



Article

Improving The Mechanisms for Forming and Developing Tourism Clusters on The Basis of Forecast Indicators for Tourism Development in The Republic of Uzbekistan

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Abstract: This article examines the issue of improving the mechanisms for the formation and development of tourism clusters based on the forecast indicators of tourism development in the Republic of Uzbekistan. The purpose of the study is to identify the institutional, infrastructural, digital, and investment mechanisms of cluster-based development on the basis of the existing regulatory framework in the tourism sector, official statistical indicators, and modern scientific approaches. The article analyzes the evolution of the tourism management system in Uzbekistan, tourist flows in 2024–2025, service exports, employment in tourism industries, and the share of tourism in GDP. As an original authorial approach, the study proposes a cluster model managed through territorial specialization, transport and logistics connectivity, a unified digital platform, a "final product chain," and forecast-based indicators. The research findings show that improving the efficiency of tourism clusters requires the introduction of territorial integration in a "center–satellite" format, a KPI system focused on tourist spending and length of stay, public-private partnership mechanisms, branding, and data-driven management tools.

Keywords: tourism, tourism cluster, forecast indicator, regional development, service exports, digitalization, destination management, Uzbekistan.

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1. Introduction

In recent years, the transformation of tourism into a strategic sector of the economy has become one of the priority areas of state policy in Uzbekistan. The institutional foundation of this process was laid by Presidential Decree No. 4861 of 2016, which initiated the creation of favorable conditions for the operation of tourism industry entities and set the objective of improving the legislative and institutional framework governing tourism activities. Presidential Resolution No. PQ-3217 of 2017, in turn, was aimed at activating tourism potential across the regions, with particular emphasis on accelerating the development of regional tourism in historical centers such as Samarkand. This stage highlighted the need to view tourism not merely as a separate service sector, but as a driver of regional economic growth [1].

On January 5, 2019, Presidential Decree No. 5611 approved the Concept for the Development of the Tourism Sector in the Republic of Uzbekistan for 2019–2025. This document identified the transformation of tourism into a strategic sector of the national economy, the diversification of tourism services, the improvement of service quality, the modernization of infrastructure, and the attraction of foreign investment as its principal objectives. Adopted on the same date, Presidential Resolution No. 4095 established a set of practical instruments through measures aimed at hotel construction, the

implementation of investment projects, and the introduction of modern information technologies into tourism facilities. Subsequently, the Law of the Republic of Uzbekistan No. O'RQ-549 "On Tourism" legally systematized this process by establishing a unified framework for regulating relations in the tourism sector, the tourism services market, and the protection of tourists' rights [2]. The development of tourism based on a modern cluster model requires not only infrastructure, but also an effective governance and data ecosystem. In this regard, the "Digital Uzbekistan – 2030" strategy laid the foundation for digital infrastructure, e-government, data exchange, and the platform economy [3].

In the Development Strategy of New Uzbekistan for 2022–2026, particular emphasis was placed on transforming tourism into a driver sector in selected regions, as well as on strengthening the integration of transport and service infrastructure. The reorganization of public administration in the fields of culture and tourism under Presidential Decree No. PF-114 of 2023 further expanded the possibility of implementing cluster policy through a unified coordination center. The "Uzbekistan – 2030" Strategy, adopted in 2023, established specific target indicators, including increasing the number of foreign tourists to 15 million, domestic tourists to 25 million, and pilgrimage tourists to 3 million. Presidential Decree No. PF-102 of 2024, in turn, provided for the creation of a national tourism brand and the strengthening of the country's image as a safe and attractive destination [4].

Thus, although a sufficiently robust regulatory and legal framework for tourism has been established in Uzbekistan, the key challenge now lies in moving from a mere "collection of tourism facilities" to an "integrated system of tourism clusters." In the classical sense, the cluster approach enhances productivity through close interaction among geographically concentrated actors, including suppliers and service providers, institutions, and innovation systems. Applied to tourism, this approach implies strengthening the interconnections within a destination among accommodation, transport, gastronomy, handicrafts, cultural heritage, events, digital services, and financial services [5].



Figure 1. Regulatory and Legal Foundations of Tourism Cluster Policy in Uzbekistan

In Uzbekistan, tourism clusters are often perceived merely as a collection of territorial facilities. However, within a cluster managed on the basis of forecast indicators, high value added cannot be generated unless demand, transport, accommodation capacity, service exports, employment, and digital visibility are interconnected. Therefore, the purpose of this article is to develop an original authorial approach to improving the mechanisms for the formation and development of tourism clusters on the basis of official forecast and practical indicators of tourism development [6].

2. Materials and Methods

The study employed institutional analysis, comparative analysis, statistical time-series analysis, normative-legal content analysis, indicator-based assessment, and an authorial forecasting approach. At the initial stage, in order to identify the institutional evolution of the tourism sector in Uzbekistan, presidential decrees, resolutions, laws, and strategic documents adopted during 2016–2024 were grouped according to their

substantive content. At the second stage, based on the data of the National Statistics Committee, the key indicators relating to tourist flows, service exports, employment in tourism industries, and the share of tourism in GDP were systematized. At the third stage, the local situation was compared with international approaches reflected in scholarly sources on cluster theory, destination management, sustainable tourism, and tourism demand forecasting [7]. At the fourth stage, an original cluster model was developed on the basis of the “target indicator–resource–territory–institution–result” chain. In the course of forecast assessment, the required average annual growth rate between the 2024 inbound tourism baseline and the target of 15 million tourists set out in the “Uzbekistan – 2030” Strategy was calculated. According to the estimate, achieving an increase from 7.957 million tourists in 2024 to 15 million tourists by 2030 requires an average annual growth rate of approximately 11.1 percent [7].

Within this methodology, cluster efficiency was assessed not solely by the number of tourists, but through five criteria: first, the growth of tourist flows; second, the expansion of accommodation capacity; third, service exports and value added; fourth, employment; and fifth, interregional connectivity and digital visibility. Therefore, the methodological novelty of the study lies in interpreting a tourism cluster not as a mere geographical aggregation, but as a multi-level service ecosystem managed on the basis of forecast indicators [8].

3. Results

According to official statistical data, the number of trips made by foreign citizens visiting Uzbekistan for tourism purposes reached 7,957.2 thousand in 2024, which was 20.1 percent higher than in 2023. In 2024, 90.3 percent of incoming tourists came from CIS countries, indicating that Uzbekistan’s tourism market remains strongly oriented toward geographically proximate market segments characterized by relatively low transport costs and short-term mobility. In January–March 2025, the number of tourist trips reached 2,102.4 thousand, representing a 38.4 percent increase compared to the same period in 2024. Such a rate indicates that the country’s tourism market has moved from the stage of recovery to the stage of growth. However, a substantial share of this increase is associated with the motive of “visiting relatives,” which points to the need to deepen the higher-spending leisure and recreational segment [9].

The composition of service exports also confirms the economic significance of tourism. In 2024, Uzbekistan’s total service exports amounted to USD 7.204 billion, of which 48.8 percent accounted for tourism. This means that the estimated volume of travel exports was around USD 3.52 billion. In 2025, total service exports rose to USD 9.760 billion, while the share of travel increased to 50 percent, implying that travel exports amounted to approximately USD 4.88 billion. Hence, the target of USD 5 billion in tourism service exports set out in the “Uzbekistan – 2030” Strategy has already come within very close reach, suggesting that the next stage of policy should shift from merely increasing the number of tourists to raising expenditure per tourist [10].

Employment in tourism industries reached 249,764 persons in 2024, which represents a significant increase compared to 215,679 persons in 2023. At the same time, the share of gross value added generated in tourism industries in the country’s GDP increased from 8.0 percent in 2019 to 9.2 percent in 2024. These two indicators demonstrate that tourism is strengthening within Uzbekistan’s economy not only as a service sector, but also as a source of employment and value added. The cluster approach is particularly important for accelerating these two indicators, since the greater the cooperation among services within a cluster, the higher the economic multiplier and the larger the share of income retained at the local level.

Table 1. Selected Key Indicators of Tourism in Uzbekistan

No	Indicator	2024	Analytical data	Result
1	Foreign tourist trips, thousand	7 957,2	Q1 2025: 2,102.4	Demand is increasing

№	Indicator	2024	Analytical data	Result
2	Growth rate in 2024	20,1%	38.4% in Q1 2025	Transition from recovery to the growth stage
3	Service exports, USD billion	7,204	9,760	Service exports have expanded
4	Share of travel	48,8%	50,0%	The share of tourism in exports has increased
5	Travel exports, USD billion	3,52	4,88	Approaching the USD 5 billion target
6	Employment in tourism industries	249 764	—	A driver of employment
7	Share of tourism in GDP	9,2%	—	Its macroeconomic role has strengthened

The main “growth signals” for tourism clusters include 7.96 million tourist trips in 2024, 2.10 million in the first quarter of 2025, travel exports of USD 3.52 billion in 2024, travel exports of USD 4.88 billion in 2025, employment of 249.8 thousand people, and a 9.2 percent share in GDP [11].

These dynamics indicate that, in Uzbekistan, tourism development should not be pursued merely through increasing the number of individual facilities, but rather through deepening tourism development in the form of territorial clusters. International experience likewise confirms that destination management, sustainability, governance, and the integration of infrastructure are decisive factors in tourism success. The World Economic Forum’s Travel & Tourism Development Index 2024 also identifies transport, infrastructure, service quality, sustainability, and institutional governance as the principal drivers of tourism development. OECD, in turn, emphasizes that tourism performance should be assessed not through isolated facilities, but through destination management and territorial cooperation [12].

According to M. Porter’s theory, clusters increase the productivity of firms, accelerate innovation, and stimulate the emergence of new businesses. Applied to tourism, this means that within macro-clusters such as the Samarkand–Bukhara–Shakhrisabz historical corridor, the handicraft and gastronomic corridor of the Fergana Valley, the Tashkent–Chimgan–Charvak recreational corridor, and the Khorezm–Karakalpakstan cultural-ecological corridor, hotels, guides, transport services, artisans, event operators, restaurants, fintech services, and online booking systems should function within a single ecosystem. Otherwise, even if tourist flows increase, value added will remain fragmented.

According to the author’s calculations, increasing tourist arrivals from 7.957 million trips in 2024 to 15 million trips by 2030 requires an average annual growth rate of 11.1 percent. Achieving such growth cannot be ensured solely through conventional advertising or visa simplification; rather, it requires increasing “cluster density.” By cluster density is meant the number of enterprises and services available per tourist, the degree of interconnection among them, the number of overnight stays within the route, and the extent to which local expenditure is retained. Therefore, the forecast indicator itself should become the principal benchmark of cluster policy.

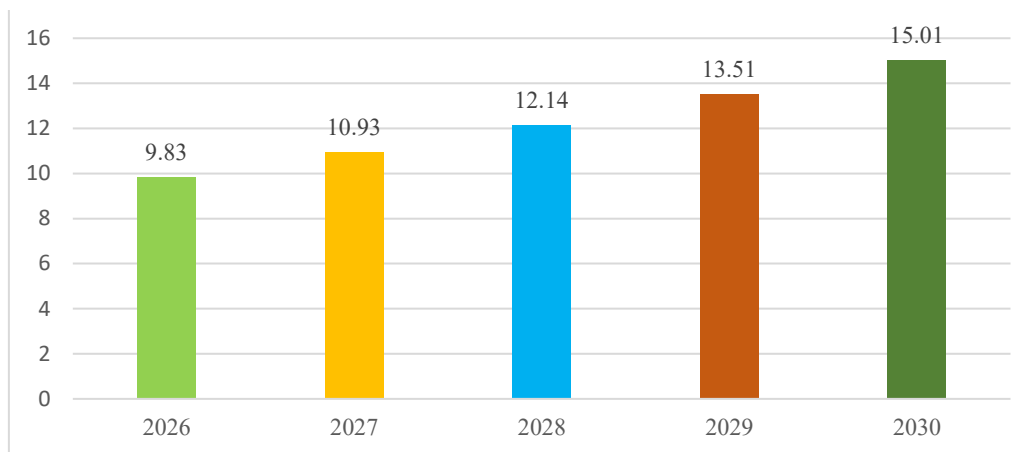


Figure 2. Trajectory for Achieving the Target of 15 Million Tourists by 2030

In the author's view, the current mechanism for forming tourism clusters in Uzbekistan is more focused on "creating individual facilities" than on "ecosystem governance." In other words, the construction of a hotel, the rehabilitation of a road, or the organization of an event does not in itself create a cluster. For a genuine cluster to function, at least five elements must operate simultaneously: a specialized territorial core, supporting services, a unified marketing brand, integrated logistics, and a common digital platform. For example, in the case of the Samarkand cluster, the main KPI should not be limited to the number of visitors alone, but should also include the average length of stay, expenditure per tourist, the number of visits to cultural sites, spending on gastronomic services, and the share of tourist flows redistributed to adjacent territories. The OECD approach to destination management likewise recommends precisely such an integrated model of governance and statistical monitoring [13].

Within the author's framework, a three-level cluster model is proposed for Uzbekistan. The first level comprises national macro-clusters: the "Silk Road Heritage Cluster," the "Pilgrimage Cluster," the "Eco and Mountain-Recreational Cluster," and the "Gastronomic and Handicraft Cluster." The second level includes territorial core clusters: Samarkand, Bukhara, Khiva, Tashkent–Bostanliq, the Fergana Valley, and Surkhandarya. The third level consists of micro-service clusters: handicraft quarters, gastronomic streets, thematic routes, and festival-service zones. Such a multi-tiered model deepens the tourism product package for different market segments and extends the duration of tourists' stay within a destination. This, in turn, increases service exports not through "more tourists," but through "higher spending and longer stays."

Moreover, current trends in the international tourism market point to the growing importance of digital visibility, data analytics, and sustainability criteria. According to UN Tourism, international tourism returned to its pre-pandemic level in 2024. This means that Uzbekistan should no longer be viewed as a "recovering market," but rather as a destination operating in an environment of intensified global competition. For this reason, the cluster mechanism should explicitly incorporate such parameters as ecological carrying capacity, pressure on cultural heritage, transport load, and the mitigation of seasonality.

The main forecast indicators for tourism development in the Republic of Uzbekistan are clearly defined in the "Uzbekistan – 2030" Strategy, according to which it is envisaged to increase the number of foreign tourists to 15 million, the number of domestic tourists to 25 million, tourism service exports to USD 5 billion, as well as the number of pilgrimage tourists to 3 million. These indicators are intended to transform tourism into one of the strategic drivers of the economy, promote the development of territorial tourism clusters, expand service infrastructure, and enhance the country's competitiveness in the international tourism market [14].

At the same time, the State Program for the implementation of the “Uzbekistan – 2030” Strategy in 2023 also established interim indicators for the tourism sector. In particular, it set the targets of increasing the number of foreign tourists to 10.0 million, domestic tourists to 20 million, tourism service exports to USD 2.0 billion, and the number of pilgrimage tourists to 1.2 million, as well as creating 30 large tourism clusters on the basis of cooperation among “hotels – transport – tour operators – trade and services. This demonstrates that the forecasts for tourism development are reinforced not only by final target indicators, but also by practical interim indicators to be implemented step by step.

Current statistical results also confirm that these forecast indicators are grounded in real trends. In particular, the number of trips made by foreign citizens visiting Uzbekistan for tourism purposes reached 7,957.2 thousand in 2024. Therefore, in order to achieve the target of 15 million by 2030, tourist flows will need to almost double. This, in turn, requires the formation of tourism clusters, the strengthening of transport and logistics connectivity, the expansion of accommodation capacity, the development of digital services, and an increase in average tourist expenditure [15].

4. Discussion

The results of this research indicate that a structural transformation stage in tourism development has occurred in Uzbekistan, which suggests the need for further quantitative and qualitative clustering of organization. Despite the positive dynamics of growth in tourist flows and exports of services, these indicators are not enough to ensure sustainable competitiveness in the global market for tourism products.

The findings are consistent with Porter’s cluster theory, which maintains that productivity and innovation improve through the geographic proximity and interaction of related businesses and institutions (Porter 1996; Rosenfeld 2002). In relation to tourism, this means that no part (hotels, transport or attractions) can create high value added alone without being controlled by a system according to what service ecosystem is created through some cooperation.

Additionally, it has been asserted in this research that the tourism clusters of Uzbekistan are still underway with its transitional phase characterized by a focus on building physical infrastructures instead of developing holistic destination management. This conclusion aligns with OECD methods that highlight the need for stakeholder coordination, digital integration, and governance based on evidence in the development of effective tourism.

Another relevant implication from the results is to move away from volume-based indicators (number of tourists) and towards value-based indicators (i.e., expenditure per tourist, length of stay and local retention of value). This mirrors broader trends in world tourism (Gonzalez and Marco, 2019), where competitiveness is becoming less about visitor numbers per se and more about the quality of the tourism product on offer.

Furthermore, the analysis also underscores the increasing role of digitalization and data analytics in the management of tourism clusters. Aspects such as digital platforms for booking, mobility and service delivery make the tourist experience more transparent, efficient and accessible.

In summary, results indicate that the formation of tourism clusters in the country greatly relies on institutional coordination improvement, rental density increase and holistic destination management. It is important to integrate the system of attractions, show it as a cluster and achieve long-term sustainability when increasing the competitiveness of a country in the international tourism market.

5. Conclusion

The findings of the study demonstrate that a solid regulatory and legal framework for tourism development has been established in Uzbekistan, while statistical indicators confirm that the sector has entered a trajectory of sustained growth. The fact that tourist trips reached 7.957 million in 2024, that the share of travel in service exports amounted to 48.8 percent, and that travel exports in 2025 approached USD 4.88 billion all indicate the high economic potential of tourism. However, in order to fully realize this potential, it is

necessary not merely to increase the number of tourism facilities, but to strengthen the coherence and integration of tourism clusters.

The first recommendation is that tourism clusters should be governed not through general territorial programs, but on the basis of targeted forecast indicators. For each cluster, a KPI passport should be developed, including tourist flows, length of stay, average expenditure, service exports, employment, and the share of digital bookings. The second recommendation is that cluster boundaries should be determined not according to administrative divisions, but on the basis of tourist routes and economic interdependence. The third recommendation, proceeding from the logic of Presidential Decrees No. PF-6079 and No. PF-102, is the introduction of a unified digital destination platform for all clusters, integrating booking, ticketing, guiding, transport, payment, and analytics modules into a single system.

The fourth recommendation is that investment policy in tourism should extend beyond hotel construction to include gastronomy, the events industry, handicrafts, cultural content, transport services, wellness, and recreational services. The fifth recommendation is the introduction of a cooperative mechanism based on the “center–satellite” model, enabling tourist flows to be distributed from major historical cities to adjacent territories. The sixth recommendation is that, in evaluating cluster efficiency, the principal performance indicator should not be limited to the number of tourists, but should also include the value added generated per tourist. Only through such an approach can Uzbekistan transform tourism from a simple market of visits into a high-income, sustainable, and competitive ecosystem of services.

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