

**A CLUSTER-BASED METHODOLOGY FOR ASSESSING THE
COMPETITIVENESS OF UZBEKISTAN’S TOURISM SECTOR: LESSONS FROM
TÜRKİYE’S TOURISM CLUSTER DEVELOPMENT**

Хуршид Тошпўлатов

INTRODUCTION

Tourism clusters have emerged as a strategic approach to enhancing destination competitiveness in many countries. A tourism cluster is defined as a geographically proximate group of interconnected companies and associated institutions in the tourism field, linked by commonalities and complementarities (ScholarWorks UMass, n.d.). Clusters create competitive advantages through agglomeration economies, knowledge spillovers, specialised infrastructure, coordinated marketing, and collective action. In this context, the competitiveness of a tourism sector can be understood not only as a national phenomenon but also as a regional and local phenomenon driven by cluster dynamics. Uzbekistan has experienced rapid tourism growth in recent years. The number of foreign tourists visiting Uzbekistan grew in 2024 by 20 per cent to 8 million people, and the country’s export of tourism services surged from USD 2.14 billion in 2023 to USD 3.52 billion in 2024 (U.S. Department of Commerce, 2021). The government has identified 135 mahallas (local communities) in 28 districts and cities with high tourist potential in order to develop the service sector by applying a specific approach to each region based on their peculiarities, providing business entities with financial resources and infrastructure, and introducing a favourable tax regime for them (Embassy of Uzbekistan in China, 2024). Two tourism-recreational zones have been created (Charvak and Zomin), with three more under construction (Shahrisabz, Maydanak, and Okhalik-Okbuyro-Mironkul) (Embassy of Uzbekistan in China, 2024). These measures indicate that Uzbekistan recognises cluster-based development as a strategic instrument for tourism competitiveness. Türkiye provides a relevant comparative case because it has developed tourism clusters in coastal regions, cultural heritage zones, and thermal tourism areas. Türkiye ranks sixth globally in tourism export revenues and is the most competitive among Spain, Portugal, Malaysia, Morocco, Egypt, Indonesia, Greece, and Italy, which have a medium competitive advantage (Wisdomlib, 2024). Türkiye’s competitiveness in world tourism exports over the period 2010–2023 reflects strong cluster dynamics in regions such as Antalya, Bodrum, Marmaris, Cappadocia, and Pamukkale. These clusters leverage agglomeration economies, specialised infrastructure, coordinated marketing, and collective action to enhance competitiveness.

Literature Review

Porter’s diamond model of national competitive advantage has been highly influential in cluster theory and tourism competitiveness research. Porter defined the cluster as a geographically proximate group of interconnected companies and associated institutions in a particular field, linked by commonalities and complementarities (ScholarWorks UMass, n.d.). The diamond model proposes that there are four sources of national and locational competitive advantage and their interactions: factor conditions, firm strategy, structure and

rivalry, demand conditions, and related and supporting industries (ScholarWorks UMass, n.d.). Applied to tourism, the diamond model suggests that tourism competitiveness is determined by factor conditions such as natural factors, cultural and creative resources, capital resources, infrastructure, and human resources (FEAA UCV, n.d.). Demand conditions refer to the size of the market, its structure, seasonality, degree of internationalisation, cultural consumption habits, and the presence of sophisticated tourists (FEAA UCV, n.d.). Related and supporting industries include railway, road, air, and sea infrastructure, cultural facilities, recreational and sports facilities, restaurants, shopping facilities, and high-quality travel services (FEAA UCV, n.d.). Firm strategy, structure, and rivalry refer to the competitive dynamics among tourism firms, their business models, and their innovation capacity. The tourism cluster is an accumulation of resources and attractions, infrastructures, equipment, service companies, other supporting sectors, and administrative organisms whose integrated and coordinated activities allow providing services to customers (FEAA UCV, n.d.). Using both specific elements of tourism, researchers have found that four major components determine the competitiveness of the tourism destination, taking into account the influence of micro and macro environment: inherited resources, created resources, supporting factors and resources, destination management, situational conditions, and demand conditions (FEAA UCV, n.d.). The Ritchie and Crouch destination competitiveness model has been adapted to cluster analysis in tourism. They have suggested that tourism destination competitiveness is determined by four major components: qualifying determinants (location, dependencies, safety, and cost), destination management (resource stewardship, marketing, organisation, information, and service), core resources and attractors (physiography, culture and history, market ties, mix of activities, special events, and tourism superstructure), and supporting factors and resources (infrastructure, accessibility, facilitating resources, and enterprise) (ScholarWorks UMass, n.d.). This model emphasises that competitiveness is not determined by resources alone but also by management capacity and supporting conditions. Applied to clusters, the Ritchie and Crouch model suggests that cluster competitiveness depends on the quality of core resources and attractors within the cluster, the strength of supporting factors and resources, the effectiveness of destination management at the cluster level, and the influence of qualifying determinants such as location, safety, and cost. Clusters that integrate these components effectively are more likely to achieve sustainable competitive advantages. Türkiye’s tourism sector demonstrates strong cluster dynamics in coastal regions, cultural heritage zones, and thermal tourism areas. According to 2023 Trade Map data, Türkiye ranks sixth globally in tourism export revenues and is the most competitive among Spain, Portugal, Malaysia, Morocco, Egypt, Indonesia, Greece, and Italy, which have a medium competitive advantage (Wisdomlib, 2024). Türkiye’s competitiveness in world tourism exports over the period 2010–2023 reflects strong cluster dynamics in regions such as Antalya, Bodrum, Marmaris, Cappadocia, and Pamukkale.

3. Methodology

This study employs a conceptual and methodological approach to develop a cluster-based methodology for assessing the competitiveness of Uzbekistan’s tourism sector. The research design consists of four stages: theoretical framework development, comparative

analysis of Türkiye and Uzbekistan, dimension selection and weighting, and construction of a cluster competitiveness assessment matrix. In the first stage, the theoretical framework was developed by integrating Porter’s diamond model, the Ritchie and Crouch destination competitiveness model, and recent cluster theory applied to tourism. These models provide complementary perspectives on cluster competitiveness, emphasising factor conditions, demand conditions, related and supporting industries, firm strategy and rivalry, institutional coordination, and cluster performance outcomes. In the second stage, a comparative analysis of Türkiye and Uzbekistan was conducted using tourism export data, cluster development reports, and policy documents. Türkiye’s rank of sixth globally in tourism export revenues and its strong cluster dynamics in coastal, cultural, and thermal tourism regions provide a benchmark for identifying gaps and priorities (Wisdomlib, 2024). Uzbekistan’s development of tourism-recreational zones and mahalla-based tourism initiatives provides a starting point for cluster assessment (Embassy of Uzbekistan in China, 2024). In the third stage, six dimensions were selected for the proposed Cluster Competitiveness Assessment Matrix: factor conditions, demand conditions, related and supporting industries, firm strategy and rivalry, institutional coordination, and cluster performance outcomes. These dimensions reflect the theoretical models and are tailored to Uzbekistan’s institutional and economic context.

4. Results

Türkiye’s tourism sector demonstrates strong cluster dynamics in coastal regions, cultural heritage zones, and thermal tourism areas. According to 2023 Trade Map data, Türkiye ranks sixth globally in tourism export revenues and is the most competitive among Spain, Portugal, Malaysia, Morocco, Egypt, Indonesia, Greece, and Italy, which have a medium competitive advantage (Wisdomlib, 2024). Türkiye’s competitiveness in world tourism exports over the period 2010–2023 reflects strong cluster dynamics in regions such as Antalya, Bodrum, Marmaris, Cappadocia, and Pamukkale. Türkiye’s coastal clusters in Antalya and Bodrum benefit from concentrated hotel capacity, airport connectivity, tour operator networks, and beach infrastructure. Cultural heritage clusters in Cappadocia and Pamukkale leverage unique geological and historical assets, specialised guiding services, and boutique accommodation. Thermal tourism clusters in regions such as Afyon and Denizli benefit from natural hot springs, medical tourism facilities, and wellness services. These clusters demonstrate strong factor conditions, demand conditions, related and supporting industries, firm strategy and rivalry, institutional coordination, and cluster performance outcomes. Uzbekistan has begun to develop tourism clusters and tourism-recreational zones as part of its tourism development strategy. The government has identified 135 mahallas (local communities) in 28 districts and cities with high tourist potential in order to develop the service sector by applying a specific approach to each region based on their peculiarities (Embassy of Uzbekistan in China, 2024). Two tourism-recreational zones have been created (Charvak and Zomin), with three more under construction (Shahrisabz, Maydanak, and Okhalik-Okbuyro-Mironkul) (Embassy of Uzbekistan in China, 2024). From the beginning of 2024, Uzbekistan has undertaken various initiatives to bolster its tourism sector, including the launch of new flight routes connecting Uzbekistan with key destinations

(Ilmiyanjumanlar, 2024). Efforts to develop mountain tourism in the Samarkand region and establish tourist centres and shopping areas aim to enhance visitor experiences and diversify tourism offerings (Ilmiyanjumanlar, 2024). After the referendum held in 2023, steady growth in tourism is planned in Uzbekistan, which is due to a number of factors, such as attracting investments, upgrading infrastructure, developing cultural tourism, and improving conditions for business tourism (Scientists.uz, 2023). Despite these advances, Uzbekistan’s clusters are at an early stage of development. Factor conditions such as natural and cultural resources are strong, but created resources such as specialised infrastructure and human capital need further development. Demand conditions are improving with increasing visitor numbers, but seasonality and market diversification remain challenges. Related and supporting industries such as transport, hospitality, and cultural services are developing but lack critical mass in many regions. Firm strategy and rivalry are emerging but require stronger innovation and differentiation. Institutional coordination is improving through tourism-recreational zones and mahalla-based initiatives, but inter-agency coordination and public-private partnerships need strengthening. Cluster performance outcomes such as employment, value-added, and innovation are promising but require systematic measurement. The proposed Cluster Competitiveness Assessment Matrix consists of six dimensions. Each dimension encompasses specific elements that collectively determine cluster competitiveness. This dimension measures the quantity and quality of natural and cultural resources, specialised infrastructure, human capital, and capital resources within the cluster. It includes indicators such as the number and quality of tourism attractions, the availability of specialised accommodation and transport, the skills and training of tourism workers, and the availability of investment capital.

Discussion

The main contribution of this study is the argument that Uzbekistan’s tourism competitiveness should be assessed through the lens of cluster development and cluster dynamics. Türkiye’s experience shows that strong tourism clusters can enhance competitiveness through agglomeration economies, specialised infrastructure, coordinated marketing, and collective action. Türkiye’s rank of sixth globally in tourism export revenues reflects strong cluster dynamics in coastal, cultural, and thermal tourism regions (Wisdomlib, 2024). For Uzbekistan, the first policy implication is the need to strengthen factor conditions within tourism clusters. While natural and cultural resources are strong, created resources such as specialised infrastructure, human capital, and investment capital need further development. The government should invest in cluster-specific infrastructure such as visitor centres, specialised accommodation, transport links, and training facilities. The second implication concerns demand conditions. Uzbekistan should diversify tourism markets, reduce seasonality, and attract sophisticated tourists who demand high-quality experiences. Marketing efforts should target niche segments such as cultural tourism, adventure tourism, gastronomy tourism, and wellness tourism. The third implication relates to related and supporting industries. Uzbekistan should strengthen transport connectivity, hospitality services, cultural and recreational facilities, restaurants and shopping, tour operators and travel agencies, and supporting sectors such as construction and finance. Cluster-based

procurement and supply-chain development can enhance linkages among cluster actors. The fourth implication concerns firm strategy and rivalry. Uzbekistan should encourage innovation and differentiation among tourism enterprises, support the development of leading firms and brands, and foster healthy competition and collaboration within clusters. Business support services, innovation grants, and networking events can enhance firm-level competitiveness.

Conclusion

This article has proposed a cluster-based methodology for assessing the competitiveness of Uzbekistan's tourism sector, drawing on Türkiye's experience with tourism cluster development and Porter's diamond model of competitive advantage. The proposed Cluster Competitiveness Assessment Matrix integrates Porter's diamond model, the Ritchie and Crouch destination competitiveness model, and recent cluster theory applied to tourism. It includes six dimensions: factor conditions, demand conditions, related and supporting industries, firm strategy and rivalry, institutional coordination, and cluster performance outcomes. The analysis shows that Türkiye's relevance for Uzbekistan lies in its strong tourism cluster dynamics, which contribute to its rank of sixth globally in tourism export revenues (Wisdomlib, 2024). Uzbekistan's development of tourism-recreational zones and mahalla-based tourism initiatives provides a foundation for cluster development (Embassy of Uzbekistan in China, 2024). The proposed methodology provides a practical framework for measuring cluster competitiveness and designing targeted policy interventions at regional and sub-regional levels.

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