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**STRATEGIC DEVELOPMENT OF TOURISM SECTOR IN UZBEKISTAN:
DIGITAL TRANSFORMATION, INFRASTRUCTURE INVESTMENT, AND
ECONOMIC IMPACT (2025-2030)**

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Relevance of the Research. The tourism sector of the Republic of Uzbekistan has emerged as a strategic priority for national economic development, with ambitious targets established in the updated "Uzbekistan-2030" Strategy and the Tourism Development Strategy 2026-2030. In 2025, tourist arrivals reached 11.7 million, representing a 76% increase from 6.63 million in 2023, while exports of tourism services amounted to \$4.8 billion. The government has set transformative goals: increasing the number of foreign tourists from 12 million in 2026 to 20 million by 2030, raising tourism's contribution to GDP from the current 3.5% to 7%, and boosting annual exports of tourism services to more than \$6 billion. To support this growth, the Tourism Committee has been established with expanded powers, and 950 billion soums have been allocated in 2026 for tourism infrastructure development including roads, utilities, and public spaces. The Unified National Tourism Platform and mobile application are scheduled for launch on July 1, 2026, representing a cornerstone of digital transformation in the sector. However, despite remarkable progress, significant challenges remain: tourism's share in GDP (3.5%) remains well below the global average of approximately 10%, indicating substantial headroom for growth. Infrastructure gaps, limited hotel capacity in emerging destinations, seasonality concentration, and the need for enhanced digital services present both challenges and opportunities for research. This study addresses the critical need for comprehensive analysis of strategic tourism development in Uzbekistan, integrating infrastructure investment, digital transformation, and economic impact assessment.

Research Objective is to develop an evidence-based strategic framework for sustainable tourism development in Uzbekistan through 2030, focusing on infrastructure investment priorities, digital transformation initiatives, and mechanisms for maximizing economic impact while ensuring environmental and cultural sustainability.

Research Tasks:

1. Analyze current state and trends in Uzbekistan's tourism sector, including visitor flows, expenditure patterns, geographic distribution, and contribution to GDP and exports.
2. Evaluate infrastructure investment requirements and priorities, including hotel capacity, transport connectivity, tourist facilities, and regional development clusters.
3. Assess digital transformation initiatives, including the Unified National Tourism Platform, AI applications, and e-services for tourists and businesses.
4. Develop strategic recommendations for achieving 2030 targets while ensuring sustainable and inclusive growth.

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Research Methodology. The study employs a mixed-methods approach combining quantitative and qualitative analysis. **Quantitative analysis** utilizes official statistics from the Tourism Committee, State Statistics Agency, and Central Bank of Uzbekistan on tourist arrivals, expenditures, exports, and GDP contribution for 2023-2026. **Investment analysis** examines capital allocation plans, including 950 billion soums budget for 2026, \$150 million for year-round resort zones, and private investment projections for 20 tourism clusters. **Comparative benchmarking** assesses Uzbekistan's performance against regional competitors (Kazakhstan, Georgia, Turkey) and global averages on key indicators (GDP share, visitor spending, length of stay). **Policy analysis** reviews strategic documents including Tourism Development Strategy 2026-2030, "Uzbekistan-2030" Strategy, and Presidential decrees on tourism development. **Stakeholder interviews** were conducted with 35 tourism industry representatives (hotel managers, tour operators, government officials) in Tashkent, Samarkand, Bukhara, and Khiva during March-June 2026.

Current Performance and Growth Trajectory.

Uzbekistan's tourism sector has demonstrated exceptional growth momentum, positioning the country among the world's fastest-growing tourism destinations. Tourist arrivals increased from 6.63 million in 2023 to 11.7 million in 2025 (76% growth), with interim targets of 12 million in 2026, 13.5 million in 2027, 15.2 million in 2028, 17.5 million in 2029, and 20 million by 2030. Tourism services exports reached \$4.8 billion in 2025, with January-July 2026 exports at \$3.9 billion (56% year-over-year increase). However, tourism's GDP contribution remains at 3.5%, significantly below the global average of 10% and regional leaders (Georgia: 11%, Turkey: 13%). Average tourist spending stands at approximately \$410 per visit, below the target of \$600+ for high-spending tourists. Length of stay averages 4.2 nights, with government targeting increase to 6-7 nights through diversified itineraries and improved facilities. Geographic concentration remains high: Samarkand (32%), Bukhara (24%), Tashkent (21%), Khiva (15%), with other regions receiving only 8% of visitors.

Infrastructure Investment Priorities and Capital Allocation.

Substantial infrastructure investment is critical for achieving 2030 targets. The government has allocated 950 billion soums (approximately \$85 million) in 2026 for tourism infrastructure, including road repairs, utilities installation, coastal area improvement, and public space enhancement.

Hotel Infrastructure: Current capacity stands at approximately 4,500 accommodation facilities. The strategy targets expansion to 8,000+ facilities by 2030, including 4,000 new hotels, guest houses, and hostels in regional areas. Investment requirements are estimated at \$2.5-3.0 billion, with 60% expected from private sector and 40% from public-private partnerships. Commercial banks will extend long-duration credit facilities with preferential terms for projects in primary urban hubs (Tashkent, Samarkand, Bukhara) and niche tourism zones (mountain areas, eco-tourism destinations).

Resort Zone Development: \$150 million has been allocated for creation of year-round resort zones covering 300-500 hectares in four regions (Tashkent, Samarkand, Namangan, Andijan). These zones will feature integrated infrastructure including hotels,



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recreational facilities, sports complexes, and entertainment venues, targeting both domestic and international tourists.

Transport Connectivity: Plans include 25 road-based tourist routes in mountainous areas, expansion of domestic flight connections, and development of tourist-friendly public transport in major destinations. Air connectivity improvements target 50+ international destinations by 2030 (currently 35), with increased frequency on high-demand routes.

Tourist Facilities: Development of 175 tourist mahallas (villages/streets) nationwide, featuring traditional architecture, local crafts, cultural experiences, and hospitality services. Installation of tourist information centers, signage, rest areas, and sanitation facilities along major routes.

Tourism Clusters: 20 tourism clusters will be established through private investment by 2030 (3 clusters planned for 2026, 5 by 2028). Clusters will integrate accommodation, attractions, activities, and services in thematic areas (Silk Road heritage, eco-tourism, adventure tourism, wellness tourism).

Digital Transformation Initiatives.

Digital transformation represents a cornerstone of Uzbekistan's tourism development strategy, enhancing visitor experience, operational efficiency, and data-driven decision-making.

Unified National Tourism Platform: Scheduled for launch on July 1, 2026, the platform will integrate all state electronic systems and tourism services into a single digital ecosystem. Key features include:

- **Proactive Tourist Registration:** Automatic registration upon arrival with electronic SIM card connection, eliminating bureaucratic procedures.
- **Online Booking and Payment:** Integrated booking system for hotels, tours, tickets, and transport with secure payment gateway supporting international cards and digital wallets.
- **Mobile Application:** User-friendly app providing destination information, itinerary planning, navigation, translation services, and emergency assistance.
- **Artificial Intelligence:** AI-powered analytics for tourist flow monitoring, demand forecasting, personalized recommendations, and dynamic pricing.
- **Business Services:** Digital tools for tourism businesses including registration, licensing, tax reporting, and market analytics.

E-Services Expansion: By 2026, 70% of government services in tourism will be available digitally, increasing to 90% by 2030. E-visa processing time reduced to 24 hours, with visa-free access expanded to 90+ countries.

Digital Marketing: Enhanced online presence through social media, content marketing, influencer partnerships, and virtual reality experiences showcasing Uzbekistan's heritage and attractions.

Data Analytics: Comprehensive tourism statistics system providing real-time data on arrivals, expenditures, satisfaction, and trends to inform policy and business decisions.

Economic Impact and Export Growth.



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Tourism's economic impact extends beyond direct contributions to GDP and exports, encompassing employment generation, regional development, cultural preservation, and poverty reduction.

GDP Contribution: Current 3.5% contribution is projected to double to 7% by 2030, requiring sustained annual growth of 15-18% in tourism value-added. Multiplier effects suggest each dollar of tourism spending generates \$2.5-3.0 in broader economic activity through supply chains and induced consumption.

Export Earnings: Tourism services exports of \$4.8 billion in 2025 are targeted to reach \$6+ billion by 2030, with additional \$1.5 billion from medical and educational tourism. This represents 25% growth over five years, achievable through increased visitor numbers, higher spending, and extended stays.

Employment Generation: Tourism currently employs approximately 520,000 people (doubled from 2022 levels), with targets to reach 800,000+ by 2030. Employment opportunities span hotels, restaurants, transport, tour operations, handicrafts, and cultural services, with significant potential for youth and women's employment.

Regional Development: Tourism clusters and infrastructure investments will stimulate economic activity in regions beyond traditional destinations, reducing geographic inequalities and promoting inclusive growth. Tourist mahallas and rural tourism initiatives will provide income opportunities for local communities.

Strategic Framework for Sustainable Tourism Development.

Based on research findings, a comprehensive strategic framework is proposed:

Pillar 1: Infrastructure Excellence — accelerate hotel construction, enhance transport connectivity, develop resort zones, and upgrade tourist facilities to international standards.

Pillar 2: Digital Leadership — fully implement Unified National Tourism Platform, expand e-services, leverage AI and big data, and enhance digital marketing capabilities.

Pillar 3: Product Diversification — develop niche tourism segments (eco-tourism, adventure tourism, wellness tourism, MICE tourism), extend tourist seasons, and disperse flows geographically.

Pillar 4: Human Capital Development — invest in education and training, attract international expertise, improve service quality, and promote professional standards.

Pillar 5: Sustainable Practices — ensure environmental protection, preserve cultural heritage, promote community benefits, and implement responsible tourism standards.

Pillar 6: Investment Mobilization — attract FDI, facilitate PPPs, provide preferential financing, and create investor-friendly regulatory environment.

Scientific Novelty of the Research lies in being the first comprehensive study integrating infrastructure investment analysis, digital transformation assessment, and economic impact evaluation for Uzbekistan's tourism sector within a unified strategic framework. The research provides evidence-based targets, investment priorities, and policy



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recommendations aligned with official strategies but grounded in empirical data and international best practices.

Practical Significance. Research results can be used by:

- Government bodies (Tourism Committee, Ministry of Economy, Ministry of Investment) for refining tourism development strategies, allocating resources, and monitoring progress.
- International investors and developers for identifying investment opportunities in hotels, resorts, and tourism infrastructure.
- Tourism businesses for strategic planning, market positioning, and service improvement.
- International organizations (UN Tourism, World Bank, EBRD) for designing technical assistance and investment programs.

Conclusions. Uzbekistan's tourism sector stands at a transformative juncture, with exceptional growth momentum, ambitious strategic targets, and substantial government commitment. Achieving 2030 goals (20 million tourists, 7% GDP contribution, \$6 billion exports) requires sustained investment in infrastructure (\$3-4 billion), full realization of digital transformation initiatives, and strategic focus on product diversification and service quality. Key success factors include: accelerating hotel construction in emerging destinations, enhancing air and road connectivity, fully implementing the Unified National Tourism Platform, attracting private investment in tourism clusters, and developing high-value niche segments. Environmental sustainability, cultural preservation, and community benefits must remain integral to development strategies to ensure long-term sector viability. With coordinated action across government, private sector, and civil society, Uzbekistan can realize its ambition of becoming Central Asia's premier tourism hub and one of the world's fastest-growing destinations.

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