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- 08.00.08 Buxgalteriya hisobi, iqtisodiy tahlil va audit
- 08.00.09 Jahon iqtisodiyoti
- 08.00.10 Demografiya. Mehnat iqtisodiyoti
- 08.00.11 Marketing
- 08.00.12 Mintaqaviy iqtisodiyot
- 08.00.13 Menejment
- 08.00.14 Iqtisodiyotda axborot tizimlari va texnologiyalari
- 08.00.15 Tadbirkorlik va kichik biznes iqtisodiyoti
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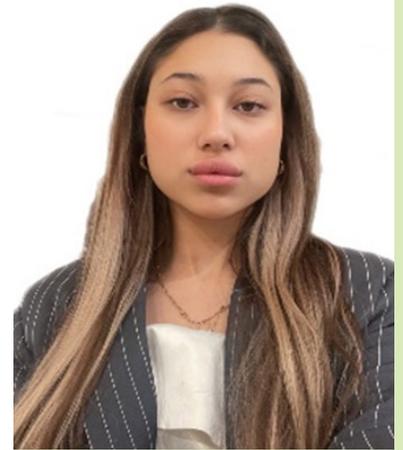


MUNDARIJA

Strategies for achieving sustainable growth through green economy transition.....	14
Umida Kakhramonova Gayratovna, Tillayev Khurshidjon Sulaymon oglu	
Current state and development prospects of tourism: comparative analysis and Uzbekistan's experience.....	20
Risolatbonu Shakhzodova, Laziza Khalilova, Nabijonov Biloliddin, Aziza Usmanova	



CURRENT STATE AND DEVELOPMENT PROSPECTS OF TOURISM: COMPARATIVE ANALYSIS AND UZBEKISTAN'S EXPERIENCE



Laziza Khalilova

Foundation student of the International Double Degree Faculty of TSUE with IMC UAS Krems

Risolatbonu Shakhzodova

Foundation student of the International Double Degree Faculty of TSUE with IMC UAS Krems



Nabijonov Biloliddin

Foundation student of the International Double Degree Faculty of TSUE with IMC UAS Krems



Aziza Usmanova

Senior Lecturer of IMC Krems Transnational Department, Tashkent State University of Economics

Abstract: This article presents a comprehensive analysis of the current state and development prospects of Uzbekistan's tourism sector in comparison with international practices. By examining cases from Kazakhstan, Georgia, Turkey, France, and the UAE, the study identifies both strengths and weaknesses of the national tourism model. Special attention is given to digital transformation, branding, state support, and sustainable tourism. Based on the analysis, the article offers recommendations to modernize Uzbekistan's tourism policy in line with global trends.

Key words: tourism, Uzbekistan, digitalization, comparative analysis, infrastructure, sustainable development, international experience.



promote its Silk Road legacy align with this perspective. Moreover, research by Crouch and Ritchie introduced the Destination Competitiveness Model, which has been used to assess Uzbekistan's relative positioning in Central Asia, suggesting that although natural and cultural resources are strong, infrastructure and international accessibility require improvement.

From a policy standpoint, OECD publications have emphasized the necessity of cross-sectoral coordination and stakeholder engagement in tourism planning. Uzbekistan has moved toward this model through the creation of the State Committee for Tourism Development, which now coordinates efforts between regional authorities, the private sector, and international partners. However, as highlighted in the World Bank's tourism diagnostic for Uzbekistan, challenges remain in ensuring quality standards, developing human capital, and enabling private investment.

Recent academic studies by Olga Kalinina and the Institute of Strategic and Regional Studies also emphasize the role of digital transformation in enhancing tourist engagement. The integration of smart tourism technologies, including virtual tours, mobile guides, and real-time service reviews, is considered essential for competitiveness, especially in post-pandemic recovery phases.

In summary, the literature reveals that Uzbekistan's experience reflects broader global patterns in tourism development, but also illustrates specific challenges of a post-Soviet, landlocked economy seeking integration into the international tourism market. Strategic branding, institutional reforms, and digital modernization are identified as the most effective levers for sustainable tourism development.

RESEARCH METHODOLOGY

This study uses a comprehensive methodological approach, including comparative analysis, analytical and statistical data processing and case analysis. The main sources of information were the official statistics of the Republic of Uzbekistan, data from international organizations (UNWTO, WTTC, OECD), national legislation, strategic documents, as well as expert assessments and materials from thematic interviews [5, 6]. The analysis criteria included the level of tourism infrastructure, investment volume, human resources, measures to promote tourism services, and the degree of digitalization of the industry. For a comparative analysis, countries with different models of tourism development were selected – Kazakhstan, Georgia, Turkey, France and the UAE. The chronological framework covers the period from 2018 to 2024, and the geographical framework covers Uzbekistan and the mentioned countries [12, 16].

ANALYSIS AND RESULTS

Tourism in Uzbekistan has become one of the priorities of socio-economic development in recent years. According to the State Committee for Tourism Development and International Organizations, 6.626 million foreign tourists visited the republic in 2023, which is 98% of the pre-crisis level of 2019 (6.748 million) [13]. This recovery of the industry after the COVID-19 pandemic indicates the high potential of domestic and inbound tourism in the country.

The contribution of tourism to the gross domestic product is estimated at about 5%, due to active investments in infrastructure, digitalization of tourism services, as well as the promotion of Uzbekistan as one of the key areas of cultural and educational tourism in the post-Soviet space [14]. In 2022, more than 226,000 people were employed in the tourism sector, accounting for about 1.6% of total employment. The inflow of foreign direct investment in 2023 reached 7.2 billion US dollars, with a significant part of it directed to the development of the hotel business, transport logistics and tourism clusters [17].

The modern model of tourism in Uzbekistan is formed on the basis of diverse directions. The central place is occupied by cultural and historical tourism, focused on the rich heritage of the ancient cities of Samarkand, Bukhara, Khiva and Shakhrisabz, included in the UNESCO World Heritage List [12]. Ecotourism and adventure tourism are becoming very popular, offering routes through the mountains of the Chatkal range, the Kyzylkum deserts and nature reserves. A promising area is gastronomic tourism, which is actively promoted due to the uniqueness of Uzbek cuisine and the organization of national culinary festivals [9].

Considerable attention is also being paid to the development of religious and pilgrimage tourism, which implements programs to restore holy sites and improve the reception conditions for pilgrims. There are over 1,200 sites of spiritual and religious significance in the country, which allows us to count on a steady increase in the number of tourists from Islamic countries [2, pp. 789-797]. Event tourism is also developing, including through the organization of international festivals, exhibitions and national holidays that attract both foreign visitors and domestic tourists (Figure 1).

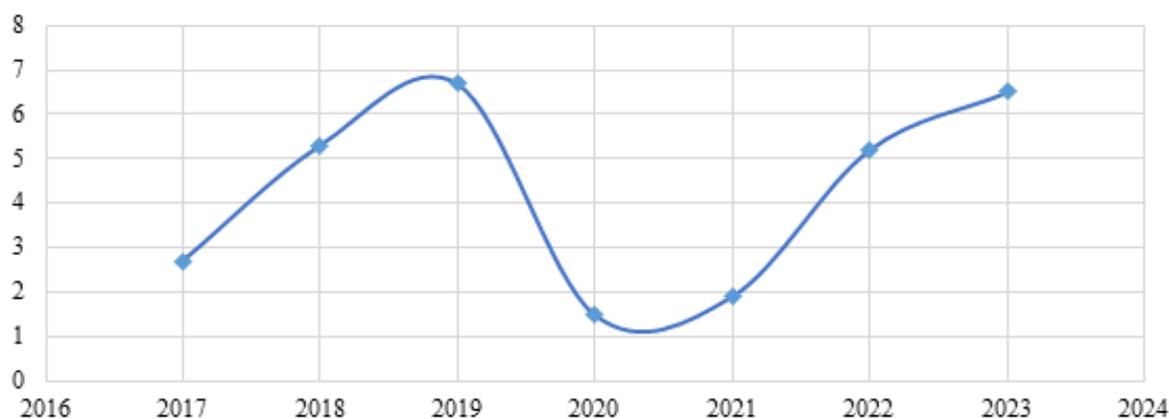


Figure 1. Dynamics of inbound tourism to Uzbekistan (2017-2023) [9]

Figure 1 shows dynamics of inbound tourism to Uzbekistan for the period from 2017 to 2023. It can be seen that during the given period the number of tourists to Uzbekistan has doubled.

Table 1 illustrates the results of the comparative analysis of touristic indicators across 6 countries. The comparative analysis of the state and development of the tourism industry in Uzbekistan and a number of countries with different tourism models – Kazakhstan, Georgia, Turkey, France and the United Arab Emirates – reveals both general trends and features of government policy, infrastructure development, branding and digitalization. In recent years, Uzbekistan has demonstrated steady dynamics in the development of tourism infrastructure, including the construction of hotels, the modernization of the transport network and the formation of tourist clusters. At the same time, the republic is still inferior to such countries as Turkey and the UAE in terms of the degree of integrated development of the sectoral infrastructure. Thus, Turkey served more than 49 million tourists in 2023 with revenues of over 55 billion US dollars, which is provided by a wide network of resorts, logistics hubs and travel services. The UAE demonstrates a model of state-of-the-art infrastructure, including luxury hotels, international hubs and theme parks [8]. In comparison, Kazakhstan and Georgia are also promoting diversified infrastructure with a focus on natural, medical, and wine tourism (table 1) [10, 12].

Table 1. Comparative analysis of tourism indicators (2023)

Country	Number of Tourists (mln)	Tourism Revenue (bln \$)	Contribution to GDP (%)	Digitalization Level	Main Type of Tourism
Uzbekistan	6,60	~2.0	~5	Medium	Cultural, pilgrimage
Kazakhstan	9,20	0.5	~3	Medium	Nature-based, event tourism
Georgia	4,70	~3	~7	High	Wine, gastronomic
Turkey	49.2	55.9	~11	High	Beach, cultural
France	79+	55	~8	Very high	Cultural, event-based, cycling
UAE	23–25	47	>12	Very high	Luxury, business, exotic

Table 2 illustrates the comparison of government measures to support tourism across six countries. The promotion of the tourist image is becoming increasingly important. Uzbekistan focuses on digital promotion and participation in international exhibitions, but the country's branding approach remains fragmented. In contrast, Turkey is implementing large-scale campaigns to create a sustainable brand through the national tourism agency. France, as part of the Explore France initiative, is developing the concepts of sustainable and slow tourism, focusing on regional diversity [11]. Georgia effectively uses the Explore Georgia brand and digital content marketing to create a unified visual and emotional image of the country. The UAE relies on unified branding through the Tourism Vision 2031 strategy, integrating cultural diversity into a single global image [8].

In Uzbekistan, the role of the state in the development of tourism is increasing: subsidies are provided to tour operators, infrastructure and marketing projects are being implemented, and measures to expand inbound



tourism are being funded. Kazakhstan and Georgia have similar measures in place, including tax incentives, cost compensation for tour operators, and promotion subsidies. Turkey combines government regulation with private investment, focusing on the development of domestic and international tourism. In the UAE and France, public policy is integrated into long-term national strategies aimed at sustainability, innovation and investment openness (table 2).

Table 2. Comparison of government measures to support tourism

Support Measure	Uzbekistan	Kazakhstan	Georgia	Turkey	France	UAE
Subsidies for tour operators	✓	✓	✓	✓	–	✓
Government investment programs	✓	✓	✓	✓	✓	✓
Tax incentives	–	✓	✓	✓	✓	✓
Target strategy until 2030	✓	✓	✓	✓	✓	✓

The level of digitalization in Uzbekistan is steadily developing: electronic visas, online booking, and national information portals are being introduced. However, compared to France, where more than a third of tourist transactions are carried out through mobile applications, and the UAE, where digital solutions cover the entire tourist's customer journey, Uzbekistan retains significant potential for technological growth. Electronic public services platforms and digital guides are actively developing in Kazakhstan and Turkey, while in Georgia digitalization is supported through mobile applications, navigation solutions and visual media formats.

CONCLUSION AND SUGGESTIONS

The analysis of the current state and comparative experience of tourism development in Uzbekistan demonstrates the presence of both significant potential and a set of systemic challenges hindering the sustainable growth of the industry. Despite the positive dynamics of the tourist flow and the growing interest in the country in the international arena, Uzbekistan is still lagging behind in a number of critical indicators, in particular, in terms of infrastructure maturity, digital transformation of tourism services and institutional marketing coordination.

Unlike countries such as Turkey, France or the UAE, where digital technologies cover the entire life cycle of a tourist – from route planning to post-trip assessment - in Uzbekistan, the introduction of digital solutions such as online services, intelligent recommendation platforms, systems for analyzing tourist behavior and integration with international platforms (Booking, TripAdvisor, etc.), is still of a limited nature [4, pp. 45-51]. This limits the opportunities to increase competitiveness in the global market.

In addition, the practice of unified branding, as implemented in Turkey through the TGA agency or in the UAE as part of the Tourism Vision 2031 strategy, requires further institutionalization in Uzbekistan. In the presence of a unique cultural and historical product (the Silk Road, Islamic heritage, gastronomy), the country's promotion on world markets remains fragmented and unsystematic, which reduces recognition and marketing effectiveness [1, pp. 60-65].

Government support for tourism in Uzbekistan demonstrates progressive features – subsidies to tour operators, investments in infrastructure, and the development of pilgrimage and domestic tourism. However, the task of building an effective model of public-private partnership and the transition from administrative regulation to stimulating innovative solutions and entrepreneurial initiatives in the field of tourism remains urgent [3, pp. 34-39].

An important point of growth for Uzbekistan is the introduction of sustainable tourism principles. International practice shows that the development of ecological, cultural and socially responsible tourism is not only consistent with the global agenda (SDGs, Paris Agreement), but also contributes to the diversification of national tourism supply. In this regard, it is necessary to develop a national strategy for sustainable tourism, taking into account regional characteristics and potential.

As a result of the analysis, it was found that the tourism industry of Uzbekistan is showing positive dynamics, relying on cultural heritage, government support and growing interest from the international community. However, in comparison with foreign countries, structural limitations have been identified in infrastructure, digitalization, and tourism brand promotion. For the sustainable development of tourism in Uzbekistan, an



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