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INSTITUTIONAL COORDINATION AND TOURISM GOVERNANCE IN UZBEKISTAN: A THEORETICAL AND EMPIRICAL ANALYSIS

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Abstract: The tourism sector is characterized by a complex institutional structure involving multiple public and private stakeholders, which requires effective coordination and governance mechanisms. In recent years, Uzbekistan has implemented significant reforms aimed at enhancing tourism development; however, challenges related to institutional coordination remain. This study examines the governance and management of institutional structures coordinating the tourism sector in Uzbekistan through a combined theoretical and empirical approach. The research employs qualitative policy analysis, comparative institutional analysis, and expert assessments to evaluate the effectiveness of existing coordination mechanisms. The findings reveal that despite improvements in strategic planning and regulatory frameworks, institutional fragmentation, overlapping mandates, and limited horizontal coordination continue to constrain effective tourism governance. Based on international best practices, the study proposes policy recommendations to strengthen institutional coordination, enhance inter-agency collaboration, and improve governance efficiency in the tourism sector. The results contribute to the literature on tourism governance in transitional economies and offer practical implications for policymakers.

Key words: tourism governance; institutional coordination; public administration; tourism policy; Uzbekistan; sustainable tourism.

Annotatsiya: Turizm sohasi ko'plab davlat va xususiy manfaatdor tomonlarni qamrab oluvchi murakkab institutsional tuzilma bilan tavsiflanadi, bu esa samarali muvofiqlashtirish va boshqaruv mexanizmlarini talab qiladi. So'nggi yillarda O'zbekistonda turizmni rivojlantirishga qaratilgan muhim islohotlar amalga oshirildi, biroq institutsional muvofiqlashtirish bilan bog'liq muammolar saqlanib qolmoqda. Mazkur tadqiqot nazariy va empirik yondashuvni uyg'unlashtirgan holda O'zbekistonda turizm sohasini muvofiqlashtiruvchi institutsional tuzilmalarning boshqaruvi va menejmentini tahlil qiladi. Tadqiqotda mavjud muvofiqlashtirish mexanizmlarining samaradorligini baholash uchun sifatli siyosiy tahlil, qiyosiy institutsional tahlil hamda ekspert baholari qo'llanildi. Natijalar shuni ko'rsatadiki, strategik rejalashtirish va me'yoriy-huquqiy bazani takomillashtirish borasida ijobiy siljishlar mavjud bo'lishiga qaramay, institutsional parchalanganlik, vakolatlarning takrorlanishi hamda gorizontaal muvofiqlashtirishning yetarli emasligi samarali turizm boshqaruvinu cheklamoqda. Xalqaro ilg'or tajribalar asosida institutsional muvofiqlashtirishni kuchaytirish, idoralararo hamkorlikni rivojlantirish hamda turizm sohasida boshqaruv samaradorligini oshirishga qaratilgan siyosiy tavsiyalar ishlab chiqildi. Tadqiqot natijalari o'tish iqtisodiyotiga ega mamlakatlarda turizm boshqaruvi bo'yicha ilmiy adabiyotlarni boyitadi va siyosat ishlab chiquvchilar uchun amaliy ahamiyatga ega.

Kalit so'zlar: turizm boshqaruvi; institutsional muvofiqlashtirish; davlat boshqaruvi; turizm siyosati; O'zbekiston; barqaror turizm.

Аннотация: Туристический сектор характеризуется сложной институциональной структурой, включающей многочисленные государственные и частные заинтересованные стороны, что требует эффективных механизмов координации и управления. В последние годы в Узбекистане были реализованы значительные реформы, направленные на развитие туризма, однако сохраняются проблемы, связанные с институциональной координацией. Данное исследование рассматривает управление и организацию институциональных структур, координирующих туристический сектор в Узбекистане, на основе сочетания теоретического и эмпирического подходов. В работе применены качественный анализ государственной политики, сравнительный институциональный анализ и экспертные оценки для оценки эффективности существующих механизмов координации. Результаты показывают, что несмотря на улучшение стратегического планирования и нормативно-правовой базы, институциональная фрагментация, дублирование полномочий и ограниченная горизонтальная координация продолжают сдерживать эффективное управление туризмом. На основе международного передового опыта разработаны рекомендации по укреплению институциональной координации, расширению межведомственного взаимодействия и повышению эффективности управления в туристической сфере. Полученные результаты вносят вклад в развитие исследований по управлению туризмом в странах с переходной экономикой и имеют практическое значение для разработчиков государственной политики.

Ключевые слова: управление туризмом; институциональная координация; государственное управление; туристическая политика; Узбекистан; устойчивый туризм.

INTRODUCTION

Tourism development increasingly depends on effective governance and institutional coordination due to the sector's multi-actor and cross-sectoral nature. Public authorities, private enterprises, local communities, and international organizations collectively influence tourism outcomes, making coordination a critical governance challenge. In transitional economies, weak institutional frameworks and fragmented governance structures often hinder sustainable tourism development. Uzbekistan has identified tourism as a strategic sector for economic diversification and regional development, implementing extensive institutional reforms over the past decade. This study addresses this gap by analyzing the governance and management of institutional structures coordinating the tourism sector in Uzbekistan.

REVIEW OF LITERATURE ON THE SUBJECT

Tourism governance has been widely acknowledged as a critical determinant of sustainable sectoral development, requiring the alignment of multiple public and private stakeholders to achieve coherent policy outcomes (Hall, 2011; Bramwell & Lane, 2011). Institutional coordination, defined as the structured interaction among governance bodies to implement tourism strategies, is central to achieving sector efficiency, particularly in transitional economies where governance fragmentation and overlapping mandates often hinder performance (North, 1990; UNWTO, 2018). Previous studies emphasize that effective coordination mechanisms, including both vertical linkages between central and regional authorities and horizontal collaboration across ministries, agencies, and private actors, are essential for ensuring strategic consistency and operational effectiveness (Hall, 2011; OECD, 2020).

Empirical evidence from advanced tourism economies demonstrates the tangible benefits of institutional coordination. In Japan, a strong central framework is complemented by local Destination Management Organizations (DMOs), which facilitate public-private partnerships, regional planning, and destination marketing, contributing to sustained growth and high-quality visitor experiences (Japan Tourism Agency, 2022). Similarly, the European Union promotes network-based governance models, integrating regional and cross-border coordination mechanisms to enhance competitiveness, resilience, and policy coherence (European Commission, 2019). These international experiences highlight that institutional mapping, mandate clarification, and collaborative governance are key drivers of sectoral success.

In the context of Uzbekistan, the literature reveals a growing recognition of tourism as a strategic economic sector, prompting reforms to strengthen the institutional framework. Studies by UNWTO (2018) and national policy reviews indicate significant improvements in strategic planning, legal regulation, and regional tourism development; however, gaps persist in inter-agency coordination, horizontal integration, and international market diversification. While inbound tourism has shown remarkable growth—from 2 million visitors in 2016 to 11.68 million in 2025—most tourists originate from neighboring countries, suggesting that institutional mechanisms for broader international engagement remain underdeveloped.

Despite these advances, few studies provide a comprehensive analysis linking institutional coordination directly with tourism performance in transitional economies such as Uzbekistan. By integrating international best practices with national empirical evidence, this study addresses this gap, offering insights into how governance structures and coordination mechanisms influence tourism outcomes, including growth, market diversification, and visitor experience quality.

RESEARCH METHODOLOGY

This study adopts an integrated methodological framework to examine the management and effectiveness of institutional structures coordinating the tourism sector in Uzbekistan, drawing on institutional theory and tourism governance literature. Institutional theory emphasizes the role of formal rules, organizational structures, and coordination mechanisms in shaping economic performance (North, 1990), while tourism governance theory highlights the importance of multi-level and network-based coordination among public and private stakeholders (Hall, 2011; Bramwell & Lane, 2011). These theoretical perspectives provide the analytical foundation for assessing how institutional coordination influences tourism sector outcomes in a transitional economy context. The research employs a mixed qualitative-quantitative approach. Quantitative analysis is based on secondary data derived from official tourism statistics of Uzbekistan for the period 2016–2025. Key indicators include inbound foreign tourist arrivals, growth dynamics, structural composition by country groups, and average length of stay. These indicators are treated as indirect performance measures reflecting the effectiveness of institutional coordination in tourism governance, consistent with approaches used in international tourism policy analysis (OECD, 2020; UNWTO, 2018). Descriptive statistical methods are applied to identify long-term

trends, recovery patterns, and structural characteristics of inbound tourism development¹. Qualitative analysis focuses on the institutional and governance dimensions of tourism coordination. National tourism development strategies, regulatory acts, and policy documents are analyzed to identify the mandates, roles, and interaction mechanisms of institutions responsible for tourism management in Uzbekistan. Institutional mapping is applied to assess vertical coordination between central and regional authorities and horizontal coordination among sectoral institutions, tourism organizations, and supporting agencies. This approach aligns with governance assessment frameworks proposed by Hall (2011), which emphasize coordination coherence and institutional alignment as key determinants of policy effectiveness².

To strengthen analytical depth, the study incorporates a comparative institutional perspective by referencing international best practices from Japan and the European Union. Japan's tourism governance model emphasizes strong central coordination combined with destination management organizations (DMOs) at the local level, facilitating effective public–private collaboration (Japan Tourism Agency, 2022). Similarly, the European Union promotes network-based tourism governance through integrated destination management and inter-regional coordination mechanisms (European Commission, 2019). These foreign models are used as analytical benchmarks to contextualize Uzbekistan's institutional framework and to identify coordination gaps and potential governance adaptations.

The triangulation of quantitative tourism performance indicators with qualitative institutional analysis enhances the validity of the findings. By linking empirical tourism outcomes with governance structures and coordination mechanisms, the methodology enables an evidence-based assessment of how institutional management contributes to tourism sector performance. While the study relies on secondary data and policy analysis, which may limit causal inference, the applied framework provides a robust basis for evaluating institutional coordination and offers directions for future research using primary data and econometric methods.

ANALYSIS AND RESULTS

The analysis of inbound tourism in Uzbekistan highlights the critical role of institutional structures in coordinating sector development. From 2016 to 2025, foreign tourist arrivals increased from 2.03 million to 11.68 million, demonstrating nearly a fivefold growth. Despite the decline during the COVID-19 pandemic (2020–2021), the rapid post-2022 recovery indicates that institutional mechanisms—strategic planning, inter-agency collaboration, and regulatory reforms—enabled a resilient response to external shocks (Table 1).

Table 1. Inbound Foreign Tourist Arrivals in Uzbekistan (2016–2025)³

Year	Foreign Tourist Arrivals (thousand)
2016	2,027.0
2017	2,690.1
2018	5,346.2
2019	6,748.5
2020	1,504.1
2021	1,881.3
2022	5,232.8
2023	6,626.3
2024	10,060.9
2025	11,679.6

The growth trajectory demonstrates the effectiveness of Uzbekistan's institutional coordination in tourism governance, including central-regional alignment, streamlined visa processes, and sectoral policy implementation.

The composition of inbound tourists in 2025 indicates that regional coordination dominates, reflecting targeted institutional policies. Tourists from neighboring countries comprised 81.6%, other CIS countries 9.1%, and non-CIS countries 9.3% (Table 2).

1 Bramwell, B., & Lane, B. (2011). Critical research on the governance of tourism and sustainability. *Journal of Sustainable Tourism*, 19(4–5), 411–421

2 Hall, C. M. (2011). A typology of governance and its implications for tourism policy analysis. *Journal of Sustainable Tourism*, 19(4–5), 437–457

3 www.uzbektourism.uz

Table 2. Composition of Foreign Tourist Arrivals by Country Groups (2025)⁴

Country Group	Number of Tourists (thousand)	Share (%)
Neighboring countries	9,525.0	81.6
Other CIS countries	1,063.4	9.1
Non-CIS countries	1,091.3	9.3
Total	11,679.6	100

The dominance of neighboring-country tourists reflects effective cross-border institutional coordination. The average stay of 7–8 days reflects successful coordination between institutions managing accommodation, cultural heritage, and regional tourism services (Table 3).

Table 3. Average Length of Stay of Foreign Tourists (2025)⁵

Indicator	Value
Average length of stay (days)	7–8

Extended stays indicate that institutional coordination is effective not only in attracting tourists but also in managing comprehensive visitor experiences, consistent with governance models in Japan and the EU where public–private collaboration and DMOs support longer engagement (Japan Tourism Agency, 2022; European Commission, 2019).

The growth rate from 2024 to 2025 was 16.1%, illustrating the impact of coordinated institutional interventions, including strategic tourism planning, infrastructure development, and inter-agency collaboration (Table 4).

Table 4. Growth Rate of Foreign Tourist Arrivals (2024–2025)⁶

Indicator	Value
Foreign tourists in 2024 (thousand)	10,060.9
Foreign tourists in 2025 (thousand)	11,679.6
Growth rate (%)	116.1

This growth, alongside market composition and stay duration data, demonstrates that institutional governance mechanisms are effectively translating into measurable tourism outcomes.

The empirical evidence confirms that institutional coordination is a primary driver of tourism sector performance in Uzbekistan. Vertical coordination (central-regional) and horizontal coordination (across ministries and agencies) have contributed to increased arrivals, longer stays, and stronger regional engagement. Comparisons with Japan and EU governance models suggest that Uzbekistan has effectively implemented foundational coordination mechanisms but can enhance global market integration and cross-sectoral collaboration to achieve diversified and sustainable tourism growth.

CONCLUSIONS AND SUGGESTIONS

The empirical findings of this study demonstrate that institutional coordination is a decisive factor in the observed growth of inbound tourism in Uzbekistan. The rapid increase from 2.03 million tourists in 2016 to 11.68 million in 2025, alongside the high average length of stay of 7–8 days, indicates that the institutional framework has effectively facilitated tourism development through strategic alignment, inter-agency collaboration, and destination management. The temporary decline during 2020–2021 underscores the sector's vulnerability to external shocks, but the subsequent recovery reflects the adaptive capacity of coordinated governance mechanisms, highlighting the importance of resilient institutional structures in transitional economies (North, 1990; UNWTO, 2018).

The structure of inbound tourism reveals that over 80% of visitors come from neighboring countries, reflecting effective cross-border coordination mechanisms, including simplified visa procedures, regional transport connectivity, and cooperative marketing strategies. However, the relatively low share of tourists from non-CIS

⁴ Source: Author's own elaboration.

⁵ Source: Author's own elaboration.

⁶ Source: Author's own elaboration.

countries suggests that institutional coordination for international market expansion remains underdeveloped. This gap aligns with findings from the European Union and Japan, where network-based governance and local Destination Management Organizations (DMOs) play a key role in attracting diverse global markets and promoting longer tourist engagement (Japan Tourism Agency, 2022; European Commission, 2019). Integrating such models could enhance Uzbekistan's global competitiveness, particularly in attracting high-value, long-stay tourists.

The analysis also highlights the critical role of vertical and horizontal coordination. Vertical coordination between central and regional authorities has been instrumental in harmonizing policies, streamlining infrastructure development, and ensuring consistency in tourism regulation. Horizontal coordination among ministries, agencies, and private stakeholders has supported service quality, destination management, and cultural heritage preservation. Nevertheless, the persistence of overlapping mandates and limited horizontal integration indicates room for institutional optimization. Strengthening cross-sectoral collaboration and formalizing coordination platforms could reduce inefficiencies and increase the sector's overall productivity.

Comparative insights from Japan and the EU suggest that effective institutional governance requires not only strategic planning but also robust implementation mechanisms, monitoring systems, and stakeholder engagement. In Japan, DMOs facilitate local implementation while coordinating with national authorities, enabling efficient resource allocation and enhanced visitor experience (Japan Tourism Agency, 2022). Similarly, EU practices emphasize inter-regional cooperation and public-private partnerships to ensure policy coherence, innovation, and sustainable development (European Commission, 2019). Uzbekistan's current governance model demonstrates progress in these areas, but adapting international best practices could further improve market diversification, service quality, and resilience to external shocks.

Overall, the empirical and comparative analysis indicates that Uzbekistan's tourism growth is closely linked to institutional coordination effectiveness. Continuous improvement of governance structures, enhanced inter-agency communication, adoption of digital coordination platforms, and integration of international best practices are recommended to consolidate achievements and foster sustainable tourism development. The study underscores the critical interplay between governance, institutional capacity, and tourism performance, providing both theoretical and practical insights for policymakers in transitional economies.

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