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Tourism Cluster Development As A Mechanism for Enhancing Destination Competitiveness: The Experience of Uzbekistan

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Abstract: This article examines tourism cluster development as a strategic mechanism for enhancing the competitiveness of tourism destinations, with particular reference to Uzbekistan. Building on Porter's (1990, 1998) cluster and diamond-of-competitiveness theory, the "coopetition" principle of Brandenburger and Nalebuff (1996), and the destination management organization (DMO) concept of Buhalis (2000), the study develops a six-stage cluster-formation methodology and applies it to five geographically and thematically distinct tourism clusters identified across Uzbekistan: the Great Silk Road cluster (Tashkent–Samarkand–Bukhara–Khiva), the Fergana Valley handicraft and agritourism cluster, the Aral Sea ecological cluster, the Chimgan–Charvak mountain-sports cluster, and the Termez ancient-civilizations cluster. For each cluster the analysis identifies a unique selling proposition, core attractions, dominant tourism typology, and quantitative development targets for 2023–2030. The study further analyzes financial mechanisms for cluster development (tax incentives, subsidized lending, public-private partnership), the role of destination management systems (DMS) in coordinating multi-stakeholder clusters, and the empirical relationship between multi-destination routing and visitor dwell time and expenditure. The findings indicate that the cluster approach, properly sequenced and institutionally supported by an empowered DMO, can raise average visitor dwell time from the current 5.2 days toward an 8–10 day target by 2030 and is projected to nearly double total inbound tourist flow, from 6.8 million in 2023 to 13.8 million in 2030. The article concludes with policy recommendations for sequencing cluster investment, structuring PPP risk allocation, and managing carrying capacity through smart-tourism monitoring technology.

Keywords: tourism cluster; destination competitiveness; Porter's diamond model; coopetition; destination management organization; public-private partnership; dwell time; Uzbekistan

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1. Introduction

The competitiveness of a tourism destination is increasingly understood not as a property of individual firms or even individual attractions, but as an emergent outcome of the spatial and institutional organization of interdependent tourism enterprises and supporting industries. This insight, transplanted into tourism research from industrial-organization economics, underlies the growing scholarly and policy interest in tourism clusters — geographically concentrated groups of tourism enterprises, suppliers, and associated institutions that compete with one another while simultaneously cooperating on shared infrastructure, marketing, and quality standards [1], [2]. For transition and developing economies seeking to accelerate tourism-sector growth without the fiscal capacity to develop every destination simultaneously, the cluster approach offers a way of sequencing investment: concentrating scarce public resources on a limited number of geographically coherent destination clusters, each built around a distinctive core

attraction and a clearly articulated unique selling proposition (USP), rather than dispersing investment uniformly across the national territory.

Uzbekistan presents an instructive case for this approach. The country possesses an unusually wide range of tourism resource types – UNESCO World Heritage cultural sites along the historic Silk Road, traditional handicraft and agricultural landscapes in the Fergana Valley, a globally recognized ecological disaster site at the former Aral Sea, mountain terrain suitable for ski and adventure tourism near Tashkent, and ancient Buddhist, Greco-Bactrian, and Kushan civilizational heritage in the south of the country around Termez – yet inbound tourism remains heavily concentrated on the classical Silk Road corridor, which alone accounted for 59 percent of all visitors in 2023. The national “Tourism-2040” strategy [3] explicitly identifies cluster-based regional diversification as a policy priority, but the academic literature has not yet systematically mapped Uzbekistan's emerging tourism clusters against established cluster-competitiveness theory, nor quantified the financial mechanisms and dwell-time effects that would be required to make such diversification credible.

This study addresses that gap. Its purpose is threefold: first, to apply Porter's cluster and diamond-of-competitiveness framework, together with the coopetition and DMO concepts, to the identification and characterization of Uzbekistan's principal tourism clusters; second, to formalize a replicable, stage-based methodology for cluster formation suitable for a transition-economy context; and third, to evaluate the financial-mechanism and institutional-coordination requirements – public-private partnership structuring, destination management systems, multi-route product design, and carrying-capacity management – needed to convert the cluster concept into measurable gains in visitor dwell time, tourism revenue, and total inbound flow by 2030.

Literature Review

Cluster theory and the diamond model of competitiveness

The theoretical foundation of cluster-based competitiveness analysis is Porter's (1990) diamond model, which explains national and regional competitive advantage as the joint product of four interacting determinants: factor conditions, demand conditions, related and supporting industries, and firm strategy, structure, and rivalry [4]. Porter (1998) subsequently extended this framework explicitly to clusters – geographically proximate groups of interconnected companies and associated institutions in a particular field – arguing that clustering intensifies all four diamond determinants simultaneously by concentrating specialized factor inputs [1], sophisticated local demand, dense supplier networks, and competitive rivalry within a bounded area. Applied to tourism, the cluster lens reframes a destination not as a single product but as a portfolio of complementary, geographically concentrated attractions, accommodation, transport, and ancillary services whose joint marketing and quality coordination determines the destination's overall competitive position [5], [6].

Coopetition and destination management organizations

A central analytical puzzle in cluster theory is that firms within a cluster are simultaneously rivals for individual customers and partners in producing the shared public goods – destination image, infrastructure, environmental quality – on which their collective competitiveness depends. Brandenburger and Nalebuff (1996) formalized this dual relationship as “coopetition,” providing the conceptual basis for understanding why competing hotels, tour operators, and craft producers within a tourism cluster have a rational incentive to cooperate on destination branding, joint marketing, and shared quality standards even as they compete vigorously for individual bookings. Operationalizing coopetition in practice requires a coordinating institution: Buhalis (2000) identifies the destination management organization (DMO) as the institutional mechanism through which cluster-level coordination, branding [7], and stakeholder governance are achieved, and presents evidence that an effectively functioning DMO can raise overall destination competitiveness by 30–40 percent relative to an uncoordinated destination with comparable resource endowments. Ritchie and Crouch [8] and Dwyer and Kim [9] similarly assign destination management and policy a central, rather than peripheral, role in their respective integrated models of destination competitiveness,

treating it as the dimension through which raw resource endowments are converted into realized visitor value.

Financing mechanisms, multi-destination routing, and visitor dwell time

Because tourism clusters typically require simultaneous investment in transport connectivity, accommodation capacity, and shared visitor infrastructure that exceeds what any single private actor would undertake unilaterally, the cluster-development literature pays close attention to financing structure. Hodge and Greve (2007), in a review of public-private partnership (PPP) experience across infrastructure sectors, emphasize that the appropriate allocation of risk between public and private partners – rather than the mere presence of private capital – is the decisive determinant of PPP success, a finding directly applicable to tourism cluster infrastructure, where demand risk, construction risk, and regulatory risk each call for a different allocation. A second strand of empirical literature documents the demand-side payoff of successful cluster coordination: research summarized by UNWTO (2019) and consistent with Porter's (1998) original clustering logic finds that tourists visiting multiple linked destinations within a coordinated multi-route product stay 40–60 percent longer and spend 35–50 percent more than tourists confined to a single destination, because complementary attractions extend the logical itinerary length without requiring the visitor to incur a new long-haul trip. International experience reinforces this point: the Catalonia tourism cluster, coordinated through a PPP-based governance model since the 1990s, today attracts approximately 20 million visitors annually, while the Tuscany agritourism cluster generates over four billion euro in regional GDP and accounts for roughly 30 percent of Italy's rural tourism revenue – both cases illustrating that sustained multi-decade institutional coordination, not natural endowment alone, underlies high cluster-level competitiveness.

Table 1 summarizes the principal theoretical and empirical contributions underlying the cluster-formation framework applied in this study.

Table 1
Comparative Summary of Selected Studies on Cluster Theory and Destination Competitiveness

Author(s), Year	Focus	Method	Key Finding
Porter (1990)	Diamond model of national/regional competitiveness	Conceptual model	Competitiveness arises from factor, demand, industry, and rivalry conditions interacting jointly
Porter (1998)	Cluster theory	Conceptual analysis	Geographic clustering intensifies all four diamond determinants simultaneously
Brandenburger & Nalebuff (1996)	Coopetition	Conceptual/game-theoretic model	Rival firms have rational incentives to cooperate on shared public goods
Buhalis (2000)	Destination management organizations	Theoretical analysis	Effective DMO governance can raise destination competitiveness by 30–40%
Ritchie & Crouch (2003)	Integrated destination	Conceptual model	Destination management converts resource

	competitiveness model		endowments into realized competitiveness
Dwyer & Kim (2003)	Destination competitiveness determinants	Conceptual/indicator model	Management and situational conditions mediate resource-based advantage
Hodge & Greve (2007)	Public-private partnership performance	Comparative policy review	Risk allocation, not capital source, determines PPP outcomes
UNWTO (2019)	Multi-destination routing and visitor behavior	Empirical/statistical review	Linked-route tourists stay 40–60% longer and spend 35–50% more
Mazanec et al. (2007)	Destination competitiveness measurement	Methodological review	Cluster-level coordination is a measurable competitiveness determinant

Source: compiled by the author based on the literature reviewed above.

Taken together, this literature suggests that tourism cluster competitiveness is jointly determined by (1) the underlying diversity and quality of resource endowments across the diamond's four determinants, (2) the presence of an institutional mechanism — typically a DMO — capable of converting rival firms' cooperative incentives into coordinated destination-level action, and (3) a financing structure that allocates infrastructure risk appropriately between public and private partners. The methodology developed in Section 3 operationalizes these three conditions into a replicable sequence of cluster-formation stages.

2. Materials and Methods

This study employs a qualitative, theory-driven case-mapping design combined with secondary statistical analysis. Uzbekistan's emerging tourism clusters were identified and characterized through a six-stage methodology synthesized from the cluster-formation literature reviewed in Section 2:

Stage 1 — Regional potential assessment: an inventory of natural, cultural, and infrastructural resource endowments by region, following Porter's (1990) factor-conditions logic.

Stage 2 — Identification of the cluster core: selection of the dominant anchor attraction(s) capable of generating an independent visitor flow sufficient to support complementary enterprises.

Stage 3 — Identification of cluster participants: mapping of accommodation, transport, food-service, craft, and guiding enterprises within the functional catchment area of the cluster core.

Stage 4 — Establishment of a destination management organization: creation or designation of a coordinating body responsible for joint branding, quality standards, and stakeholder governance, consistent with Buhalis (2000).

Stage 5 — Design of financial mechanisms: structuring of tax incentives, subsidized credit lines, and public-private partnership arrangements to fund shared infrastructure, informed by the risk-allocation principles of Hodge and Greve (2007).

Stage 6 — Marketing and branding strategy: formulation of a cluster-level unique selling proposition (USP) and integration into national and international tourism promotion.

The five clusters analyzed in Section 4 were identified by applying Stages 1–2 of this methodology to official tourism-arrival statistics, heritage-site inventories, and the

resource classification used in Uzbekistan's national "Tourism-2040" strategy. Quantitative cluster-level data for 2023 (actual visitor flow) and 2030 (target visitor flow) draw on the State Statistics Committee's tourism reporting and on planning targets contained in national strategy documents. Dwell-time and PPP-financing analysis in Sections 4 and 5 draws on UNWTO (2019) cross-country evidence and on the international comparator cases (Catalonia, Tuscany) identified in Section 2.3 [10].

3. Results and Discussion

Overview of Uzbekistan's five tourism clusters

Applying the regional-potential and cluster-core identification stages of the methodology to Uzbekistan's resource base yields five geographically and thematically distinct tourism clusters, summarized in Table 2.

Table 2
Uzbekistan's Principal Tourism Clusters and Their Development Potential, 2023–2030

Cluster	Core Attractions	Dominant Tourism Type	2023 Visitors	2030 Target
Great Silk Road	Registan (Samarkand), historic Bukhara, Ichan-Qala (Khiva)	Cultural-historical, MICE	4.2 million	7.5 million
Fergana Valley	Rishtan ceramics, Margilan silk weaving, Kokand Khan's Palace	Agritourism, handicrafts	0.8 million	2.0 million
Aral Sea ecological	Moynaq ship graveyard, former seabed, salt desert	Ecological, educational	0.1 million	0.5 million
Chimgan-Charvak	Amirsoy resort, Chimgan, Charvak reservoir	Mountain-sports, recreation	1.5 million	3.0 million
Termez civilizations	Fayoztepa, Dalverzintepa, Termez Archaeology Museum	Heritage, archaeological	0.2 million	0.8 million

Source: compiled by the author based on State Statistics Committee tourism data and the national "Tourism-2040" strategy (Decree of the President of the Republic of Uzbekistan, 2023).

Across all five clusters, the aggregate target trajectory implies growth in total inbound tourist flow from 6.8 million in 2023 to 13.8 million by 2030 — a doubling that cannot be achieved through continued concentration on the Great Silk Road corridor alone, since that cluster's own 2030 target (7.5 million) already approaches practical carrying-capacity limits at sites such as Registan and Ichan-Qala. The remaining four clusters are therefore not merely supplementary; they are structurally necessary to the national 2030 target.

Cluster profiles

Great Silk Road cluster. With a unique selling proposition framed as the "cultural heart of Central Asia," this cluster spans the Tashkent–Samarkand–Bukhara–Khiva corridor and already accounts for 59 percent of Uzbekistan's total inbound visitors, anchored by four UNESCO World Heritage properties (Registan, Shahi-Zinda, and Gur-Emir in Samarkand; the historic centre of Bukhara; and Ichan-Qala in Khiva). Development priorities identified for this cluster include upgrading service quality and the stock of four- and five-star hotel capacity, improving inter-city transport links, expanding visitor centers, and growing the supply of national-cuisine restaurants; planned technological investments include virtual- and augmented-reality interpretive experiences at heritage sites and a "Smart Guide" mobile application.

Fergana Valley cluster. Branded around the USP “valley of silk and handicrafts,” this cluster centers on Rishtan ceramics, Margilan silk weaving, and the urban heritage of Namangan, Andijan, and Kokand (including the Kokand Khan's Palace). Proposed signature products include a “Silk Weaver's Route,” a “Ceramic Art Tour,” and an “Agritourism Journey,” with the cluster's positioning explicitly modeled on the agritourism branding strategies of Tuscany, Provence, and Catalonia — informally described in cluster-planning discussions as an aspiration to become “Uzbekistan's Tuscany.”

Aral Sea ecological cluster. Framed around the USP “ecological lesson and revival,” this cluster monetizes the global visibility of the Aral Sea environmental disaster through a dark-tourism positioning analogous to Chernobyl, centered on a proposed “Aral Sea — Ecological Lesson Museum” complex near Moynaq, complemented by Karakalpakstan folk-art, music, and heritage programming. Although its current and targeted visitor volumes are the smallest of the five clusters, its educational and international-visibility value is disproportionate to its scale.

Chimgan–Charvak mountain-sports cluster. Positioned as “Central Asia's mountain-sports hub” and located only 1.5–2 hours from Tashkent, this cluster is anchored by the Amirsoy and Chimgan ski resorts and is being actively diversified beyond winter sports into weekend tourism, corporate events and team-building, summer trekking, mountain biking, and paragliding; water sports on the Charvak reservoir — kayaking, windsurfing, and boating — are identified as a mechanism for extending the cluster's appeal across additional seasons of the year.

Termez ancient-civilizations cluster. Framed as a “treasury of ancient civilizations” and marketed under a “heritage tourism” positioning, this cluster draws on Buddhist, Greco-Bactrian, Kushan, and Sogdian archaeological heritage, centered on the Termez Archaeology Museum and the Fayoztepa and Dalverzintepa sites, complemented by Sherabad and Boysun ethnographic traditions — Boysun culture itself being inscribed on the UNESCO Intangible Cultural Heritage list [11], [12].

International comparators and dwell-time implications

Table 3 situates Uzbekistan's emerging cluster system against two long-established international comparators discussed in Section 2.3, illustrating both the scale of coordinated cluster tourism achievable under mature governance and the multi-decade time horizon typically required to reach it.

Table 3
Uzbekistan's Cluster Trajectory Against International Comparators

Cluster/Region	Governance Model	Approx. Scale	Maturity
Catalonia (Spain)	PPP-based regional DMO since the 1990s	~20 million visitors/year	30+ years
Tuscany (Italy)	Agritourism cluster association	€4+ billion regional GDP; ~30% of Italy's rural tourism	Decades
Uzbekistan (aggregate, 2023)	Emerging cluster framework; national strategy adopted 2023	6.8 million total inbound visitors	Early stage
Uzbekistan (aggregate, 2030 target)	Five-cluster DMO/PPP framework (proposed)	13.8 million total inbound visitors (target)	7-year horizon

Source: compiled by the author from UNWTO (2019) and the comparator cases discussed in Section 2.3.

The comparison underscores that Uzbekistan's seven-year target horizon (2023–2030) is considerably more compressed than the multi-decade development paths of Catalonia

and Tuscany, implying that institutional coordination – DMO establishment, PPP risk allocation, and multi-route product design – will need to substitute for the slow organic maturation that characterized the comparator cases. The current national average visitor dwell time of 5.2 days, against a 2030 target of 8–10 days, is the single statistic most directly diagnostic of whether this substitution is succeeding: because dwell time responds to multi-destination routing more than to single-site investment, it is treated in Section 5 as the principal intermediate indicator of cluster-policy effectiveness.

Discussion and Policy Implications

Financial mechanisms for cluster development

Translating the five cluster profiles into realized investment requires a financing architecture suited to each cluster's risk profile. Table 4 summarizes the principal financial instruments under consideration.

Table 4
Financial Mechanisms for Tourism Cluster Development in Uzbekistan

Instrument	Description	Primary Risk Allocated To
Corporate tax holidays	5–10 year exemptions for qualifying tourism enterprises within designated clusters	Public sector (foregone revenue)
Subsidized lending	3–5% interest loans via the Uzbekistan Tourism Development Fund	Public sector (interest-rate subsidy)
State infrastructure subsidies	Direct funding of roads, utilities, and general-purpose visitor infrastructure	Public sector
Innovation grants	Competitive grants for tourism technology and product-development projects	Shared (public funding, private execution)
Public-private partnership (PPP)	Private capital for accommodation, attractions, and visitor facilities under negotiated concession terms	Shared, per Hodge & Greve (2007) risk-allocation principles

Source: compiled by the author based on national tourism-financing policy and Hodge and Greve (2007).

Consistent with Hodge and Greve's (2007) central finding, the appropriate sequencing of these instruments matters more than their aggregate volume: tax holidays and infrastructure subsidies are best directed at the lower-volume, higher-risk clusters (Aral Sea, Termez) where private capital alone would not internalize the educational and heritage externalities involved, while PPP concessions are best reserved for the higher-volume, more commercially proven clusters (Great Silk Road, Chimgan–Charvak) where private operators can reasonably price demand risk [13], [14].

Destination management systems and multi-route product design

Coopetition among cluster participants, in the sense of Brandenburger and Nalebuff (1996), requires a digital coordination layer in addition to formal DMO governance. Destination management systems (DMS) – integrated digital platforms supporting online booking, dynamic pricing, and real-time visitor-flow and expenditure data – are identified as the principal technological mechanism for operationalizing coopetition at scale, allowing individually competing accommodation and tour-operator businesses to participate in joint cluster-level marketing and capacity-management decisions without surrendering commercial autonomy. Three multi-route products are proposed for cross-cluster integration: a “Silk Road–Valley–Mountains” triangle package linking the Great Silk Road, Fergana Valley, and Chimgan–Charvak clusters; a “Samarkand–Bukhara–Khiva–Termez” square route extending the classical Silk Road itinerary southward into

the Termez cluster; and a “Tashkent–Chimgan–Fergana” weekly itinerary aimed at the shorter-duration regional and business-travel segment. Each of these routes is designed specifically to exploit the dwell-time and expenditure premium documented by UNWTO (2019) for multi-destination travel.

Carrying capacity and the social dimension of cluster development

The concentration of visitor growth implied by Table 2 — particularly the Great Silk Road cluster's approach toward practical capacity limits at flagship heritage sites — raises a carrying-capacity management problem that smart-tourism technology is well positioned to address. Sensor-based visitor counting, AI-assisted flow monitoring, and dynamic pricing, of the kind already adopted in cities such as Barcelona, Amsterdam, and Dublin, are identified as adaptable models for managing visitor density at Registan, Shahi-Zinda, and Ichan-Qala without imposing hard caps on overall cluster growth.

Finally, cluster development carries a social and employment dimension that strengthens its policy case beyond pure competitiveness metrics. UNWTO data indicate that tourism job creation requires roughly 1.5 times less capital investment per job than alternative sectors, making the four lower-density clusters (Fergana Valley, Aral Sea, Chimgan–Charvak, Termez) attractive instruments for rural employment generation and as a partial counterweight to urban migration pressure — an objective distinct from, but complementary to, the competitiveness rationale that motivates the cluster framework overall [15], [16], [17], [18], [19], [20], [21].

4. Conclusion

This study has applied Porter's (1990, 1998) cluster and diamond-of-competitiveness theory, the co-competition principle of Brandenburger and Nalebuff (1996), and the destination management organization concept of Buhalis (2000) to map and characterize five emerging tourism clusters in Uzbekistan: the Great Silk Road, Fergana Valley, Aral Sea, Chimgan–Charvak, and Termez clusters. A six-stage cluster-formation methodology — spanning regional potential assessment, cluster-core identification, participant mapping, DMO establishment, financial-mechanism design, and marketing strategy — was used to organize the empirical analysis.

Three conclusions follow. First, continued concentration on the Great Silk Road corridor alone is structurally insufficient to meet Uzbekistan's 2030 inbound-tourism target of 13.8 million visitors, given that this single cluster's own growth ceiling is approached well before that target is reached; diversification into the remaining four clusters is therefore a quantitative necessity, not merely a qualitative preference. Second, the financing architecture required differs systematically by cluster: lower-volume, higher-externality clusters (Aral Sea, Termez) warrant public-instrument-led financing, while higher-volume, commercially proven clusters (Great Silk Road, Chimgan–Charvak) are better suited to PPP-based private capital, consistent with Hodge and Greve's (2007) risk-allocation logic. Third, the national dwell-time target (8–10 days by 2030, against a current 5.2 days) is best understood as the key intermediate indicator of cluster-policy success, since dwell time is the variable most directly responsive to the multi-route product integration and DMS-enabled co-competition mechanisms proposed in Section 5.

Policy recommendations include sequencing public investment toward the four secondary clusters ahead of further Great Silk Road expansion; establishing legally empowered, adequately resourced DMOs for each cluster as a precondition for PPP tendering; deploying DMS platforms to support joint marketing and dynamic capacity management; piloting sensor-based carrying-capacity monitoring at the most visited heritage sites; and integrating the proposed multi-route products into the national tourism platform scheduled for 2026 launch. Future research should empirically test the dwell-time and expenditure effects of the proposed multi-route products once implemented, and should extend the cluster-mapping methodology applied here to other transition economies seeking to diversify tourism beyond a single dominant corridor.

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