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# Comparative Analysis of Tourism Competitiveness in Uzbekistan and Kazakhstan: Case Studies Across Macro, Meso, and Micro Levels

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**Abstract:** This article presents a comparative analysis of tourism competitiveness in Uzbekistan and Kazakhstan, structured across the macro, meso, and micro levels of an integrated assessment framework developed in the author's prior research. At the macro level, the two countries' positions in the World Economic Forum's Travel & Tourism Development Index (TTDI) 2024 are compared (Uzbekistan 78th, Kazakhstan 52nd of 119 economies), alongside national tourism-policy instruments such as visa liberalization and strategic growth targets. At the meso level, regional cluster cases are examined — Uzbekistan's Samarkand–Bukhara–Khiva Silk Road heritage corridor and Kazakhstan's Oi-Qaragai ski cluster in Almaty Region — applying Porter's cluster theory. At the micro level, enterprise- and operator-level indicators are compared, including the author's own KOKTP/TKKBK calculator methodology and Kazakhstan's accommodation-sector statistics, alongside a bilateral case — the Jibek Joly cross-border tourist train connecting Almaty, Turkistan, and Tashkent — illustrating that regional cooperation can enhance competitiveness for both countries rather than functioning as a zero-sum contest. The findings suggest complementary strengths: Kazakhstan leads in absolute macro-level positioning and large-scale cluster investment, while Uzbekistan shows the faster relative improvement trajectory and a denser concentration of UNESCO heritage assets.

**Keywords:** tourism competitiveness, Uzbekistan, Kazakhstan, TTDI, comparative case study, cluster theory, macro-meso-micro framework, Central Asia

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## 1. Introduction

Central Asia has emerged as one of the fastest-growing tourism regions in the world over the 2023–2025 period. Both Uzbekistan and Kazakhstan — the two largest tourism economies in the region — have recorded substantial growth in foreign arrivals, expanded visa-free regimes, and adopted ambitious national strategies, yet they occupy markedly different positions in international competitiveness rankings and have built their respective tourism sectors around different resource bases: Uzbekistan around a dense concentration of UNESCO World Heritage Silk Road cities, and Kazakhstan around vast natural landscapes and large-scale infrastructure investment in and around Almaty and Astana [1], [2], [3].

Despite this shared regional context, comparative academic analysis of the two countries' tourism competitiveness — disaggregated across macro (national policy), meso (regional/cluster), and micro (enterprise/operator) levels — remains limited. Most existing assessments rely on a single aggregate international index, which obscures the level-specific mechanisms through which each country builds competitive advantage. This

article addresses that gap by applying an integrated three-level competitiveness framework, developed in the author's broader dissertation research, to a structured comparison of concrete cases from each country at each level [4], [5], [6].

The aim of this study is to compare the tourism competitiveness of Uzbekistan and Kazakhstan across macro, meso, and micro levels using verified statistical data and representative case studies, and to identify lessons each country's experience offers the other. The objectives are: (1) to compare the two countries' macro-level positioning using the WEF TTDI and national policy instruments; (2) to examine meso-level regional cluster cases through the lens of Porter's cluster theory; (3) to compare micro-level enterprise and operator indicators, including a bilateral cross-border case; and (4) to formulate policy recommendations grounded in the comparative findings [7].

#### Literature Review

The theoretical foundation of destination competitiveness research rests on several complementary streams. Ritchie and Crouch's Destination Competitiveness Model (1999, 2003) and Dwyer and Kim's Integrated Model of Destination Competitiveness (2003) both frame competitiveness as a function of endowed and created resources, destination management, situational conditions, and demand. At the national level, Porter's diamond model (1990) and subsequent cluster theory (1998) explain competitiveness through factor conditions, demand conditions, related industries, and firm strategy, with geographically concentrated clusters of related firms and institutions amplifying productivity and innovation. Krugman's (1994) critique cautions against treating countries as if they competed like firms, yet acknowledges that national policy and infrastructure shape the conditions under which firms compete internationally – a tension that is directly relevant to comparing Uzbekistan and Kazakhstan, where national-level policy (visa regimes, strategic targets) interacts with firm- and cluster-level outcomes [8], [9].

At the operational level, the World Economic Forum's Travel & Tourism Development Index (TTDI), now in its second (2024) edition covering 119 economies, provides the most widely used cross-country benchmark, structured around enabling environment, T&T policy and enabling conditions, infrastructure and services, and travel and tourism resources. Within Central Asia specifically, prior research by Tukhliev, Tukhliev and Pardaev has examined Uzbekistan's tourism potential and investment attraction, while Kazakhstan's tourism development has been documented primarily through industry and government reporting (Kazakh Tourism National Company; Bureau of National Statistics of Kazakhstan) rather than peer-reviewed comparative academic studies. The absence of disaggregated macro–meso–micro comparative analysis between the two countries, despite their shared regional context and intersecting tourism corridors, motivates the comparative case-study approach adopted in this article [10], [11], [12].

## 2. Materials and Methods

This study applies a comparative case-study design structured around the three-level (macro, meso, micro) competitiveness framework developed in the author's broader dissertation research. Data sources include the WEF Travel & Tourism Development Index 2024 report, official statistics from Uzbekistan's State Statistics Committee and Kazakhstan's Bureau of National Statistics, national strategic policy documents (Uzbekistan's "Tourism-2040" strategy; Kazakhstan's 2029 tourism targets), and verified industry and government reporting on specific cluster and infrastructure projects [13], [14].

At the macro level, comparison relies on internationally verified TTDI rankings and scores together with national policy indicators (visa liberalization, strategic targets). At the meso level, two representative regional cluster cases – one per country – are compared using Porter's cluster-theory lens, supplemented, for Uzbekistan, by the author's own regional competitiveness index (MTRI) data, which is presented as the author's primary research finding requiring further independent verification rather than as an externally audited statistic. At the micro level, enterprise- and operator-level indicators are compared, including the author's own KOKTP/TKKBK enterprise-

assessment methodology (also presented with the same caveat) and Kazakhstan's officially reported accommodation-sector statistics, together with a single bilateral case – the Jibek Joly cross-border tourist train – illustrating cooperative rather than purely competitive dynamics between the two countries [15], [16].

### 3. Results and Discussion

Macro level: national policy and the WEF TTDI

Table 1 summarizes the macro-level comparison. Kazakhstan ranks 52nd of 119 economies in the WEF TTDI 2024 (score 4.07), having climbed six places since the 2019 baseline (58th), and is the regional leader within Central Asia. Uzbekistan ranks 78th, an improvement of sixteen places from its 2019 baseline of 94th – a relative gain more than twice the size of Kazakhstan's, even though Uzbekistan's absolute position remains lower. The World Economic Forum identifies Uzbekistan among the ten most-improved economies globally between 2019 and 2024, while no equivalent distinction was identified for Kazakhstan in available sources, suggesting that the two countries are at different points on a convergence trajectory: Kazakhstan started from, and remains at, a higher absolute base, while Uzbekistan is closing the gap at a faster relative rate.

Table 1. Macro-level comparison: Uzbekistan and Kazakhstan

Indicator	Uzbekistan	Kazakhstan
WEF TTDI 2024 rank (of 119 economies)	78th	52nd
WEF TTDI rank, 2019 baseline	94th	58th (per WEF, –6 places to 2024)
TTDI 2024 score (1–7 scale)	not disclosed in available public sources	4.07
Position within Central Asia	2nd (after Kazakhstan)	1st (regional leader)
Foreign tourist arrivals, 2024	8.2 million	≈15.3 million (10.4 million overnight; some sources cite 11.5 million)
Foreign tourist arrivals, H1 2025	5.3 million (+111% y-o-y)	7.5 million (5.0 million overnight)
Visa liberalization	90+ visa-free countries; 56 e-visa countries	83 visa-free countries (target: 100)
National strategy target	“Tourism-2040”: 11 million tourists, USD 3.8 billion revenue by 2025	15 million visitors, EUR 10 billion revenue by 2029

Source: compiled by the author from WEF TTDI 2024; Astana Times (2025); Qazinform (2024); Travel And Tour World (2024–2025); Travel Tomorrow (2025); Uzbekistan State Statistics Committee (2025).

Both countries report similar policy instruments – visa liberalization and quantified medium-term strategic targets – but at different absolute scales: Uzbekistan's tourist-arrival figures (8.2 million in 2024) remain below Kazakhstan's reported figures (variously cited as 11.5 to 15.3 million depending on methodology and the inclusion of short-stay or transit visitors), even though Uzbekistan's percentage growth rate in 2025 (+47% full-year; +111% in H1) considerably exceeds Kazakhstan's. This pattern – a smaller but faster-growing base – is consistent with Uzbekistan's larger relative improvement in the TTDI ranking.

Meso level: regional cluster cases

At the meso level, both countries have concentrated recent investment in geographically defined tourism clusters, consistent with Porter's (1998) cluster theory. Kazakhstan's Oi-Qaragai ski cluster in Almaty Region represents a USD 150 million investment targeting more than 1,200 new jobs by the end of 2025, complementing Almaty Region's broader 2024 performance — a 19% increase in visitor numbers and a record 1.6 million tourists, driven by natural attractions including the Kolsai Lakes, Charyn Canyon, and the Shymbulak ski resort. Astana's parallel Tourism District project, a 194 billion tenge ( $\approx$ USD 368.6 million) investment expected to create 2,000 jobs, illustrates a second, urban-infrastructure variant of the same cluster-development logic.

Table 2. Meso-level cluster cases: Samarkand–Bukhara–Khiva corridor vs. Almaty Region

Dimension	Uzbekistan: Samarkand–Bukhara–Khiva corridor	Kazakhstan: Almaty region
Theoretical framing	Porter cluster theory (1998) applied to a UNESCO heritage corridor	Porter cluster theory (1998) applied to an alpine/ski tourism cluster
Flagship project	Boutique-hotel and heritage-infrastructure investment in historic mahallas (Samarkand, Bukhara, Khiva)	Oi-Qaragai ski cluster
Investment / scale	Part of national infrastructure programme (not separately quantified in available sources)	USD 150 million; 1,200+ jobs targeted by end-2025
2024 visitor dynamics	Regional MTRI resource-base score 0.92 — highest among six surveyed regions (author's own research, requires further verification)	Almaty Region: +19% visitors; record 1.6 million tourists (2024)

Source: compiled by the author from Astana Times (2025); Business Year (2025); and the author's own MTRI regional assessment (primary research finding, requires further independent verification).

Uzbekistan's principal meso-level case is the Samarkand–Bukhara–Khiva Silk Road heritage corridor, where the author's own regional competitiveness index (MTRI) assigns Samarkand region the highest resource-base score (0.92) among six surveyed Uzbek regions — a finding consistent with, though not a substitute for, its UNESCO World Heritage status. Unlike Kazakhstan's cluster cases, which are anchored in single, large, separately quantified infrastructure investments, Uzbekistan's corridor strategy is distributed across multiple historic cities and financed through a broader national infrastructure programme — boutique-hotel development in historic mahallas, multilingual audio-guide systems, and QR-code heritage signage — rather than one flagship project. This points to a structural difference in cluster-development models: concentrated mega-investment (Kazakhstan) versus distributed heritage-corridor development (Uzbekistan), both consistent with cluster theory but differing in execution. Micro level: enterprise and operator cases, including a bilateral case

Table 3. Micro-level enterprise and operator comparison

Indicator	Uzbekistan	Kazakhstan
Micro-level assessment instrument	KOKTP/TKKKBK enterprise calculator: 5 modules (hotels, tour operators, restaurants, transport, other), 4 AHP-weighted indicators each (author's own methodology)	No equivalent composite calculator identified in available sources; sector tracked via official

		accommodation-revenue statistics
Accommodation-sector growth, 2024	Not separately quantified in available sources	+27% revenue y-o-y (≈224 billion tenge)
National promotion body	State Committee for Tourism Development	“Kazakh Tourism” National Company JSC
Bilateral micro-level case	Jibek Joly tourist train: Almaty → Turkistan → Tashkent — a joint cross-border operational product	

Source: compiled by the author from Astana Times (2025); Kazakh Tourism National Company (qaztourism.kz); and the author's own KOKTP/TKKKBK methodology (primary research finding, requires further independent verification).

At the enterprise level, the two countries are currently tracked through different instruments: Uzbekistan through the author's own composite KOKTP/TKKKBK calculator (covering hotels, tour operators, restaurants, transport, and other enterprises via four AHP-weighted indicators per module), and Kazakhstan primarily through official sector-level revenue statistics, which recorded 27% accommodation-revenue growth in 2024 (approximately 224 billion tenge). The most instructive micro-level case, however, is bilateral rather than national: the Jibek Joly tourist train, which began service in Almaty, called at Turkistan, and concluded in Tashkent. This joint cross-border product demonstrates that enterprise- and operator-level competitiveness need not be framed as a zero-sum contest between the two countries — a shared regional product can simultaneously raise the competitive standing of both, by extending each country's tourism offer with the other's complementary attractions (Kazakhstan's steppe and heritage sites at Turkistan; Uzbekistan's Silk Road cities) [17].

#### 4. Conclusion

This comparative analysis indicates that Uzbekistan and Kazakhstan exhibit complementary rather than directly substitutable competitive profiles. At the macro level, Kazakhstan holds a higher absolute TTDI position, while Uzbekistan demonstrates a markedly faster relative improvement trajectory. At the meso level, Kazakhstan favors concentrated, large-scale cluster investment (ski tourism, urban tourism districts), while Uzbekistan favors distributed heritage-corridor development across multiple UNESCO cities. At the micro level, the two countries currently rely on different assessment instruments, but their most significant joint opportunity lies in cross-border cooperative products such as the Jibek Joly train, which expand the addressable market for both rather than dividing a fixed one.

Based on these findings, the following recommendations are proposed: (1) Uzbekistan should consider Kazakhstan's experience with large-scale, separately financed flagship cluster projects (e.g., the Oi-Qaragai model) as a complement to its distributed heritage-corridor approach; (2) Kazakhstan could draw on Uzbekistan's UNESCO-anchored heritage-corridor model when developing cultural (as opposed to natural-landscape) tourism products; (3) both countries should expand joint cross-border tourism products following the Jibek Joly precedent, given evidence that regional cooperation can raise competitiveness for both partners simultaneously; (4) a harmonized regional micro-level enterprise-assessment instrument — building on Uzbekistan's KOKTP/TKKKBK methodology — could usefully be piloted in both countries to enable direct enterprise-level comparison, which is currently not possible given the differing data infrastructures; and (5) future research should extend this comparison to Kyrgyzstan and Tajikistan to construct a complete regional competitiveness map of Central Asia across all three levels of the framework.

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