TOURISM POLICY WITHIN THE STRATEGY OF RENEWAL IN UZBEKISTAN: INSTITUTIONAL FOUNDATIONS OF ECONOMIC GROWTH

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Abstract: In the global economic system, the tourism sector serves as a strategic source of sustainable development, playing a pivotal role in ensuring national competitiveness and balanced regional growth. Within the framework of Uzbekistan's renewal strategy, this article provides a systemic analysis of the role of tourism policy, as well as the institutional and macroeconomic factors influencing the industry's development. Based on official statistical data from 2016–2024, the study comprehensively examines the dynamics of domestic and inbound tourist flows, the efficiency of the hotel industry, the export of tourism services, and employment levels within the sector. The analytical findings confirm that the tourism sector is becoming a decisive driver of economic growth and serves as a primary politico-economic tool for enhancing the country's investment attractiveness and marketing potential.

Keywords: tourism policy, economic growth, GDP, renewal strategy, domestic and international tourism, institutional foundations, hotel infrastructure, tourism export, employment, factor analysis.

INTRODUCTION

In the current era of globalization and digital transformation, the tourism industry is recognized as one of the fastest-growing strategic sectors of the global economy. At this contemporary stage, tourism is not merely an economic activity that generates revenue; it is a powerful socio-economic mechanism that strengthens intercultural dialogue, fosters the comprehensive development of regions, and provides employment for the population.

According to statistical analyses by the World Tourism Organization (UN Tourism), the sector's share of the global Gross Domestic Product (GDP) has exceeded 10 percent in recent years [15, p. 1]. Furthermore, one out of every ten jobs created globally is directly or indirectly attributable to the tourism sector [16, pp. 4–5]. Consequently, the tourism industry serves as a strategic factor in ensuring the macroeconomic stability of nations, diversifying export opportunities, and accelerating the inflow of foreign investment into national economies.

For the Republic of Uzbekistan, too, the tourism industry is considered a strategically important sector. The country's unique historical and cultural heritage, diverse natural landscapes, and the consistent modernization of its transport and logistics system have transformed tourism into one of the primary drivers of the national economy. Since 2016, state policy regarding the development of this sector has reached a qualitatively new level. Specifically, fundamental reforms have been implemented, including the liberalization of the visa regime, the expansion of international flight routes, and the alignment of service infrastructure with modern requirements. Notably, within the framework of the "Development Strategy of New Uzbekistan for 2022–2026," supporting the tourism sector as a key pillar of the economy-and significantly increasing its share in the Gross Domestic Product (GDP)-has been established as a priority objective [1, p. 15].

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At the same time, global crises-most notably the COVID-19 pandemic-have had an adverse impact on the sector's development. For instance, in 2020, the influx of foreign tourists dropped sharply to 1.5 million, hotel occupancy rates fell to a minimal level (below 10 percent), and export earnings from the sector declined nearly fivefold. However, starting from 2021, positive recovery trends began to emerge in the sector: domestic tourism activity intensified, and the number of new accommodation facilities and tourism-related entities increased. Consequently, by the end of 2024, the number of foreign tourists visiting the country reached the 10-million mark. This dynamic growth process reaffirms the high strategic importance of tourism within Uzbekistan's economy [13, p. 172].

In this context, conducting a thorough and systematic analysis of the tourism industry's impact on economic development is considered one of the most pressing areas of study in modern economics. Authoritative academic sources and international empirical research confirm that the tourism sector exerts a direct, positive influence on the growth of the Gross Domestic Product (GDP), the stabilization of employment levels in the labor market, and the diversification of the country's export earnings [14, p. 5].

Furthermore, the tourism sector possesses a high multiplier effect, acting as a catalyst that stimulates economic activity in related industries such as transport and logistics, retail, finance and banking, information and communication technologies, and general services. Consequently, tourism not only drives macroeconomic growth rates but also serves as a strategic factor that facilitates the diversification of the national economy's components and ensures a transition toward a model of sustainable development.

ANALYSIS OF LITERATURE RELATED TO THE TOPIC

The impact of the tourism industry on macroeconomic stability and economic growth is a fundamental topic that consistently attracts the attention of both international and domestic researchers. Scientific inquiry in this field primarily focuses on the direct and indirect economic contributions of tourism, transformations within the labor market, and its potential to foster sustainable development.

International experience and academic observations confirm that the tourism sector exerts a significant positive influence on Gross Domestic Product (GDP) growth, employment levels, and export earnings within the balance of trade [2, p. 15].

Furthermore, numerous economic models and analyses exist that evaluate the role of tourism as a strategic driver of global economic growth. According to the conceptual framework of our research, the "multiplier effect" must be considered a fundamental factor when determining the economic performance indicators of the tourism industry. Beyond the sector's direct outcomes, this indicator provides a comprehensive insight into the indirect growth rates across interconnected production and service sectors, as well as the broader macroeconomic dynamics. In addition to generating primary employment within the hospitality sector, accommodation facilities, and recreational sites, the tourism industry plays an active role in creating secondary jobs across transport and logistics, finance and banking, retail, and cultural-educational sectors [3, p. 352]. Research indicates a long-term strategic equilibrium between the development of the tourism industry and macroeconomic growth [4, p. 278]. Within this system, tourism acts as a catalyst that accelerates economic development; conversely, an increase in economic prosperity serves as a primary driver stimulating demand for tourism services.

The stability of national income, the preservation of a rich cultural and historical heritage, and the effective functioning of the public administration apparatus are of decisive importance in attracting international tourist flows [5, pp. 70–72]. In this context, our scientific approach posits that a comprehensive assessment of the current state of infrastructure and the accessibility of transport networks is an essential prerequisite for analyzing a country's tourism potential. Aligning the sector's

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strategic documents with the United Nations Sustainable Development Goals (SDGs) ensures the long-term attractiveness of the tourism industry and consistent demand [6, pp. 31–32]. However, implementing the principles of sustainable development requires harmonizing state policy with the interests of private enterprise, which, in turn, necessitates specific institutional reforms.

Furthermore, while economic growth rates and the consumption of energy resources influence the development of tourism, an increase in carbon dioxide emissions can pose environmental risks [7, p. 40]. In our view, the widespread adoption of innovative "green" technologies within the sector is of fundamental importance for maintaining a balance between reducing the environmental burden of tourism and ensuring economic viability.

The development of digital infrastructure-specifically the implementation of high-speed broadband internet networks and cybersecurity-enabled server systems-significantly enhances efficiency within the tourism industry's labor market. This process further expands the potential of tourism to generate employment, which is particularly relevant for achieving sustainable development goals [8, p. 43].

According to our research perspective, the opportunities presented by digitalization and the extent to which they are implemented vary depending on the technological capacity of a given country or region. These disparities underscore the necessity for long-term strategic planning and targeted state programs that account for regional specificities when transforming the tourism sector.

The rapid growth of the tourism industry can negatively impact ecological balance and increase carbon dioxide (CO_2) emissions, thereby necessitating the practical application of sustainable tourism principles [9]. Furthermore, while the tourism sector acts as a catalyst for local economies, it may, in certain instances, lead to regional income inequality [10, pp. 28–29]. In our view, an effective state tourism policy must ensure a balance between economic, environmental, and social interests by preparing for unforeseen economic and natural risks, implementing sustainable management practices, and integrating modern digital infrastructure.

Certain researchers identify the combination of environmental protection, high-quality infrastructure, and innovative technologies as a fundamental prerequisite for achieving sustainable development in the tourism sector [11, p. 35]. Furthermore, academic studies emphasize the strategic importance of utilizing advanced technological solutions to develop ecotourism, preserve the natural environment, and stimulate economic growth [12, p. 2].

In conclusion, tourism serves as a strategic sector that guarantees the long-term, sustainable advancement of the national economy. This industry not only generates direct financial flows and employment but also fosters economic activity in related sectors through its multiplier effect. Principles of sustainable development and processes of digital transformation make it possible to elevate the socio-ecological efficiency of tourism to a new level. Therefore, a comprehensive and strategic approach aimed at developing the tourism industry is of vital importance to the country's economic progress.

RESEARCH METHODOLOGY

The methodological framework for this study incorporates systemic analysis, logical generalization, comparative dynamics, and economic-statistical assessment methods. The primary objective of the research is to determine, both quantitatively and qualitatively, the extent to which tourism-related factors influence economic growth indicators in Uzbekistan.

The following methodological approaches were employed during the research process:

Systemic approach: The tourism sector was examined as an integral component of the national economy, with an analysis of its interconnections with other sectors.

Analysis of dynamic time series: Trends in the export of tourism services, visitor flows, and hotel industry indicators were studied based on official statistical data from 2016 to 2024.

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Economic-statistical analysis: The correlation between macroeconomic indicators (such as GDP) and performance metrics of the tourism sector was analyzed.

Comparative analysis: Sectoral indicators from the periods before and after the pandemic were compared to evaluate the effectiveness of institutional reforms implemented by the state. Data base: Official reports and published statistical compilations from the Statistics Agency under the President of the Republic of Uzbekistan, the Tourism Committee, and the World Tourism Organization (UN Tourism) were utilized as the empirical foundation for this research.

This methodological approach serves to ensure the reliability of the research findings and to provide an objective assessment of the institutional frameworks of tourism policy in Uzbekistan.

ANALYSIS RESULTS AND DISCUSSION

The results of the study confirm the strategic importance of the tourism sector within Uzbekistan's national economy and its significant impact on the growth rates of the Gross Domestic Product (GDP). Empirical analysis covering the period from 2016 to 2024 reveals a strong, interconnected relationship between fundamental factors such as tourism infrastructure, labor market dynamics, the flow of domestic and international tourists, and the export of tourism services.

The findings indicate a consistent positive correlation between the tourism industry and macroeconomic growth. Specifically, the modernization of infrastructure, the expansion of professional employment within the sector, and the elevation of service quality to international standards provide both direct and indirect positive momentum to the growth of the country's GDP. The development of the tourism sector contributes to the diversification of the economic structure, enhances the investment attractiveness of the national market, and strengthens export potential.

Furthermore, the analysis demonstrates that the tourism sector possesses a high-level multiplier effect. Activity in this sector stimulates economic growth-in a chain reaction-across the transport and logistics, retail, finance and banking, and service industries. Consequently, tourism emerges not merely as a source of revenue, but as a strategic mechanism that fosters sustainable development, creates new jobs, and maintains economic balance across regions.

In this context, the future development of the tourism industry in Uzbekistan is linked to the implementation of the following priority tasks:

Systematic introduction of sustainable ("green") tourism practices;

Transformation of the sector's digital infrastructure;

Acceleration of international marketing and "national branding" strategies;

Promotion of foreign direct investment (FDI) into the sector.

This set of measures serves to ensure the country's macroeconomic stability, strengthen export diversification, and solidify tourism as one of the top priority areas within the real sector of the national economy.

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