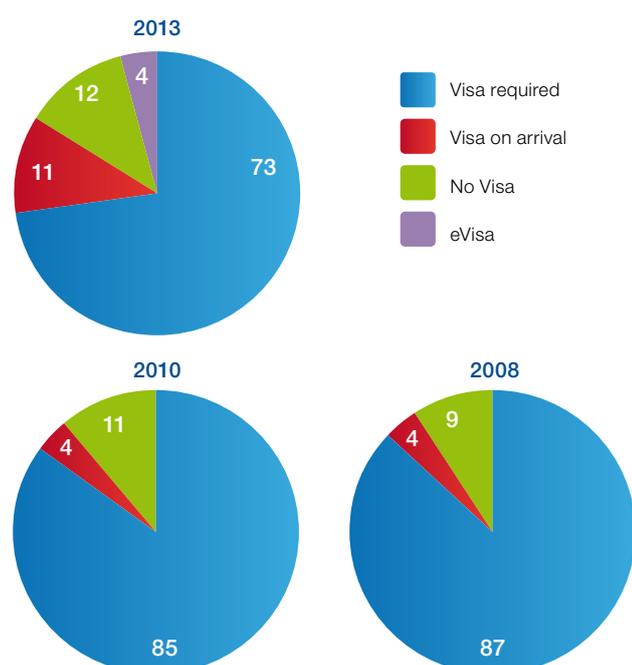


Table 9 ▼

## Silk Road destinations that improved visa procedures for 15 or more countries of origin, 2010 - 2013

Number	Destination	Number of improvements
1	Azerbaijan	181
2	Armenia	119
3	Georgia	111
4	Tajikistan	79
5	Bangladesh	55
6	Kyrgyzstan	52
7	Russian Federation	19
	Egypt	19
9	Turkey	15
<b>Subtotal</b>		<b>650</b>
Other Silk Road destinations		74
<b>Total positive changes made between 2010 and 2013 in the Silk Road</b>		<b>724</b>

Note: An improvement is the facilitation of a visa formality by either simply abolishing the traditional paper visa or allowing an eVisa or visa on arrival. Each destination-country of origin pair is calculated.

Source: UNWTO based on information of national official institutions.

Nine Silk Road countries significantly facilitated travel for citizens from 15 or more source markets between 2010 and 2013 by changing their traditional visa procedures (paper visas) to either eVisas, visas on arrival, or by abolishing visa requirements entirely. These nine countries introduced 650 individual policy improvements and contributed to the 724 total improvements made within the Silk Road during that period. This figure represents approximately 14% of all improvements made globally.<sup>12</sup>

## 8.2 Visa policies of the Silk Road countries towards different regions of the world.

In 2013, citizens of Europe and the Americas were the least affected by visa restrictions when entering the Silk Road countries for tourism purposes, with 35% and 32% of these regions' citizens being able to enter without a visa. In particular, citizens of Western and Northern Europe faced the least restrictions when visiting the Silk Road countries. This contrasts with tighter regulations still in place in the Silk Road countries for citizens of Africa.

The following outlines how the changes in visa policies for the Silk Road impacted the regions across the world:

### Traditional visa

Between 2008 and 2013, Silk Road countries diminished the requirements for traditional paper visas for all citizens of all regions of the world. In general, citizens benefitting most from this policy change were those from the Americas. However, when looking at the subregions, citizens of South America and Southern Europe faced less traditional visa requirements when travelling to the Silk Road. Due to the changes, less than 50% of the population from Europe and the Americas required a traditional visa to visit the Silk Road countries in 2013.<sup>13</sup>

In contrast, 91% of all African citizens still required a traditional visa to visit the countries of the Silk Road. However, a positive development has been observed in Azerbaijan and Georgia; both countries now offer the majority of African citizens the possibility of obtaining an eVisa or a visa on arrival.

### Visa on arrival and eVisa

With regard to visas on arrival, 15% of the citizens from the Americas could obtain this type of visa in 2013, followed by 12% of the European population as well as 12% of the citizens

from Asia and the Pacific. Within the Americas, citizens from North and South America were more able to obtain visas on arrival. North American citizens also had the greatest access to eVisas in 2013 (7%) when travelling to the Silk Road countries. For example, of the eight Silk Road countries that offered either a visa on arrival or an eVisa to South American travellers in 2013, five were European Silk Road countries. Specifically citizens of Brazil and Venezuela benefitted most from the introduction of visas on arrival and eVisa to Silk Road countries.<sup>14</sup>

### BRICS: The powerhouse of the future

The 21st century is being characterised by a shift in global economic power. Brazil, the Russian Federation, India, China and South Africa, commonly referred to as the BRICS, have shown a strong economic development in recent years which is expected to continue.

Because of their economic potential, destinations around the world have made special efforts to facilitate visa formalities for tourists originating from these prospering economies. In particular, Russian and Chinese citizens benefitted the most from newly introduced visa facilitation measures, according to data captured between 2008 and 2013. Silk Road countries have also improved their visa policies for these five markets, with Brazil and the Russian Federation as the biggest beneficiaries.

Between 2010 - 2030, a large portion of the new arrivals are expected to originate from Asia and the Pacific, making the region the second biggest outbound market after Europe in terms of total international tourist arrivals. Although Africa records the highest rate of growth at an average of 5.7% per year, Asia and the Pacific is the region that is expected to grow the most in absolute numbers, generating an average an additional 17 million international tourist arrivals annually.<sup>15</sup>

Visas are increasingly being facilitated for the Asia and Pacific source markets globally, particularly for citizens of Taiwan (Province of China), Macao (China) and Hong Kong (China). Nonetheless, the biggest focus has remained on Europe and the Americas, two regions whose citizens have traditionally had the highest flexibility when travelling the world for tourism purposes. Visa facilitation measures implemented during 2008-2013 globally have tended to focus on citizens of the Schengen Area and have generally been unilaterally introduced

<sup>12</sup> Total possible policy changes Silk Road countries can realise towards other Silk Road countries and the rest of the world are: 6,014 (31\*195-31).

<sup>13</sup> In 2008, also citizens of these two regions faced least traditional visa restrictions when travelling to the Silk Road countries, however the percentages were above 50%, with 63% of all citizens of Europe requiring a traditional visa and 67% of the citizens of the Americas.

<sup>14</sup> In 2008, no distinction was made between visa on arrival and evisa.

<sup>15</sup> World Tourism Organization (2011), *Tourism Towards 2030 / Global Overview*, UNWTO, Madrid.

## Population of the following (sub)regions affected by visa policies of the Silk Road countries, 2013 (%)

	No visa	Visa on arrival	eVisa	Visa required <sup>b</sup>
<b>Europe</b>	<b>35</b>	<b>12</b>	<b>4</b>	<b>48</b>
North	39	14	6	41
West	41	14	4	41
Central and East	31	9	4	56
South	36	15	4	45
<b>Asia and Pacific</b>	<b>4</b>	<b>12</b>	<b>3</b>	<b>81</b>
North East	5	18	3	74
South East	9	10	4	77
Oceania	25	15	5	54
South Asia	0	8	3	89
<b>Americas</b>	<b>32</b>	<b>15</b>	<b>5</b>	<b>48</b>
North	35	17	7	42
Caribbean	10	8	6	76
Central	30	7	3	61
South	31	15	3	51
<b>Africa</b>	<b>2</b>	<b>4</b>	<b>3</b>	<b>91</b>
North	8	6	3	83
West	1	3	3	93
Central	0	5	3	92
East	1	3	3	93
South	6	11	6	77
<b>Middle East</b>	<b>8</b>	<b>7</b>	<b>4</b>	<b>81</b>

Source: UNWTO based on information of national official institutions.

### 8.3 The Silk Road in comparison to thematic and economic blocs

In 2013, the visa policies of the Silk Road countries were generally less open compared to those of economic blocs such as G20, APEC, OECD or SADC. Nonetheless, when compared to these economic blocs, the Silk Road countries showed the second highest increase in openness between 2008 and 2013.<sup>16</sup>

Often, most of the countries of thematic routes are also members of existing economic blocs. For example, more than 90% of the countries of the IteI Viltis Route and the Mekong River Commission belong to economic blocs such as the OECD, the EU, APEC or G20. However, in the case of the Silk Road, only some 60% of the countries belong to economic blocs.<sup>17,18</sup>

The relatively low percentage of the Silk Road members belonging to established economic blocs creates impediments in terms of tourism development. Often, a membership in agreements negotiated for trade purposes tends to generate benefits for the development of the tourism sector at a later stage. For example, previous reports published by UNWTO<sup>19</sup> have revealed the positive correlation between economic blocs and visa free entry, demonstrating the benefits of international trade agreements for travellers. When compared to these established economic blocs, the Silk Road tends to offer less visa free entry conditions than average.

Thematic routes have a higher propensity to offer visas on arrival than the aforementioned economic blocs. Of all the economic blocs and thematic routes analysed in 2013, the SADC, Mekong River Commission, KAZA and the Silk Road had the highest percentage of visa on arrival, with 31%, 27%,

<sup>16</sup> For this report, a division has been made between officially established economic blocs whose Member States cooperate due to a variety of economic interests (such as the OECD or APEC) and thematic routes or blocs (which do not necessarily have to have the character of a route), whose countries cooperate mainly due to interests driven to develop tourism.

<sup>17</sup> Other thematic routes and cooperations analysed in 2013 were: the IteI Viltis Route, Mekong River Commission, the Routes of the Olive Tree, the Viking Route, Abraham Path, KAZA, the Iron Curtain Trail and Hansa.

<sup>18</sup> Economic blocs analysed can be found in the back of the report.

<sup>19</sup> World Tourism Organization (2013), *Tourism Visa Openness Report – T.20 edition*, UNWTO, Madrid.

15% and 11% respectively of the world population being able to apply for a visa on arrival when visiting these areas.

#### 8.4 Reciprocity

In 2013, 16% of all visa policies adopted between Silk Road countries were reciprocally open, meaning that visa free policies were introduced mutually between Silk Road countries. This figure correlated with the world average registered during the same year. On the contrary, 50% of all Silk Road visa policies were mutually closed (requiring traditional visa on a mutual basis), compared to the global average of 36%. Less than 1% of the country pairs had implemented mutual visa on arrival requirements and no countries required eVisas from one another. The remaining 34% were non-reciprocal.<sup>20</sup>

Between 2008 and 2013, reciprocally open visa policies increased from 13% to 16%. From a total 465 possible reciprocal pairs of Silk Road countries, 74 pairs were mutually open in 2013. During the same period, reciprocally closed policies decreased from 70% to 50%. This means that around 231 of 465 reciprocal country pairs were mutually requiring traditional visa from their citizens in 2013. This development is in line with global trends, where reciprocally closed policies decreased from 57% to 36%.

Also consistent with the global trend, other combinations adopted among Silk Road countries, such as unilateral visa facilitation measures, increased from 17% to 34%.

Table 11 ▼

Silk Road reciprocity	2008	2010	2013	2013/2008 Change (% pts.)
% Reciprocal	83	83	66	-17
% Reciprocally 'no visa required'	13	16	16	3
% Reciprocally 'visa required'	70	67	50	-20
% Reciprocally 'visa on arrival' or 'eVisa'	0	0	0	0
% Not reciprocal	17	17	34	17

When comparing open reciprocity among Silk Road countries with the open reciprocity within other economic blocs, higher visa exemptions between members of economic blocs can be observed than that of the Silk Road.

Within the Silk Road, all advanced economies had already adopted visa free policies toward each other in 2008. As previously mentioned, emerging economies (as observed at the global level) strongly implemented facilitation measures, decreasing the standard of reciprocally closed policies from 74% in 2008 to 54% in 2013. As this was done mostly by the implementation of unilateral facilitation measures, the amount of mutually open visa policies between emerging economies of the Silk Road region has not increased to the same extent (only 2%) as the decrease of mutually closed visa policies.

Although the decrease of reciprocally closed visa policies between Silk Road countries (-20% pts.) resembles the world

average (-21% pts.), members of established economic blocs tend to already have a much lower degree of reciprocally closed visa policies. Thus, Silk Road countries can still improve by modifying prevailing visa requirements; that is, changing traditional visas to no visa, visas on arrival or eVisas.

Within economic groups such as OECD, G20 and APEC, wider gaps between reciprocally open visa requirements among Members States in comparison to open reciprocity between Members States and non-members can be observed than in the Silk Road. This demonstrates that the benefits for travellers belonging to the Silk Road countries (in terms of visa free travel) are not as extensive as for citizens belonging to other economic blocs like OECD. As a result, potential for the Silk Road countries lies particularly in increasing mutually open visa policies so that member countries can benefit from belonging to this thematic route.

<sup>20</sup> For this analysis of reciprocity, data has been used on 930 visa relationships in total (31 Silk Road countries\*31-31). As each country pair (e.g. Croatia – Japan) is combined with its reciprocal (Japan – Croatia) there is consequently only half the number of reciprocal country pairs within the Silk Road (i.e. 465).

Figure 3  
Open reciprocity among members of selected economic blocs, 2013

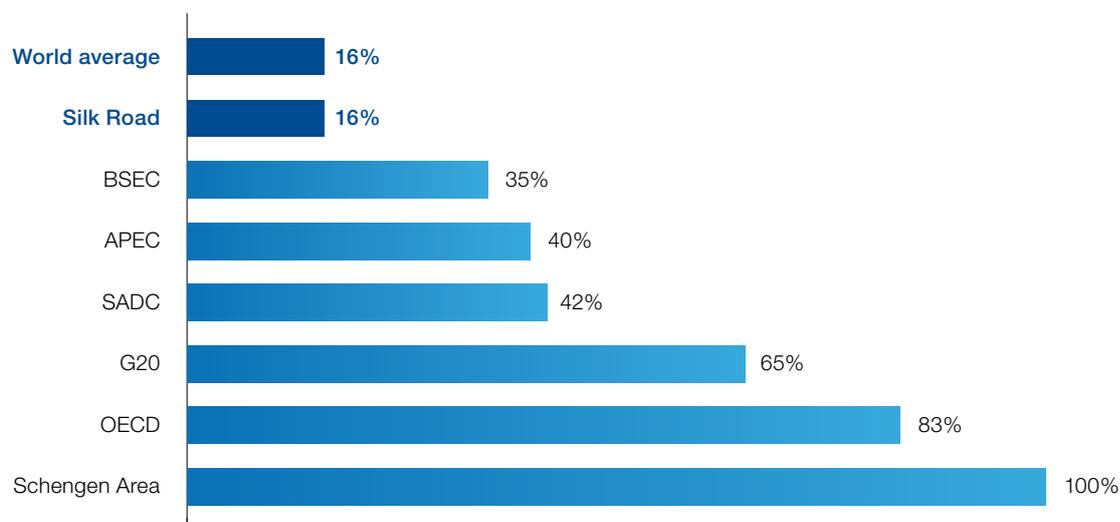
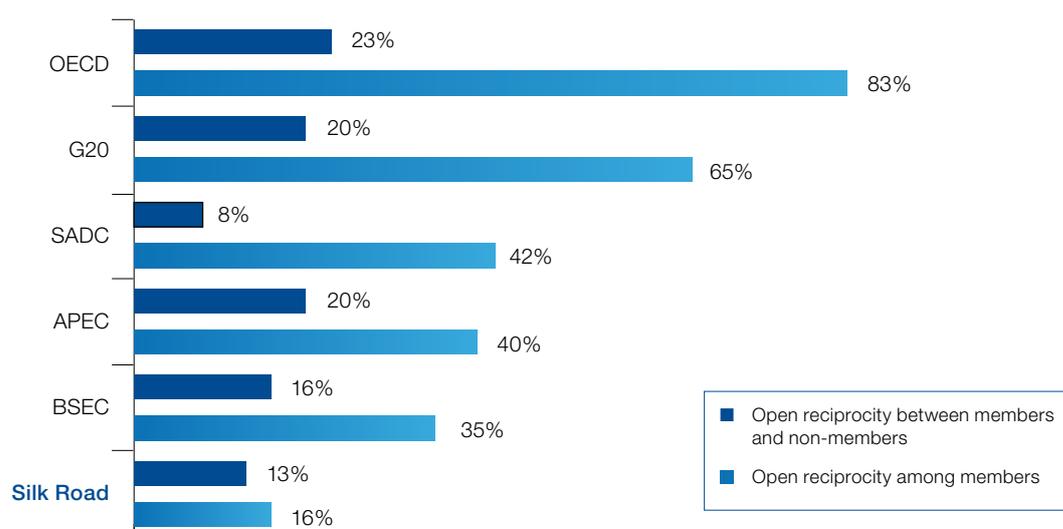


Figure 4  
Open reciprocity among members and between members and non-members of the Silk Road and selected economic blocs, 2013



Previous studies by UNWTO<sup>21</sup> have shown that the benefits of visa facilitation within economic blocs are not limited to the bloc's members but also affect the relations with non-members. This is also applicable in the case of the Silk Road countries. Although somewhat lower than the average world open reciprocity of 16%, the Silk Road's open reciprocity to non-members ranges at 13%, which is, for

example, higher than that of the SADC (8%). This indicates that priority action between Silk Road countries has a multiplier effect, from which the region as a whole benefits.

<sup>21</sup> World Tourism Organization (2013), *Tourism Visa Openness Report – T.20 edition*, UNWTO, Madrid.

## Outlook

In 1963, the United Nations Conference on International Travel and Tourism stressed the dependency of tourism development on the actions of governments, especially the facilitation of governmental formalities for international travel. Fifty years later, in November 2012, the UNWTO/World Travel Market Ministers' Summit in London concluded that visa processes and policies still present major barriers to travel and tourism.

However, it is evident that the link between visa facilitation and economic growth through tourism is increasingly recognized by national authorities, which have accompanied such recognition with concrete facilitation measures.

With its unique composition, offering tourists multi-cultural experiences along the historic route, Silk Road countries hold great potential in advancing visa facilitation as a powerful instrument of regional integration and development.

Building on the work initiated in 1994 when the Samarkand Declaration in Silk Road Tourism was signed, Silk Road countries will be able to stimulate further growth and job creation through a proactive, collaborative approach that enables tourists to move more easily between member countries.

UNWTO will continue to promote and advocate for visa facilitation to support economic growth and development through tourism. As requested by the 94th session of the UNWTO Executive Council (October 2012) UNWTO has prioritized visa facilitation within its work. In cooperation with the International Civil Aviation Organization (ICAO), the Organisation for Economic Co-operation and Development (OECD), the Asia-Pacific Economic Cooperation (APEC), the World Travel & Tourism Council (WTTC) and other partners, UNWTO will continue to provide case studies, evidence of the relationship between visa facilitation and tourism growth as well as benchmarking information to support this important process of visa facilitation for tourism.

# Selected regional and economic blocs

## Overview regional and economic blocs

<b>APEC</b> (Asia-Pacific Economic Cooperation)	21 member economies	Australia, Brunei Darussalam, Canada, Chile, China, Hong Kong (China), Indonesia, Japan, Republic of Korea, Malaysia, Mexico, New Zealand, Papua New Guinea, Peru, Philippines, Russian Federation, Singapore, Taiwan (Province of China), Thailand, United States of America, Vietnam
<b>ASEAN</b> (Association of Southeast Asian Nations)	10 member economies	Brunei Darussalam, Cambodia, Indonesia, Lao People's Democratic Republic, Malaysia, Myanmar, Philippines, Singapore, Thailand, Vietnam
<b>BSEC</b> (Black Sea Economic Cooperation)	11 member economies	Albania, Armenia, Azerbaijan, Bulgaria, Georgia, Greece, Moldova, Romania, Russian Federation, Turkey, Ukraine
<b>CAFTA-DR</b> (Dominican Republic - Central American Free Trade Agreement)	7 member economies	Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua, Dominican Republic, United States of America
<b>ECOWAS</b> (Economic Community of West African States)	15 member economies	Benin, Burkina Faso, Cape Verde, Gambia, Ghana, Guinea, Guinea-Bissau, Côte d'Ivoire, Liberia, Mali, Niger, Nigeria, Senegal, Sierra Leone, Togo
<b>G20</b>	21 member economies	Argentina, Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Japan, Mexico, Russian Federation, Saudi Arabia, South Africa, Republic of Korea, Turkey, United Kingdom, United States of America, Spain*, European Union
<b>NAFTA</b> (North American Free Trade Agreement)	3 member economies	Canada, United States of America, Mexico
<b>OECD</b> (Organisation for Economic Co-operation and Development)	27 member economies	Australia, Austria, Belgium, Canada, Chile, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Israel, Italy, Japan, Republic of Korea, Luxembourg, Mexico, Netherlands, New Zealand, Norway, Poland, Portugal, Slovakia
<b>PAFTA</b> (Pan-Arab Free Trade Area)	17 member economies	Egypt, United Arab Emirates, Bahrain, Jordan, Tunisia, Saudi Arabia, Sudan, Syrian Arab Republic, Iraq, Oman, Palestine, Qatar, Kuwait, Lebanon, Libyan Arab Jamahiriya, Morocco, Yemen
<b>SADC</b> (Southern African Development Community)	14 member economies	Angola, Botswana, Democratic Republic of the Congo, Lesotho, Malawi, Mauritius, Mozambique, Namibia, Seychelles, South Africa, Swaziland, United Republic of Tanzania, Zambia, Zimbabwe
<b>Schengen Area</b>	26 member economies	Austria, Belgium, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Italy, Latvia, Liechtenstein, Lithuania, Luxembourg, Malta, Netherlands, Norway, Poland, Portugal, Slovakia, Slovenia, Spain, Sweden, Switzerland

\*Spain is a permanent G20 invitee and also included in the report.

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