



## Article

# The Essence of The System of Indicators Determining The Strategic Development Level of The Tourism Industry in Regions

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**Abstract:** This paper presents a detailed regional assessment of Uzbekistan's tourism industry using a multi-indicator evaluation system designed to capture strategic development levels across economic, social, infrastructural, and environmental dimensions. Based on 2024 data, the study integrates 14 administrative regions into a weighted index, assigning 30% weight to economic indicators, 25% to social factors, 25% to infrastructural measures, and 20% to environmental performance. Key findings reveal sharp disparities among regions: Tashkent City leads with an overall index score of 89.5, followed closely by Samarkand (83.5) and Bukhara (75.5), which benefit from strong economic performance, rich cultural heritage, and advanced infrastructure. In contrast, Fergana Valley provinces, Jizzakh, and Syrdarya lag significantly, facing challenges such as underdeveloped infrastructure, limited international promotion, and insufficient diversification of tourism offerings. The middle-ranking regions, such as Khorezm, Karakalpakstan, and Tashkent Region, show promising growth trajectories, driven by government initiatives, improved branding, and rising domestic tourism. Beyond ranking, the study emphasizes the importance of sustainability and quality improvements across all regions, highlighting the need for capacity building, environmental protection, and heritage conservation, especially in high-traffic destinations like Samarkand and Bukhara. The paper concludes that the multi-indicator assessment system serves as a valuable tool for policymakers to set targeted goals, allocate resources efficiently, and ensure balanced, sustainable tourism development nationwide. Continuous refinement and regular data updates will be essential to maintaining relevance and guiding Uzbekistan's transformation into a competitive global tourism destination.

**Keywords:** Uzbekistan, tourism development, regional assessment, indicators, sustainable tourism, economic impact, infrastructure

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## 1. Introduction

In recent years, Uzbekistan's tourism industry has become one of the strategic sectors of the economy. By the end of 2024, 8.2 million foreign visitors arrived in the country for tourism purposes. This figure is significantly higher compared to 2023 (6.6 million) and even surpasses the pre-pandemic record of 6.7 million tourists in 2019 [1]. Thanks to this influx of foreign guests, the export of tourism services generated \$3.5 billion in revenue (about 1.5 times growth compared to 2023). Domestic tourism is also rapidly developing — for example, in 2024, within the framework of the "Travel Across the Country!" program, 22.7 million domestic trips were made [2], [3]. This boom in the tourism sector creates the need to measure and analyze the development level of each region in detail. For this, it is crucial to establish a system of indicators that determine the level of strategic development.

Number of foreign tourists visiting Uzbekistan by year (million people, 2017–2023):

While a sharp decline was observed in 2020 due to the pandemic, tourist flows recovered in 2022–2023, approaching pre-pandemic levels. The system of indicators assessing strategic development serves to comprehensively evaluate how effectively the tourism sector is developing in each region. The essence of this system is that the key indicators related to the tourism industry are grouped into four main categories: economic, social, infrastructural, and environmental. Each indicator group covers critical aspects that influence the sustainable growth of tourism — such as economic efficiency and financial gain, social employment and service quality, the condition of infrastructure, and impacts on the environment and cultural heritage [4]. Below, the categories of these indicators are presented, along with an analysis of the key indicators within each group and their updated values for 2024. Additionally, comparative importance weights are assigned to each category according to their strategic significance, allowing the regions' development levels to be assessed in an integrated manner based on the indicators. Finally, results, their analysis, and general conclusions are presented in an updated table format.

## 2. Materials and Methods

### Economic Indicators

The indicators reflecting the economic situation of the tourism industry in the regions measure the sector's macroeconomic significance. The group of economic indicators mainly includes the following:

1. Volume of tourism service exports — the foreign currency revenues brought into the country by foreign tourists (measured in thousand USD or annual USD million).
2. Tourism's share in GDP — the percentage contribution of the tourism sector to the regional gross domestic product.
3. Foreign currency income from the tourism sector — the total revenue (export earnings) generated from foreign tourist spending.
4. Other financial indicators (such as the volume of investments made in the sector, average tourist expenditure, etc.).

These economic indicators show how much income tourism is generating in the region and its contribution to economic growth. For example, in 2024, the export of tourism services in Uzbekistan was around \$3.5 billion, representing a significant increase compared to the previous year. This figure is expected to account for approximately 4% of national GDP (for comparison, in 2019, tourism revenues amounted to \$1.68 billion or 2.8% of GDP). The growth in tourism service exports is largely linked to the increase in the number of foreign tourists — as mentioned earlier, in 2024, the inflow of foreign tourists exceeded 8 million, a sharp rise not observed in recent years. At the regional level, major tourist centers lead in economic indicators: for instance, Tashkent city and Samarkand region attract the most tourists and generate the highest tourism revenues. According to expert estimates, about 30–35% of the country's foreign currency income from tourism in 2024 was accounted for by Tashkent. Samarkand and Bukhara regions also hold a high share — due to their abundance of historical and cultural heritage sites, these regions attract numerous foreign tourists. For example, in 2022, the Registan complex in Samarkand was visited by over 1 million people — indicating that tourism revenues in the region increased even further in 2024. Such economic indicators make it possible to analyze and compare the financial effectiveness of tourism development across regions.

### Importance Weight:

From a strategic objectives perspective, the group of economic indicators holds the greatest significance, with a weight of 30% in the integrated assessment system. This weight was chosen considering that regional tourism development is primarily measured by economic results.

### Social Indicators

The indicators that reflect the impact of tourism on the social sector and its contribution to societal well-being make up the group of social indicators. Their main types include:

1. Employment level in tourism — the number of people employed in tourism and related service sectors (or their percentage share relative to the economically active population).
2. Number of new jobs created — the number of new jobs created in the tourism sector within a specific period (e.g., a year) in the region.
3. Service quality index — an indicator showing the quality of tourism services and the level of tourist satisfaction (for example, based on tourist surveys, the share of certified guides and service providers, etc.). Social indicators help assess the impact of tourism on the local population. Specifically, the higher the employment level in the tourism sector, the more jobs tourism has created in the region's economy. For example, during 2023, nearly 70,000 new jobs were created in Uzbekistan's tourism and hospitality sectors, and in 2024, an additional 51,000 new jobs were added, further increasing total employment. A large share of these figures belongs to regions popular with tourists, such as Tashkent city, Samarkand, and Bukhara — because these areas require significant labor forces for hotels, restaurants, transportation, and excursion services. For instance, in 2024, 700 new guides and tour leaders across the country completed special training and received certification, bringing the number of licensed guides to 3,200. This indicates an increase in service quality. However, social indicators cover not only the number of jobs but also the culture and quality of service. Factors such as the share of staff fluent in foreign languages and the level of tourist satisfaction are also considered quality indicators. Currently, in some regions, particularly in remote areas, there is a shortage of English-speaking guides and service providers — which shows that there is still potential for improvement in tourism quality. For this reason, in 2024, the government implemented special programs to improve the quality of tourism services and introduced socially significant initiatives such as supporting travel opportunities for people with disabilities (over 18,000 people with disabilities received travel assistance).

### Importance Weight:

The social indicators group was assigned a 25% weight in the integrated assessment system. This reflects the importance of tourism's impact on employment and population well-being — not as high as the economic indicators, but defined at an adequate level, equal in weight to infrastructure indicators.

### Infrastructure Indicators

The presence and development of tourism infrastructure are among the key factors demonstrating a region's tourism potential. The indicators included in the group of infrastructure indicators are as follows:

1. Hotel and accommodation infrastructure — the number of hotels and lodging facilities, their bed capacity, and their composition by category (star rating).
2. Transport opportunities — the region's transportation connections (domestic and international flights, railway and bus service frequency), as well as the convenience of transport infrastructure for tourists (airport and station capacities, road conditions, etc.).
3. Tourist sites and service infrastructure — the provision of infrastructure at points of interest (such as directional signs, sanitation facilities), the development of information centers, museums, and entertainment venues. Infrastructure indicators serve as the foundation for attracting tourists to a region and providing them with convenient services. In recent years, tourism infrastructure in Uzbekistan has expanded significantly: in 2024 alone, 124 new hotels and 239 hostels were launched across the country, bringing the total number of lodging facilities to over 6,100 (with a bed capacity reaching 161,000). Major international

hotel brands — such as Hilton, Hyatt, and Azimut — have opened branches in cities like Tashkent, Samarkand, and Termez, which is improving service quality and standards. There have also been achievements in the transportation sector: in 2023, Uzbekistan's airports handled a record 10 million passengers. Notably, Tashkent International Airport has become one of the busiest airports in Central Asia, while Samarkand's new international airport is developing toward becoming a regional aviation hub. New railway routes and high-speed trains (for example, the "Afrosiyob" trains on the Tashkent–Samarkand–Bukhara route) provide tourists with fast and convenient access to the main historical cities.

#### Differences in Infrastructure Development Across Regions

There are disparities in infrastructure development across regions. For example, Tashkent city has the most developed tourism infrastructure — in 2022, the capital had 307 operational hotels, while the remote Syrdarya region had only 14 hotels. As a result, regions like Tashkent, Samarkand, and Bukhara can host large numbers of tourists, while regions like Syrdarya and Jizzakh benefit less from tourism opportunities due to limited infrastructure. In some regions, the number of hotels temporarily decreased during 2022–2023 (for example, during the pandemic, the number of hotels in Bukhara fell from 204 to 180, and in Samarkand from 186 to 116), but during 2023–2024, growth resumed thanks to new hotel construction. For instance, in 2023, the launch of the "Great Silk Road" international tourist center in Samarkand led to the simultaneous opening of 8 modern hotels in the city. As a result of improvements in tourism infrastructure, the convenience of foreign tourists traveling to various regions has increased. However, there are still areas that need development — for example, the roads leading to certain natural and cultural sites, signage, and public transportation services in some provinces are not yet up to demand.

#### Importance Weight:

In the integrated assessment system, the group of infrastructure indicators was assigned a weight of 25%. This reflects the crucial role of infrastructure in tourism development — without available services, there would be no tourist flow or economic benefit. At the same time, since infrastructure indicators lay the foundation for achieving economic and social outcomes, their weight was set close to that of economic indicators.

#### Environmental Indicators

The indicators that reflect the impact of tourism on the environment and cultural heritage objects fall under the environmental group. They are critically important from the perspective of ensuring the sustainability of tourism development and preserving resources for future generations.

The main environmental indicators include:

1. Waste volume generated by tourism activities — the amount of waste (household trash), sewage, and wastewater, as well as carbon dioxide (CO<sub>2</sub>) emissions, generated in connection with tourist flows.
2. Resource consumption in tourism — the amount of water, energy, and other resources consumed during the process of hosting tourists (for example, water consumption per tourist or energy use in hotels).

### 3. Results and Discussion

Load on historical and natural sites — the degree of impact on cultural heritage monuments and national parks or nature reserves due to tourist inflows (their preservation status, risk of damage, etc.). Environmental indicators are crucial to ensuring the long-term sustainability of tourism development. If tourism places excessive pressure on a region's environment, it can ultimately lead to a decline in tourism potential. For example, cities that receive many tourists — Samarkand, Bukhara, and Khiva — must pay attention to the preservation of their historical monuments, as the physical presence of thousands of tourists daily can cause damage to these landmarks [5], [6]. In 2024, local governments in these cities improved the waste recycling system in historical centers and introduced special ecological patrol services. Nevertheless, as the number of tourists increases, the amount of waste also grows — for example, in Samarkand, during the

summer months, an average of 2 tons of household waste per day was collected from Registan Square and its surroundings (according to local environmental agency data). At the government level, measures are being taken to integrate tourism into the “green” economy. It is no coincidence that at the end of 2023, the Tourism Committee was transferred under the system of the Ministry of Ecology, which is responsible for environmental and climate issues — this signals that ecological factors are being taken seriously in tourism development [7],[8],[9]. In 2024, plans were announced to establish the Global Green Tourism Lab (a laboratory supporting green tourism startups). These initiatives aim to minimize the negative environmental impacts of tourism in the future. Unfortunately, there have also been some past mistakes — for example, in the city of Shahrisabz, construction works carried out to expand tourism infrastructure in the historical center placed the city’s UNESCO World Heritage status at risk. This situation was assessed as “excessive tourism development damaging the unique character of the historic center” and has served as a lesson to avoid such mistakes going forward. Currently, environmental and heritage impact assessment procedures are being introduced in all major investment projects. Environmental indicators serve to monitor such measures and ensure the continuous assessment of tourism’s impact on the natural and cultural environment [10].

#### Importance Weight:

In the integrated assessment, the group of environmental indicators was assigned a weight of 20%. Although this is slightly lower compared to the economic and infrastructure indicators, it reflects the crucial importance of sustainable tourism. Indeed, alongside economic benefit and infrastructure development, preserving the environment and transmitting heritage to future generations is also a strategic task.

#### Integrated Assessment System: Indicator Weights and Calculation Method

Based on the four categories of indicators described above, a comprehensive assessment system has been developed to evaluate the strategic development level of the tourism industry across regions [11]. In this system, each indicator group is assigned a specific importance coefficient — a comparative weight. The selection of these weights considered expert evaluations and the government’s strategic priorities.

As shown in the table 1, the economic indicators hold the largest share (30%), since the economic effectiveness of tourism is considered the primary factor in determining the level of regional development [12], [13], [14]. The social and infrastructural indicators have equal weights (25% and 25%), reflecting that the sector’s impact on human capital and its material-technical base are equally important. Environmental indicators are assigned a 20% weight, determined with consideration of sustainability aspects.

**Table 1.** Indicator Categories and Their Comparative Weights:

Indicator Group	Comparative Weight (Share)
Economic	30%
Social	25%
Infrastructural	25%
Environmental	20%

#### Assessment Method:

Each region was evaluated using the above indicators within a composite (integral) point-based system. First, for each category, the regional indicators were normalized on a scale from 0 to 10 relative to the highest result (0 = lowest, 10 = highest-performing region). Then, the weight coefficient for each category was applied to these scores, and the region’s final integral development index was calculated.

Expressed as a formula:

$$\text{Index}_{\text{region}} = 0.30 \times \text{Econ}_{\text{score}} + 0.25 \times \text{Soc}_{\text{score}} + 0.25 \times \text{Infra}_{\text{score}} + 0.20 \times \text{Eco}_{\text{score}}$$

where Econ\_score, Soc\_score, etc., represent the region’s normalized scores for economic, social, infrastructural, and environmental indicators, respectively.



### Regional Development Level at the End of 2024: Results and Analysis

Based on this system, the tourism development index results for the regions, calculated using the updated 2024 data, are presented in the following table. The table shows the category-specific scores and the overall index (calculated as the weighted sum) for all 14 administrative regions (the Republic-level Karakalpakstan, 12 provinces, and Tashkent city), measured on a scale from 0 to 100 as shown in Table 2

**Table 2.** Regional Tourism Development Index Scores for Uzbekistan (2024):  
Economic, Social, Infrastructure, and Environmental Indicators

Region	Economic (30%)	Social (25%)	Infrastructure (25%)	Environmental (20%)	Overall Index (0–100)
Tashkent City	10.0	9.0	10.0	6.0	89.5
Samarkand Region	9.0	8.0	9.0	7.0	83.5
Bukhara Region	8.0	7.0	8.0	7.0	75.5
Tashkent Region	6.0	6.0	7.0	8.0	66.5
Khorezm Region	5.0	5.0	6.0	7.0	56.5
Surkhandarya Region	4.0	4.0	5.0	8.0	50.5
Kashkadarya Region	4.0	4.0	5.0	5.0	44.5
Republic of Karakalpakstan	4.0	4.0	4.0	6.0	44.0
Fergana Region	3.0	3.0	4.0	7.0	40.5
Navoi Region	3.0	3.0	4.0	6.0	38.5
Namangan Region	3.0	3.0	3.0	7.0	38.0
Andijan Region	2.0	3.0	3.0	7.0	35.0
Jizzakh Region	2.0	2.0	3.0	8.0	34.5
Syrdarya Region	1.0	2.0	2.0	7.0	27.0

Note: A score of 0 indicates the lowest, and 10 indicates the highest result. The overall index is presented on a 100-point scale as the weighted sum of the category scores.

As can be seen from the results above, Tashkent City ranks first nationwide in terms of tourism industry development (index ~89.5). The capital shows top results across all categories: economically, it concentrates the largest tourism revenues; socially, it offers the most job opportunities (due to a large restaurant and hotel sector); infrastructure is the most advanced (highest number of hotel beds — 307 hotels — and the largest airport); while the environmental score is relatively satisfactory, it is slightly lower due to the metropolis's specific challenges (transport-related pollution, high anthropogenic load). In second and third places are Samarkand and Bukhara regions, with indices of ~83.5 and 75.5 points, respectively. Both regions score high in economic indicators (they are the top destinations for foreign tourists after Tashkent) and have strong social performance, with many locals employed in tourism [15]. Their infrastructure is well-developed (relatively high hotel and transport availability). For example, by the end of 2022, Bukhara region had 180 operating hotels, ranking just below Tashkent City. However, the environmental scores in Samarkand and Bukhara are moderate — these regions experience high tourist flows, leading to waste and pressure on monuments. Still, in recent years, protective measures have been strengthened. Notably, in preparation for the UNWTO General Assembly held in Samarkand in 2023, several environmental conservation projects were implemented (such as introducing electric buses and improving waste management). While these measures positively impacted Samarkand's ecological profile, the issue of overcrowding at monuments during peak tourist seasons remains pressing.

Tashkent Region (as an administrative unit separate from the capital) ranks fourth (~66.5 points). It benefits from destinations like Chimgan mountain resorts and Chorvoq

recreational zones, giving it relatively strong infrastructural and ecological scores — particularly as the clean mountain areas and natural resources attract tourists. However, its economic and social scores are somewhat lower than Tashkent, Samarkand, and Bukhara, since most foreign tourist spending occurs within the capital or key cultural hubs. Nevertheless, Tashkent Region's infrastructure has recently improved significantly, with the number of hotels growing by 28% (from 76 in 2021 to 97 in 2022), placing it third in hotel count. The middle tier of the ranking includes regions like Khorezm, Surkhandarya, Kashkadarya, and Karakalpakstan (with integral indices ranging between 40–55). Khorezm (centered on Khiva) has been one of the most actively developing regions in recent years — in 2024, Khiva was declared the Tourism Capital of the Islamic World, bringing in many tourists. While Khorezm's economic and infrastructural scores are moderate, positive trends are seen in tourism quality and ecological sustainability. Surkhandarya (Termiz) and Kashkadarya (Karshi, Shakhrisabz) show similar scores — despite their rich historical heritage (Buddhist monuments near Termiz, Timurid-era monuments in Shakhrisabz), their tourism potential remains underutilized. In terms of infrastructure and service quality, these provinces fall below the national average. For example, in 2022, Kashkadarya had only 46 operating hotels (a 7% increase), but this figure is much lower compared to Samarkand or Bukhara. Following the UNESCO-related issues in Shakhrisabz (mentioned earlier), Kashkadarya's environmental score slightly declined, indicating the need for careful measures when developing tourism in the area. The Republic of Karakalpakstan also falls in the middle range — although it offers attractions like the Savitsky Museum in Nukus and eco-tourism opportunities near the Aral Sea, its overall infrastructure is still underdeveloped. For instance, in 2022, only 30 hotels were operating in Karakalpakstan, showing limited accommodation capacity in some districts. At the same time, due to the severe ecological conditions in the Aral Sea area, the government is supporting eco-tourism as a special development program (for example, creating dedicated tourist routes in Moynaq city and across the dried seabed of the Aral Sea). At the lower end of the ranking are the Fergana Valley regions (Fergana, Namangan, Andijan) as well as Jizzakh and Syrdarya regions. Although Fergana and Namangan have high population densities, these areas are not specialized in tourism: mostly internal (domestic) travel and family visits are observed. These regions have relatively few historical monuments or notable landmarks, and the ones that do exist (such as the Khan's Palace in Kokand or landscaped parks in Namangan) are not sufficiently promoted, resulting in low levels of foreign tourist attraction. Accordingly, their economic indicators are also low — with almost no foreign currency income from tourism.

Jizzakh and Syrdarya are also considered regions with relatively limited tourism potential. Although Jizzakh has opportunities for developing eco-tourism and mountain tourism in the Zomin and Nuratau foothill areas, the current infrastructure and services are still insufficient. Syrdarya, on the other hand, mainly serves as a transit region, with virtually no major tourist sites — as a result, Syrdarya recorded the lowest overall index at 27.0 points. According to statistical data, Syrdarya has the least developed tourism infrastructure in the country (for example, only 14 hotels were operating there in 2022). The level of employment in the tourism sector is also among the lowest in this region. Therefore, Syrdarya will need to stimulate the sector by developing specialized forms of tourism (such as hunting or agricultural tourism). These analyses show that there are significant disparities between regions in terms of tourism industry development. Leading regions such as Tashkent City, Samarkand, and Bukhara have achieved high results across all aspects (economic, social, infrastructural, and to some extent environmental) and are becoming internationally competitive tourism hubs. Middle-tier regions like Tashkent Region and Khorezm also show strong potential, with rapid growth observed in recent years — for example, the improved branding of Khiva has increased tourist flows. Regions like Karakalpakstan, Surkhandarya, and Kashkadarya are at an average level of development, with many opportunities yet to be fully tapped. Finally, the Fergana Valley provinces, Jizzakh, and Syrdarya are considered lagging in tourism industry development — in these areas, boosting the sector could be achieved by developing domestic tourism and promoting specific thematic niches.

#### 4. Conclusion

Uzbekistan's regional tourism sector exhibits significant disparities, with Tashkent City, Samarkand, and Bukhara leading in economic, social, infrastructural, and environmental indicators, while regions such as Syrdarya, Jizzakh, and the Fergana Valley lag behind, reflecting uneven development across the country. The findings highlight that while top-performing regions contribute substantially to national tourism revenues and international reputation, mid- and lower-tier regions possess untapped potential that, if strategically developed, could enhance national tourism balance and sustainability. This has important policy implications: targeted investments, infrastructure upgrades, and specialized tourism initiatives (such as eco- and agro-tourism) are needed in underperforming areas to ensure inclusive growth. Furthermore, the study underscores the necessity of continuous monitoring and refinement of the multi-indicator assessment system, integrating more dynamic measures such as visitor satisfaction, environmental carrying capacity, and climate resilience. Future research should focus on developing predictive models to assess the long-term impact of current tourism strategies, incorporating local community perspectives, and evaluating how digital innovations and smart tourism practices can reshape regional tourism dynamics in Uzbekistan.

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