



**Tourism Department,  
Government of Gilgit Baltistan.**

# Tourism Development in Gilgit Baltistan.

*Situation Analysis and Investment  
Opportunities*

By

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# Tourism Development Matrix

## Resources

Natural Resources

Diverse Culture and Public's Attitude

Govt. Policies and Infrastructure

## By - Products

Eco-Tourism

Adventure Sports

Cultural Tourism

Leisure Tourism

Health and Wellbeing Tourism

Heritage and Historical Tourism

Mountaineering and Trekking

Culinary Routes

Hunting ,  
Angling and  
Birding

## Allied Industry

Hotel, Resorts and Accommodation

Food and Beverages

Transportation

Sports and Mountaineering Goods

Skill Development

Entertainment

Travel Services

Handicraft and Shopping

Environmental Assessment

Sanatoriums and Wellbeing

# What does the GB Offer ? Unique Landscape and Pristine Nature

- ❑ **Worlds Most Famous Mountain Ranges**
- ❑ **The Himalayas, Karakorum & Hindukush.**
- ❑ **K2 World's Second Highest Peak.**
- ❑ **Five over 8000 Meters Peaks.**
- ❑ **101 Peaks over 7000 Meters.**
- ❑ **5100 Glaciers.**
- ❑ **2200 Sq. Miles of Snow Covered Area.**
- ❑ **119 Lakes.**

# What does the GB Offer ? Biodiversity in Wildlife and High Altitude Forests

- ❑ 4 National Parks
- ❑ 09 Game Reserves
- ❑ 3 wildlife sanctuaries
- ❑ 230 species of Birds
- ❑ 54 Species of mammals
- ❑ 20 species of fresh water fish
- ❑ 23 species of reptiles
- ❑ 6 of amphibians
- ❑ **6592 Sq. KM of Forests, which constitutes 9.1 % of the total area**

# What does the GB Offer ? Cultural Diversity and a Tradition of Hospitality

- ❑ 5 ethnic groups and 5 ethnic languages with 36 dialects.
- ❑ 7 Asia Pacific Heritage Conservation, UNESCO and British Airways Award Winning Historical Sites.
- ❑ 23 Historical Forts.
- ❑ 75 Polo grounds.
- ❑ 65 Archeological sites.
- ❑ More than 39,000 Rock carvings and inscriptions.
- ❑ Year long festivals all around the Gilgit Baltistan.
- ❑ Indigenous music.
- ❑ **A centuries old culture of hospitality and acceptance of visitors.**

# What does the GB Offer ? Strategic Location and Historical Linkages.



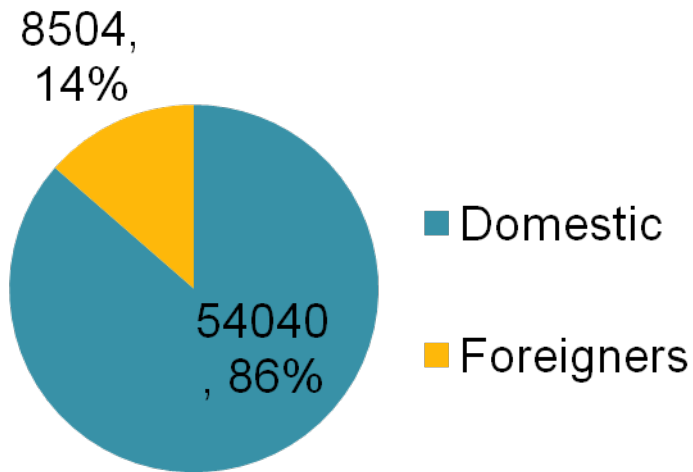
- Centuries Old trade and travel route.
- The only part of Pakistan to border and neighbor four countries.
- Presence of International Road Network.



# Has the Potential Being Tapped

?

## Average Tourist Inflow on the Basis of Last 3 Years Data



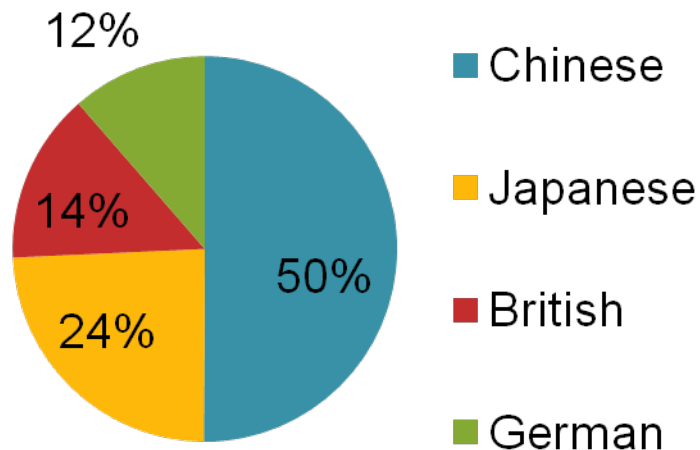
## Reasons for Poor Inflow.

- ❑ Negative perception of security due to the label of Northern Areas.
- ❑ Travel advisories suggesting against travelling on KKH.
- ❑ Poor condition of KKH often blocked by land slides.
- ❑ Lack of alternate to KKH.
- ❑ Unpredictable flight scheduling and the woes of PIA booking.
- ❑ Absence of International airports.
- ❑ Centralized issuance of permits and conduct of briefing and debriefing in Islamabad.
- ❑ Lack of tourist facilities at the tourist attractions.
- ❑ Lack of skilled manpower despite a reasonable literacy rate.
- ❑ Harassment by porters and local guides.

# Has the Potential Being Tapped

?

## Average of the Last 3 Years Nationalities wise Breakdown of Visitors



## Reasons for Poor Inflow-Contd.

- ❑ Lack of authentic tourism related data and base line study by reputed parties.
- ❑ Lack of online information.
- ❑ Reluctance of major travel insurance companies to insure foreign tourists.
- ❑ Difficulty in acquiring Pakistani visa.
- ❑ Absence from domestic and international tourism trade fairs.
- ❑ Absence of Tourism Policy.
- ❑ Mushroom growth of civil structures due to absence of zoning laws.
- ❑ Lack of an investment policy.



# Current Developments and Future Vision : Scenario 2012

## Future Transit Corridor From Gawadar to Kashgar



### 1. Access :

- ❑ Widening and Improvement of KKH from Khunjrab till Bisham – first phase to complete in 2011.
- ❑ Construction of road from Mansehra till Chilas, avoiding the KKH – To be made operational in 2011.
- ❑ Upgradation of both Gilgit and Skardu Airports to Instrumental Navigational Facilities from Visual ones. 60 % and 80 % work already completed.
- ❑ Plans to make both airports international with regional flights to Kashgar , Urumqi, Nepal and to Tajikistan, as per the Transition Plan.
- ❑ Construction of new roads and bridges within the Gilgit Baltistan.
- ❑ Widening of NATCO network to Lahore and Peshawar.

# Scenario 2012-Contd

## 2. Political Reforms and Visitors Safety :

- ❑ The G.B. Empowerment Ordinance 2009 has installed a home grown representative government with most of the subjects to be dealt at the local level.
- ❑ A package of Rs. 15 Billion Development package has been approved for the next 3 years, earmarking major tourism related projects.
- ❑ It is the safest place for tourists in Pakistan.
- ❑ 100 % increase in the Police force.
- ❑ As per the 18<sup>th</sup> Amendment in the Constituion of Pakistan, concurrent list has been abolished thus transferring tourism to local level, which means local processing of permits and briefings.

## 3. Local Tourism Development Initiatives:

- ❑ Tax Free Zone.
- ❑ Implementation of Rs. 1 Billion Tourism and Culture development package for the next two years.
- ❑ Establishing of Mountaineering Institute in Skardu.
- ❑ Fixing and implementation of porter wages.
- ❑ Development of Tourist Facilitation Centers at both the airports and all other access points.
- ❑ Development of websites and tourism promotion material.
- ❑ Promotion of GB at International and Domestic Travel Trade shows.

# Scenario 2012-Contd

## 4. Local Tourism Development Initiatives:

- ❑ Establishment of Environment Protection Agency (EPA) for cleaning of treks and tourist attractions.
- ❑ Legislation regarding zoning of tourist spots in the process.
- ❑ Base line studies on current tourism situation and future trends are being developed by JICA and the World Bank.
- ❑ MoU being signed with the WWF Pakistan for creation of tourism related GIS data.
- ❑ MoU signed with the Government of Xingiang for promotion of regional tourism – Approx 2.0 Million domestic visitors visit Kashgar each year. They can all be allowed on a border pass.

## 5. National Tourism Development Initiatives :

- ❑ Draft National Tourism Policy in the process of approval , suggesting incentives for investment in tourism infrastructure.
- ❑ Visa on arrival for 24 tourist friendly nations.
- ❑ Abolition of Police Reporting requirement except for countries on B List.

# Projected Trends – Scenario 2012

2010 – Tourist Inflow is 62000 Per Annum

2012- Expected Tourist Inflow will be at least 150,000 Per Annum

- ❑ No direct international flights.
- ❑ 16 domestic flights/ week from only Islamabad with an average cancellation rate of 30 % .
- ❑ Poor and unsafe road links.

- ❑ Atleast 7 international flights/week.
- ❑ Twice as many flights from Islamabad, Karachi and Lahore with minimal cancellation due to instrument navigation and night landing facility.
- ❑ Twice the size of NATCO fleet.
- ❑ Year round high speed ,safe and multiple road links from Islamabad and Kashgar.

# Opportunities for Investment

## 1. Accommodation and Hotels :

*Current capacity is 2450 rooms of 1-4 star ratings.*

### **Proposed :**

- ❑ Camping Sites.
- ❑ Recreational Vehicle Parks.
- ❑ Theme Resorts.
- ❑ Bed and Breakfast.
- ❑ Hotels, Motels.
- ❑ Winter and Summer Resorts.
- ❑ Community run rooms and houses.

## 2. Transport :

*Only PIA and NATCO operate for and within GB.*

### **Proposed:**

- ❑ Private Airlines and Helicopter services.
- ❑ Private tour buses.
- ❑ Recreational and camping vehicles.

# Opportunities for Investment- Contd.

## 3. Adventure Sports :

*No major GB run adventure infrastructure.*

### **Proposed Businesses in :**

- ❑ Rafting.
- ❑ Paragliding.
- ❑ Skiing.
- ❑ Rock Climbing.
- ❑ Mountain Biking.
- ❑ Trophy Hunting.
- ❑ Angling.
- ❑ Ballooning.

## 4. Entertainment – Investment Proposed:

- ❑ Theme and Play Parks.
- ❑ Cable cars and chair lifts in scenic areas.
- ❑ Boats and Steamers.
- ❑ Snow Mobile Vehicles.
- ❑ Cinemas.
- ❑ Indoor and outdoor sports Infrastructure.



# Opportunities for Investment- Contd.

## 5. Food and Beverages :

*The area is rich in fresh organic food , dairy products and fruits.*

### **Proposed Investment :**

- ❑ Tourist Café s and Coffee Shops.
- ❑ MNC fast food outlets or cabins.
- ❑ Indigenous food outlets.
- ❑ Dry fruit and Juices industry.
- ❑ Fish and Meat processing.

## 6. Health Care and Eco Tourism.

*Immense potential due to clean air and untouched areas.*

### **Proposed Investment :**

- ❑ Eco tourism .
- ❑ Wellbeing and Spa Resorts.
- ❑ Sanatoriums.
- ❑ Wildlife and Bird watching Tours.

# Opportunities for Investment- Contd.:

## 7. Cultural Tourism :

*AKCSP and Serena hotels have already realised the potential and invested heavily in this field.*

### Proposed Investment :

- ❑ Development of old Forts and turning into museums or hotels.
- ❑ Buying Polo grounds and teams.
- ❑ Filming locations.
- ❑ Development of cultural troupes.
- ❑ Historical Sites Tours.
- ❑ Rock Carving Tours.
- ❑ Silk Route Tours across Central Asia.

## 8. Travel Services – Proposed Investment:

- ❑ Organise Porter and tour guides.
- ❑ Establish international tour companies.
- ❑ Provide ticketing and booking services.
- ❑ Provide software and hardware for hotel and transportation industries.

# Opportunities for Investment- Contd.

## 9. Skill Development :

- ❑ Hospitality management training institutes.
- ❑ Foreign languages training schools.
- ❑ Airline ticketing and booking training.
- ❑ Kitchen and restaurant services training.

## 10. Sports and Mountaineering Supplies .

## 11. Tourism Promotion material Supplies.

## 12. Travel Insurance.

## 13. Handicrafts development , sale and export.

## 14. Shopping centers for domestic and foreign tourists.

# Enabling Factors for Investment

- ❑ Safe.
- ❑ Tax Free.
- ❑ Government Support in Purchase of Land and Business Development.
- ❑ Lending through Micro Credit and Karakorum Cooperative Banks.
- ❑ Proximity with China for Import of Tourism Related products.
- ❑ Proximity with China and Central Asia for export of Tourism related products.

**THANK YOU .  
Q & A - COMMENTS**