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Article

Methodological Foundations for Assessing Regional Tourism and Recreational Potential and its Cluster-Based Development in Uzbekistan

Begimkulov Javohirbek Jurakul ugli[1], Jabborov Gulom Abduganievich[2]

1. Gulistan State University, PhD student
2. independent researcher, Gulistan State University
*Correspondence: javohirbekbegimqulov@gmail.com, gulomjabborov1501@gmail.com

Abstract: This article examines the methodology for assessing the tourism and recreational potential of the regions of Uzbekistan from economic and ecological perspectives. The author proposes an integrated model (formula) that combines natural, socio-historical, and infrastructure indicators to determine the recreational potential of a region. Based on the results of the SWOT analysis, the weaknesses and risks in the sector are identified, and the necessity of establishing recreational clusters based on public-private partnership (PPP) mechanisms is scientifically substantiated to address them. The conclusions of the study have practical significance in the development of regional tourism strategies.

Keywords:b Tourist-recreational potential, recreational cluster, economic evaluation, integral indicator, public-private partnership, SWOT analysis, infrastructure, socio-economic efficiency.

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Introduction

Global experience shows that the economies of developing countries can achieve significant potential and sustainable development opportunities within a relatively short period through the tourism sector. Uzbekistan, as a country with rich natural and socio-historical resources, possesses substantial tourism potential and highly values the opportunity to achieve macroeconomic stability through this sector. The ongoing reforms aimed at the strategic development of tourism in the Republic of Uzbekistan are yielding significant socio-economic results. As emphasized during the videoconference meeting chaired by Shavkat Mirziyoyev on April 9, 2025: "In recent years, the country's tourism exports have increased by 1.6 times, reaching 3.5 billion US dollars, and more than 2,000 new entrepreneurs have entered the sector. Last year, the number of foreign tourists exceeded 10 million for the first time. Tourism and service infrastructure in the regions is developing rapidly. In particular, over the past eight years, 6.5 billion US dollars have been invested, creating 130,000 accommodation places."[1] These figures indicate that Uzbekistan's attractiveness in the global tourism market has reached a new level.

According to the theoretical foundations of the study, recreation (from the Latin recreation – restoration) refers to the process of restoring a person's physical and mental energy expended during work through leisure and rest [2]. Today, recreational activity is not limited to leisure but also involves improving public health through the rational use

of natural and national recreational complexes, including sanatorium infrastructure and human resources.

However, in the comprehensive assessment of the tourism and recreational potential of regions, it is insufficient to rely solely on economic indicators. Within the framework of evaluating tourism resources, it is methodologically appropriate to consider ecological factors, particularly the level of anthropogenic impact. Furthermore, the current stage of tourism development requires reliance on the principles of clusterization. Clusters contribute to enhancing synergistic effects by stimulating innovation and ensuring the efficient functioning of all participants [3].

The purpose of this study is to improve the methodology for the integrated assessment of tourism and recreational resources in the regions of Uzbekistan and to scientifically substantiate the directions for the formation of recreational clusters based on public-private partnerships. Additionally, the article analyzes the dynamics of tourism flows and regional disparities based on statistical data for the period 2021–2025.

Methods

In this study, system analysis, economic-mathematical modeling, SWOT analysis, and comparative statistical methods were employed to assess the tourism and recreational potential of the Republic of Uzbekistan. The research methodology includes the following stages. As the empirical basis of the study, data from the Statistics Agency of the Republic of Uzbekistan and sectoral reports were used[4].

To comprehensively evaluate the tourism and recreational potential (TRP) of regions, the author proposes an integrated indicator model. Within this model, the ecological condition of the region and the impact of anthropogenic factors are also taken into account. To determine the level of development of the recreational services market, the SWOT analysis method was applied. In this process, the strengths and weaknesses of the market, as well as external opportunities and potential risks (such as changes in state policy and international competition), were analyzed in an interconnected manner.

The study also proposes a cluster-based approach and a public-private partnership (PPP) mechanism to regulate the recreational services market . This model assumes that individual components of the cluster are owned by independent entrepreneurs but are integrated through state financing and investment support[5].

Results

Uzbekistan is considered a country with sufficient tourism potential both in terms of the capacity of its tourist attractions and the quality of services provided, and in recent years, significant development has been observed across all areas of tourism, particularly in the recreational segment (Figure 1).

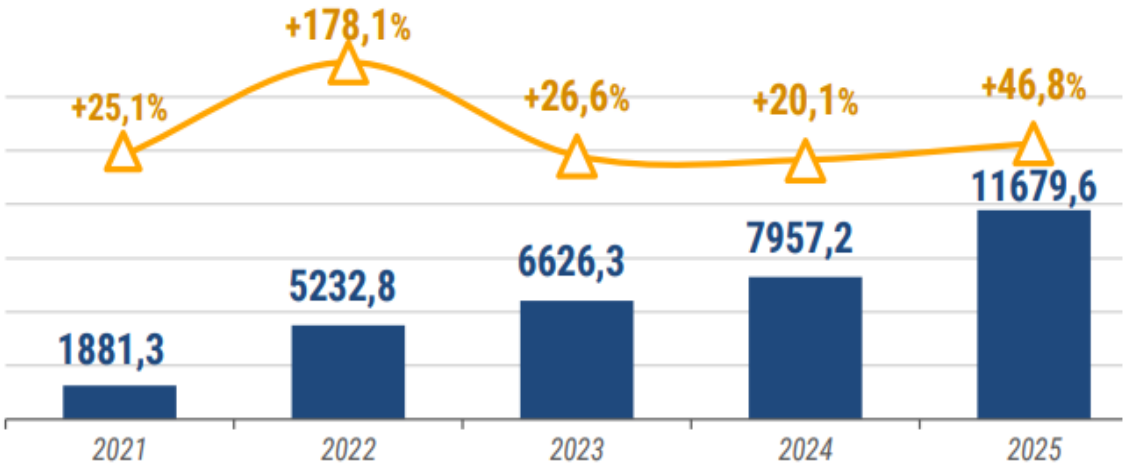


Figure 1. Dynamics of the number of foreign tourists visiting the Republic of Uzbekistan (2021–2025), (thousand persons) [5].

During the analysis of the last five years, the results clearly demonstrate a post-pandemic recovery and rapid growth trend in Uzbekistan's tourism market. According to the presented graphical data, the number of foreign tourist visits amounted to 1,881.3 thousand in 2021, while in 2022 this indicator reached 5,232.8 thousand, showing a record growth rate of +178.1%.

The growth dynamics remained stable in the subsequent years as well:

- in 2023, the number of visits reached 6,626.3 thousand (+26.6%);
- in 2024, it increased to 7,957.2 thousand (+20.1%);
- and in 2025, the sector reached its peak, with the total number of visits amounting to 11,679.6 thousand.

It is noteworthy that the indicator for January–December 2025 is 3,722.4 thousand higher compared to the same period in 2024. The fact that the growth rate in 2025 reached 46.8% indicates that the country's tourism infrastructure and the quality of recreational services have achieved a higher level of international competitiveness.

Table 1. Flow of foreign tourists visiting Uzbekistan and growth rates [6].

Years	Number of visits (thousand visits)	Growth rate compared to previous year (%)
2021	1 881,3	+25,1%
2022	5 232,8	+178,1%
2023	6 626,3	+26,6%
2024	7 957,2	+20,1%
2025	**11 679,6**	**+46,8%**

The analytical data indicate that over the analyzed five-year period, the increase in the number of facilities (excluding tourist bases and other recreational institutions) has been accompanied by a growth in inbound tourism volume. This clearly demonstrates the rising demand for recreation among the population in recent years.

The economic model of tourism and recreational complexes is aimed at assessing the possibilities of locating tourism facilities in specific regions and determining its optimal value in coordinating state and regional interests.

Table 2. Hotels and accommodation facilities by regions of the Republic of Uzbekistan (2024) [7].

Regions	Number of facilities (units)	Number of accommodated persons (thousand people)	Number of rooms (units)	Number of beds (units)
Republic of Uzbekistan	**2 383**	**2 864,3**	**38 075**	**79 469**
Republic of Karakalpakstan	52	38,4	691	1 579
Andijan	68	76,9	1 263	2 456
Bukhoro	250	267,2	3 980	8 423
Jizzakh	47	66,3	689	1 544
Kashkadarya	79	71,3	1 207	2 366
Navoi	36	48,3	1 119	1 978
Namangan	44	66,4	809	1 449
Samarkand	361	428,4	6 603	13 827

Surkhandarya	80	91,6	1 260	2 464
Syrdarya	26	33,8	396	731
Tashkent reg.	116	150,2	1 865	3 928
Fergana	280	81,2	1 541	5 421
Khorezm	100	177,2	2 441	4 955
Tashkent city	844	1 267,1	14 211	28 348

The analysis of regional indicators for the year 2024 shows that the infrastructure of accommodation facilities in the country has reached a new stage in both qualitative and quantitative terms. Compared to the initial period of the study, the following key trends have been identified:

Tashkent city (844 facilities) and Samarkand region (361 facilities) remain the absolute leaders in the tourism services market. The number of accommodated persons in Samarkand (428.4 thousand people) demonstrates that its status as an international "Tourism Gateway" has been further strengthened. In Navoi region, although the number of facilities is relatively low (36 units), the high number of rooms (1,119 units) and occupancy levels indicate the development of business tourism (MICE) in the region. In Andijan region, where a decline was previously observed, the 2024 data showing 76.9 thousand accommodated persons and 68 facilities suggests the beginning of a "recovery" process. Meanwhile, in Syrdarya region, the indicators remain at a low level (33.8 thousand persons), which further highlights the necessity of establishing recreational clusters in this area[8].

Nearly 35% of all facilities are concentrated in Tashkent city alone, indicating the need to diversify recreational resources in order to enhance interregional competitiveness. The high indicators in Fergana (280 facilities) and Bukhara (250 facilities) regions demonstrate that the integration of small and medium-sized enterprises into tourism clusters has been successfully implemented in these areas. To balance regional indicators, it is necessary to expand public-private partnership (PPP) projects based on specialization models such as "Syrdarya – Innovative Tourism" and "Andijan – Agrotourism."

The development of Uzbekistan's recreational services market and its efficiency can be evaluated through the increase in the number of visitors.

Before analyzing the factors influencing the development of the recreational services market in Uzbekistan, a SWOT analysis was conducted to identify its strengths, weaknesses, opportunities, and threats, which helps assess the overall state of the market (Table 3) [9].

Table 3. SWOT analysis of the recreational services market in Uzbekistan.

Strengths	**Weaknesses**
1. High geographical and natural potential of regions where recreational facilities are located; 2. Availability of accommodation facilities within recreational establishments for clients; 3. Availability of various cultural, household, and leisure services within recreational facilities; 4. Growing real demand for recreational services; 5. Availability of qualified specialists in service areas within institutions and enterprises providing recreational services.	1. Insufficient utilization of the existing high potential; 2. Non-compliance of accommodation facilities within recreational sites with international standards; 3. Lack of adequate information about existing recreational facilities and available services; 4. Underdeveloped infrastructure and clusters in areas where recreational service providers are located, as well as low service quality.
Opportunities	**Threats**

1. The growing trend of developing domestic and inbound tourism as a key direction of socio-economic development in Uzbekistan; 2. Increasing investment attractiveness of the recreational tourism sector; 3. Opportunities to expand the service base of recreational services; 4. The potential to create new jobs through the commissioning of new facilities and the formation of clusters.	1. Changes in the state's economic policy related to the recreational services market; 2. Emergence of competition with leading international tourism companies as a result of integration into global information systems; 3. Redistribution of services and revenues among competitors due to the entry of new market players.

The factors included in each group of the SWOT analysis have a direct impact on the direction and dynamics of development in the recreational services market. Naturally, the elements placed within each quadrant of the SWOT matrix determine changes in accordance with their respective categories.

In recent years, the global economic development process has increasingly emphasized the cluster-based development of individual sectors and industries. This approach requires further research within the context of current conditions when addressing the subject of this study. In this regard, the formation of recreational service clusters is recognized as a promising direction for the development of the service market, serving as one of the effective ways to utilize tourism and recreational facilities in the regions of the country[10].

A structural analysis of the current state of the recreational services market shows that most enterprises in this system are not organized in a cluster form. More precisely, the services formed around core recreational facilities have developed independently and in a spontaneous manner based on demand. In other words, the infrastructure systems formed around recreational facilities operate separately, without coordination and without functioning as an integrated system. The lack of linkage between these structures and the core service capacities, on the one hand, leads to their partial operation in an uncertain market environment, and on the other hand, causes disruptions in meeting consumer demand for recreational products and services. As a result, the attractiveness of service-providing enterprises decreases [11].

Taking into account the above-mentioned issues as well as international experience in the functioning of recreational service clusters in developed countries, the study proposes the formation of a structurally integrated recreational services cluster.

There are several possible ownership models for the proposed cluster.

The first model: when all components of the cluster are established using the funds of a single entrepreneur, both core services and infrastructure systems operate in coordination based on each other's performance indicators.

The second model: individual components of the cluster are owned and operated by separate entrepreneurs.

In this study, we propose the second model for organizing recreational service clusters based on a public-private partnership (PPP) mechanism with state involvement (Figure 2).

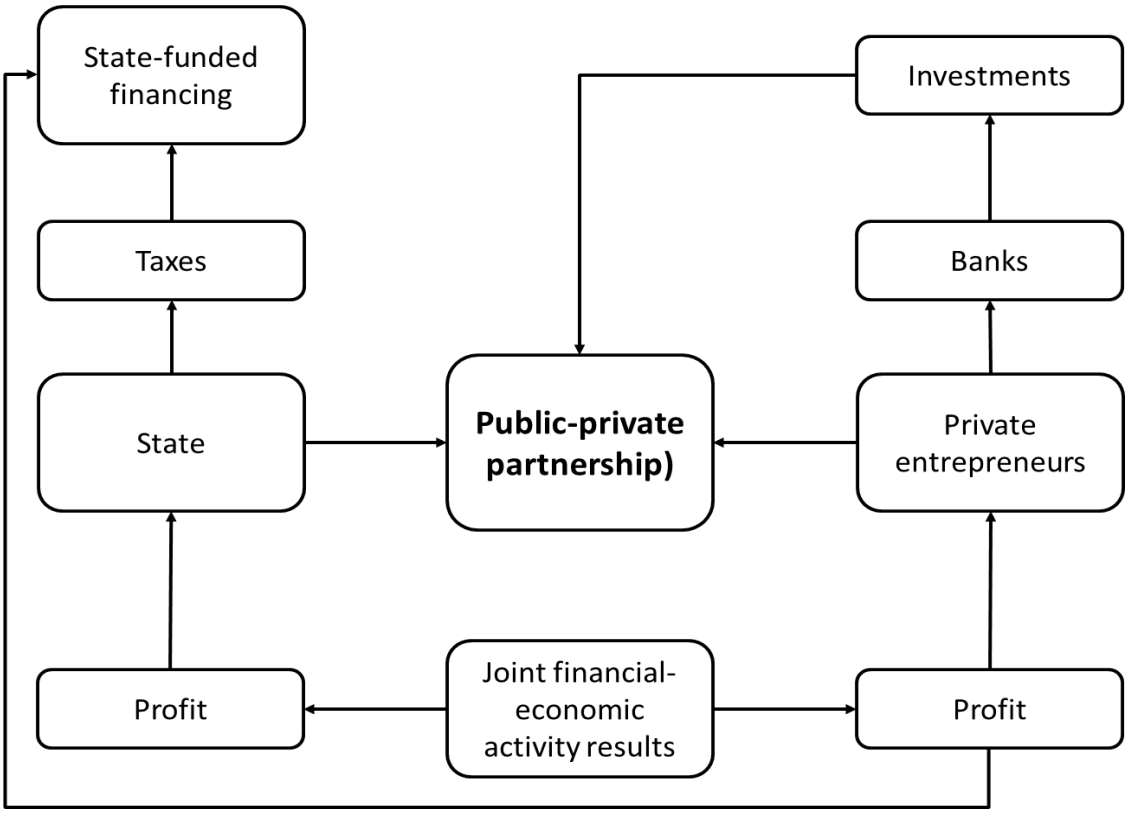


Figure 2. The public-private partnership mechanism in the formation of a recreational services cluster.

Based on the Resolution of the President of the Republic of Uzbekistan dated 20 October 2018, No. PQ-3980, "On priority measures to create the legal and institutional framework for the development of public-private partnerships," recreational service clusters are formed with the participation of both public and private partnership funds [12]. Today, the logical and strategic continuation of these reforms is represented by the "Uzbekistan – 2030" Strategy (Presidential Decree No. PF-158). While Resolution PQ-3980 established the legal foundation of partnership relations in the sector, the "Uzbekistan – 2030" Strategy aims to elevate these relations to a new qualitative stage. Within the framework of the strategy, increasing tourism service volumes by three times and significantly expanding the number of recreational facilities have been defined as priority tasks [13].

The recreational services cluster model proposed in this study fully aligns with these strategic objectives. As outlined in the strategy, the expansion of public-private partnership mechanisms in the implementation of infrastructure projects, as well as the introduction of tax incentives and credit preferences for private partners, are considered key drivers of ensuring the economic efficiency of recreational zones [14].

In this regard, first, risks in cluster financial activities are distributed; second, the state directly participates in the implementation of development programs in the sector. Third, under conditions where the return on investments in recreational facilities is relatively slow, entrepreneurs are directly supported by the state, leading to the emergence of state-supported entrepreneurship. The proposed mechanism also generally illustrates the formation and distribution of financial resources for cluster development[15].

Discussion

In our view, it is appropriate to introduce an environmental assessment component within the framework of developing methodological approaches to the comprehensive evaluation of tourism resources in regions. The ecology of a region reflects the state of the

natural environment and the degree to which anthropogenic factors influence favorable conditions for tourism activities.

Current economic development programs, including sectoral programs for tourism development, are based on clusterization principles. Territorial groupings aim to enhance synergistic effects by stimulating innovation, developing new tourism destinations, and improving the overall efficiency of all cluster participants.

It should be noted that the criteria and indicators for assessing the potential of tourism and recreational resources and their individual elements within groups may differ. Each element depends on the specific characteristics of the territory, its natural-geographical and historical development, as well as strategic and existing economic priorities.

To address the primary task of the economic assessment of tourism and recreational potential, it is advisable—based on the above analysis—to classify resources into the following groups: natural, socio-historical, and infrastructural .

TRS ◎ Btr ◎ Bit ◎ Bin

TRS - is an integral indicator for assessing the recreational potential of a region;

B_{tr} - represents the valuation of natural recreational and tourism resources;

B_{it} - represents the valuation of socio-historical resources;

B_{in} - represents the valuation of infrastructural resources.

The economic assessment of the efficiency of using the recreational and tourism potential of regions is carried out for the purpose of analyzing and evaluating socio-economic indicators characterizing the level of utilization of tourism and recreational potential, as well as the parameters of investment programs for tourism development in the regions.

The proposed indicators can be used to determine the level of regional development and the efficiency of utilizing tourism and recreational potential. The results of the economic assessment of regional tourism and recreational potential represent a qualitative evaluation of natural and other recreational resources that satisfy tourists' demand for tourism services.

The methodological principles for assessing economic conditions in regions make it possible to determine the significance and efficiency of using recreational and tourism potential, as well as the effectiveness of measures adopted within regional tourism development programs. This has practical importance in the development of recreational and tourism management programs.

In the regions of our country, national tourism enterprises operate in a competitive environment alongside strong competitors with significant experience and capacity in the tourism services market. Therefore, the strategy aimed at developing the tourism sector should be oriented toward increasing the competitiveness and development of tourism regions within the country.

Conclusion

Based on the conducted research and statistical analysis, the following scientific and practical conclusions have been formulated regarding the enhancement of Uzbekistan's tourism and recreational potential and the systematic development of the sector:

Comprehensive assessment methodology: It has been demonstrated that tourism and recreational potential should be evaluated not only in terms of economic benefits but also through the interrelationship of natural, socio-historical, and infrastructural factors based on an integral indicator. The ecological condition of a region and the degree of influence of anthropogenic factors are recognized as an essential component of the methodological assessment framework.

Synergetic effect theory: It has been scientifically substantiated that the transition from the spontaneous development of recreational facilities to a cluster-based approach generates a synergetic effect that increases the efficiency of all cluster participants.

Optimality of the TRS model: The proposed model $TRS=B_{tr}+B_{it}+B_{in}$ has been confirmed as an optimal economic-mathematical approach for identifying both the actual and potential capacities of a region.

Mitigation of regional disparities: The analysis revealed stable growth in regions such as Surkhandarya (470.9%) and Jizzakh (220.5%), while a declining trend was observed in Andijan (95.1%) and Syrdarya regions. Accordingly, it is necessary to develop targeted "roadmaps" for infrastructure modernization in regions experiencing decline.

Implementation of PPP mechanisms: It is proposed to apply public-private partnership (PPP) mechanisms in the formation of recreational service clusters. In this model, the state provides investment support and incentives (low risk), while the private sector introduces managerial innovations to ensure service attractiveness.

Standardization of service quality: To address weaknesses identified in the SWOT analysis, particularly the lack of compliance of accommodation facilities with international standards and insufficient information availability, it is necessary to establish regional "Tourism-Recreation Information Centers."

Infrastructure integration: It is recommended to integrate independent service providers operating around recreational facilities into a unified cluster chain in order to fully meet the needs of tourists (recreants) and prevent service disruptions.

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