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ANALYSIS OF THE TRANSFORMATION OF EMPLOYMENT IN THE TOURIST SERVICES MARKET OF UZBEKISTAN AND THE STATE OF ITS REGULATION

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Abstract. Alongside the development of the tourism sector in Uzbekistan, it is becoming one of the key industries in the country's economy. Tourism not only plays an important role in showcasing the country's cultural and natural wealth, but also plays a significant role in creating new jobs. This article analyzes the employment indicators in the tourism services market in Uzbekistan, the current state of their regulation, and the impact of the digital economy on employment to some extent.

Key words: Tourism services, employment indicators, the impact of the digital economy on employment in tourism, labor market, economic development, tourism policy, seasonal employment.

O'ZBEKISTON TURISTIK XIZMATLARI BOZORIDA BANDLIK TRANSFORMATSIYASI TAHLILI VA UNI TARTIBGA SOLISH HOLATI

To'xtayeva Xurshida Farxodovna

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Annotatsiya. O'zbekistonda turizm sohasini rivojlantirish barobarida mamlakat iqtisodiyotining asosiy tarmoqlaridan biriga aylanib bormoqda. Turizm nafaqat mamlakatning madaniy va tabiiy boyliklarini namoyish etishda, balki yangi ish o'rinlari yaratishda ham muhim o'rin tutadi. Ushbu maqolada O'zbekistondagi turizm xizmatlari bozoridagi bandlik ko'rsatkichlari, ularni tartibga solishning hozirgi holati va raqamli iqtisodiyotning ma'lum darajada bandlikka ta'siri tahlil qilinadi.

Kalit so'zlar: Turizm xizmatlari, bandlik ko'rsatkichlari, raqamli iqtisodiyotning turizmga bandlikka ta'siri, mehnat bozori, iqtisodiy rivojlanish, turizm siyosati, mavsumiy bandlik.

АНАЛИЗ ТРАНСФОРМАЦИИ ЗАНЯТОСТИ НА РЫНКЕ ТУРИСТИЧЕСКИХ УСЛУГ УЗБЕКИСТАНА И СОСТОЯНИЯ ЕЕ РЕГУЛИРОВАНИЯ

Тухтаева Хуршида Фарходовна

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Аннотация. Наряду с развитием туристического сектора в Узбекистане, он становится одной из ключевых отраслей экономики страны. Туризм не только играет важную роль в демонстрации культурного и природного богатства страны, но и играет значительную роль в создании новых рабочих мест. В данной статье анализируются показатели занятости на рынке туристических услуг в Узбекистане, текущее состояние их регулирования и в некоторой степени влияние цифровой экономики на занятость.

Ключевые слова: Туристические услуги, показатели занятости, влияние цифровой экономики на занятость в туризме, рынок труда, экономическое развитие, политика в сфере туризма, сезонная занятость.

Introduction

In recent years, tourism in Uzbekistan has been rapidly developing and becoming one of the strategically important sectors of the country's economy. The country's rich cultural and historical heritage, beautiful natural landscapes, and architectural monuments have sparked great interest among international tourists. The development of tourism not only contributes to economic growth but also plays a significant role in creating new jobs. In particular, the impact of the digital economy on the tourism services sector is increasing employment, which greatly helps improve the well-being of the population and supports the sustainable development of society.

This article is dedicated to analyzing employment indicators and the state of regulation in the tourism services market of Uzbekistan. It examines how jobs in the tourism sector are being created, the current state of employment, how its effectiveness is being ensured, as well as the measures being taken by both the government and the private sector in this field. Additionally, the article analyzes the existing challenges and opportunities for improving and regulating employment in the tourism services sector.

The main goal of the article is to study the employment situation in Uzbekistan's tourism services market, assess the effectiveness of reforms in this sector, and provide recommendations for its further development.

Research methodology

In the research, we will analyze data obtained from national statistics, the Tourism Committee's reports, industry news, and previous studies. The analysis will utilize methods such as descriptive statistics, comparative analysis, and thematic analysis.

Research

The tourism services sector in Uzbekistan is considered one of the important branches of the economy. The sector contributes not only to increasing foreign exchange earnings for the country but also significantly to employment for the population. Employment indicators in the tourism sector depend on the following key factors:

1. Direct Employment in the Tourism Sector

In Uzbekistan, the tourism industry has rapidly developed in recent years into one of the strategically important sectors of the national economy. The development of the tourism industry can play a crucial role in enhancing regional economies and realizing their rich natural and cultural potential. According to the new edition of the Tourism Law of the Republic of Uzbekistan, adopted by the Legislative Chamber on April 16, 2019, and approved by the Senate on June 21, 2019, the tourism industry is described as: “a set of accommodation facilities, transportation, public catering facilities, entertainment, educational, business, health-improving, physical education-sports, and other purpose-oriented facilities, organizations conducting tourist activities, organizations providing excursion services, as well as a set of services provided by tour guides, interpreters, and tour leaders.” Tourism is a highly labor-intensive and significant source of employment. It is one of the world’s leading job creators, requiring various skill levels and providing opportunities for quicker employment, especially for youth, women, and labor migrants. In some countries, tourism accounts for a substantial share of employment; for example, India ranks second in job creation in the tourism sector with 25 million jobs. In Uzbekistan, tourism’s contribution to GDP was 10,155.6 billion UZS (3.4% of GDP), with over 380,000 jobs in the sector in 2018 (3.0% of total employment). Tourism encompasses various sectors of the economy, making it challenging to accurately count the number of workers employed in this field. The problem of accurately assessing the number of employees is complicated by the specific characteristics of labor and the various relationships between the tourism sector and other sectors of the economy. A significant portion of labor resources in tourism is absorbed by hotels, restaurants, and transportation enterprises. According to WTO data, serving one foreign tourist creates nearly nine jobs in the home country. Employment statistics show that women make up more than 50% of the workforce in the hotel industry. The number of jobs in tourism is growing 1.5 times faster than in other sectors of the economy. A new job is created in the tourism sector every 2.5 seconds. According to UNWTO data, the number of jobs in Uzbekistan's tourism sector has been increasing year by year; in 2014, over 42,000 people were employed in this sector, and by 2018, this number had reached 50,000. Of these, 47,600 were in hotel and accommodation activities, with the remainder in travel agencies and other service activities. The data shows that, contrary to the global trend, men are employed more than women in the tourism sector in Uzbekistan. (Figure 1)³³.

³³ <https://www.e-unwto.org/doi/epdf/10.5555/unwtotfb0860010020182022202310?role=tab>

UZBEKISTAN

Cod. Basic data and indicators	Notes	Units	2018	2019	2020	2021	2022
1. INBOUND TOURISM							
<i>Data</i>							
Arrivals							
1.1 Total		('000)	5,346	6,749	1,504	1,881	5,233
1.2 ♦ Overnight visitors (tourists)		('000)	..	..	..	..	..
1.3 ♦ Same-day visitors (excursionists)		('000)	..	..	..	..	..
1.4 * of which, cruise passengers		('000)	..	..	..	..	..
Arrivals by region							
1.5 Total		('000)	5,346	6,749	1,504	1,881	5,233
1.6 ♦ Africa		('000)	1	2	0.5	1	2
1.7 ♦ Americas		('000)	14	23	3	8	18
1.8 ♦ East Asia and the Pacific		('000)	90	136	18	13	36
1.9 ♦ Europe		('000)	5,161	6,477	1,453	1,796	5,141
1.10 ♦ Middle East		('000)	5	7	2	5	7
1.11 ♦ South Asia		('000)	74	101	28	58	28
1.12 ♦ Other not classified		('000)	1	2	0.2	0.2	0.3
1.13 * of which, nationals residing abroad		('000)	..	..	..	..	..
Arrivals by main purpose							
1.14 Total		('000)	5,346	6,749	..	..	..
1.15 ♦ Personal		('000)	5,224	6,620	..	..	..
1.16 * holidays, leisure and recreation		('000)	458	1,044	..	..	..
1.17 * other personal purposes		('000)	4,766	5,576	..	..	..
1.18 ♦ Business and professional		('000)	122	128	..	..	..
Arrivals by mode of transport							
1.19 Total		('000)	5,346	6,749	..	..	..
1.20 ♦ Air		('000)	437	657	..	..	..
1.21 ♦ Water		('000)	..	..	..	..	..
1.22 ♦ Land		('000)	4,909	6,092	..	..	..
1.23 * railway		('000)	74	63	..	..	..
1.24 * road		('000)	4,835	6,029	..	..	..
1.25 * others		('000)	..	..	..	..	..
Arrivals by form of organization of the trip							
1.26 Total		('000)	5,345	6,749	..	..	..
1.27 ♦ Package tour		('000)	93	349	..	..	..
1.28 ♦ Other forms		('000)	5,252	6,400	..	..	..
Accommodation							
Total							
1.29 ♦ Guests		('000)	963	1,172	..	..	..
1.30 ♦ Overnights		('000)	2,460	2,525	..	..	..
Hotels and similar establishments							
1.31 ♦ Guests		('000)	938	1,094	..	..	..
1.32 ♦ Overnights		('000)	2,293	2,357	..	..	..
Expenditure							
1.33 Total		US\$ Mn	1,314	1,711	400	722	1,731
1.34 ♦ Travel		US\$ Mn	1,144	1,513	350	596	1,437
1.35 ♦ Passenger transport		US\$ Mn	170	198	50	126	294
Expenditure by main purpose of the trip							
1.36 Total		US\$ Mn	1,144	1,513	350	596	1,437
1.37 ♦ Personal		US\$ Mn	1,132	1,489	306	532	1,330
1.38 ♦ Business and professional		US\$ Mn	12	24	44	63	106
2. DOMESTIC TOURISM							
<i>Data</i>							
Trips							
2.1 Total		('000)	119,094	108,517	..	..	..
2.2 ♦ Overnight visitors (tourists)		('000)	..	..	..	..	..
2.3 ♦ Same-day visitors (excursionists)		('000)	..	..	..	..	..
Trips by main purpose							
2.4 Total		('000)	119,094	108,518	..	..	..
2.5 ♦ Personal		('000)	111,792	106,534	..	..	..
2.6 * holidays, leisure and recreation		('000)	82,880	80,795	..	..	..
2.7 * other personal purposes		('000)	28,912	25,739	..	..	..
2.8 ♦ Business and professional		('000)	7,302	1,984	..	..	..

Figure1. Uzbekistan: Country-specific: Basic indicators for tourism³⁴

³⁴ <https://www.e-unwto.org/doi/epdf/10.5555/unwtotfb0860010020182022202310?role=tab>

Tourism positively impacts the development of various other sectors, including trade, transportation, public catering, and consumer goods production. Key characteristics of labor and employment forms in the tourism sector include:

- A high percentage of part-time workers, temporary workers, and workers from other sectors without specialized training in tourism.
- A large portion of workers lack qualifications (approximately 80%).
- A high number of unqualified youth, women, and informal sector workers.
- An increase in foreign workers on temporary contracts.
- Seasonal fluctuations in employment and workload.
- Variable seasonal wage levels compared to other sectors.
- Long working hours and other factors.

In conclusion, tourism is one of the sectors that creates the most jobs globally. The work carried out by WTO in this field is unparalleled. In our country, recent years have seen significant developments in the tourism sector, leading to observable growth. The development of tourism also stimulates the growth of other sectors.

In the tourism sector, direct employment is mainly observed in hotels, restaurants, tour operators, and guiding services. One distinctive feature of the labor market in the tourism sector in Uzbekistan is that it creates numerous job opportunities for youth and women. Tourism infrastructure, such as hotels and restaurants, plays a crucial role in increasing employment. The qualifications and skills of employees working in this sector directly impact the quality of tourism services.

Table 1

The main indicators of tourism development³⁵

Indicators	2017	2018	2019	2020	2021	2022	2023
Number of tourist companies and organizations, unit	449	502	517	337	288	348	398
Total served, Person	669982	713167	941990	212349	577766	673764	733764

One of the main instruments for developing the tourism sector in our country is the investments being made in this sector. For instance, in 2021, investments totaling 11.4 trillion UZS were allocated for tourism sector projects, with 495 projects implemented. Within the framework of the state investment program, in collaboration with local authorities, 62 projects with a total value of

³⁵ It was developed by the author based on the data of the Statistical Agency under the Resident of the Republic of Uzbekistan

1.2 billion USD were funded, with 562.7 million USD allocated, and 31 projects were completed.

Analysis

In 2023, 735 projects worth a total of 22.1 trillion UZS were launched in the tourism sector, resulting in the creation of nearly 23,000 new jobs in the sector³⁶.

Table 2

Balance of labor resources for January-December 2023³⁷

Region	Average permanent population	Total labor resources	Economically active population	Total Employed population	Number of jobs in the tourism sector	Unemployment rate, %	The ratio of the population employed in tourism to total employment
Republic of Uzbekistan	36 412 359	19 724 906	15 041 970	14 017 901	1 271 553	6,8	9,07
Republic of Karakalpakstan	1 989 449	1 085 495	791 772	735 480	62 402	7,1	8,48
Andijan	3 358 551	1 792 785	1 429 709	1 328 981	107 755	7,0	8,11
Bukhara	2 026 874	1 084 636	858 832	803 230	63 682	6,5	7,93
Jizzakh	1 491 457	800 309	597 384	553 893	52 784	7,3	9,53
Kashkadarya	3 521 476	1 831 368	1 316 567	1 220 121	107 132	7,3	8,78
Navoi	1 065 363	580 372	454 984	426 393	40 880	6,3	9,59
Namangan	3 031 821	1 604 257	1 214 042	1 129 143	99 032	7,0	8,77
Samarkand	4 163 369	2 181 323	1 610 986	1 504 184	123 055	6,6	8,18
Surkhandarya	2 841 782	1 483 263	1 091 807	1 011 178	99 320	7,4	9,82
Syrdarya	905 310	493 830	364 872	338 039	48 327	7,4	14,30
Tashkent	3 022 611	1 628 664	1 329 100	1 238 561	115 257	6,8	9,31
Fergana	4 018 879	2 118 580	1 674 168	1 555 406	147 188	7,1	9,46
Khorezm	1 976 836	1 067 885	831 335	776 468	87 557	6,6	11,28
Tashkent City	2 998 585	1 972 139	1 476 412	1 396 824	117 182	5,4	8,39

The data on labor resources and employment for Uzbekistan projected for 2023 provides insight into the general labor market and the specific role of the tourism sector in various regions. Here is a brief analysis:

³⁶ https://uza.uz/oz/posts/ozbekiston-turizm-sohasi-rivojlanishning-yuksak-bosqichiga-chiqmoqda_529492

³⁷ It was prepared by the author based on the information from the official website of the Tourism Committee of the Republic of Uzbekistan

Among the total economically active population of 15.04 million, 14.02 million are employed, with approximately 1.27 million working in the tourism sector. This indicates that 9.07% of the employed population is engaged in tourism. The national unemployment rate stands at 6.8%.

In terms of regional highlights, the highest tourism employment coefficient is observed in Syrdarya Region, where the tourism sector's share of total employment is 14.30%. This high coefficient is attributed not only to the number of tourism objects in Syrdarya but also to the relatively small total population in the region. Khorezm Region follows with a tourism employment coefficient of 11.28%, indicating a significant dependency of local employment on tourism. The city of Andijan has the lowest tourism employment coefficient at 8.11%.

The highest unemployment rates are found in Surkhandarya and Jizzakh, at 7.4%, while the lowest rate is in Tashkent City at 5.4%. Regions with high tourism employment coefficients, such as Bukhara, Syrdarya, Samarkand, and Khorezm, may have economies more reliant on tourism. However, this also implies that these regions might be more sensitive to fluctuations in tourism demand. There is no direct correlation between high tourism employment and low unemployment rates, suggesting that other economic factors also influence the unemployment levels across regions. The data shows that while tourism is an important sector for employment in Uzbekistan, its impact varies significantly across regions. Regions with higher tourism employment coefficients, such as Syrdarya and Khorezm, demonstrate a stronger dependence on this sector, which could affect economic stability and employment trends in these areas. However, varying unemployment rates across the country indicate the need for a multifaceted approach to address labor market issues.

2. Employment in Directly Related Sectors.

Due to the multiplicative effect of tourism, it helps create jobs in other sectors as well. Specifically, the transport, crafts, trade, and service industries are linked to the development of tourism. For example, transport companies providing services for tourists or producers of handicraft products benefit from tourism, leading to an increase in employment indicators in these sectors.

The provided table details tourism data from 2017 to 2023, including various types of visitations and employment in the tourism sector. The total number of foreign visitors increased significantly, from 2,690,074 in 2017 to 5,703,731 in 2023, with notable fluctuations. In 2020, a significant decline was observed, coinciding with the COVID-19 pandemic, reducing the figure to 1,504,126.

The number of people employed in the tourism sector followed a similar pattern, starting at 244,797 in 2017, rising to 614,115 in 2019, then sharply dropping to 136,875 in 2020 due to the pandemic, but rebounding to 519,040 by 2023.

The number of foreign citizens who came to the Republic of Uzbekistan for tourist purposes in terms of destinations and the number of service providers in the field of tourism (persons)

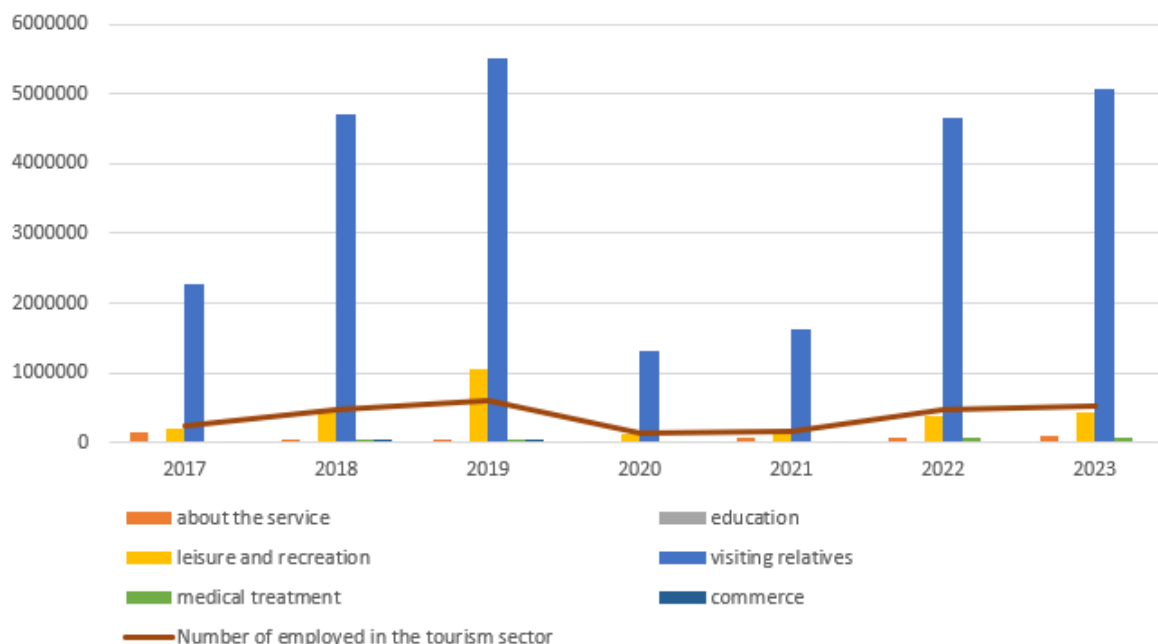


Figure 2. Tourism Statistics and Employment Analysis (2017-2023)

Visitors coming for leisure and recreation saw a dramatic increase from 203,695 in 2017 to 1,043,929 in 2019. Although this number decreased in 2020, it stabilized and reached 427,459 by 2023.

Visitors coming to visit relatives have consistently been the largest group reflecting cultural or social priorities in Uzbekistan, growing from 2,272,346 in 2017 to 5,076,799 in 2023, with a significant decrease in 2020, likely due to COVID-19 restrictions.

Business travel statistics remained relatively stable with a slight increase over the years, from 159,944 in 2017 to 91,333 in 2023 after a decrease in 2020. The number of travelers for medical reasons showed steady growth, starting from 28,705 in 2017 and reaching 76,283 in 2023, with a significant decrease in 2020. These data reflect the severe impact of the pandemic on the tourism sector in Uzbekistan in 2020 and the subsequent recovery in the following years. By 2023, tourism employment and other indicators have largely returned to pre-pandemic levels, indicating a stable recovery in the sector.

In Uzbekistan, the tourism season peaks in spring and autumn. Consequently, seasonal employment is common in various sectors, especially in tourist destinations. Seasonal jobs are created in response to the seasonal demand for tourism services. This employment affects various areas, including

jobs in hotels and restaurants. Additionally, seasonal employment provides work experience for youth and students.

The tourism sector plays a crucial role in creating jobs and providing employment. Employment statistics in the tourism sector include:

Direct Employment: Turoperators, hotels, restaurants, tour guides, and staff at cultural and historical sites, among others.

Indirectly Related Sectors: Companies providing tourism services, handicraft producers, transport companies, etc.

Seasonal Employment: Additional job opportunities created during peak tourism seasons.

To improve employment indicators in this sector, the following measures should be taken:

Training and Skill Development: Enhance the quality and qualifications of tourism sector staff through increased collaboration between the public and private sectors.

Investment in Job Creation: Attract investments aimed at developing hotels, restaurants, and tourism infrastructure.

Improving Seasonal Employment: Expand the tourism season and create year-round job opportunities by developing new tourism products.

In Uzbekistan, the regulation of the tourism services market is carried out through legal, economic, and administrative tools.

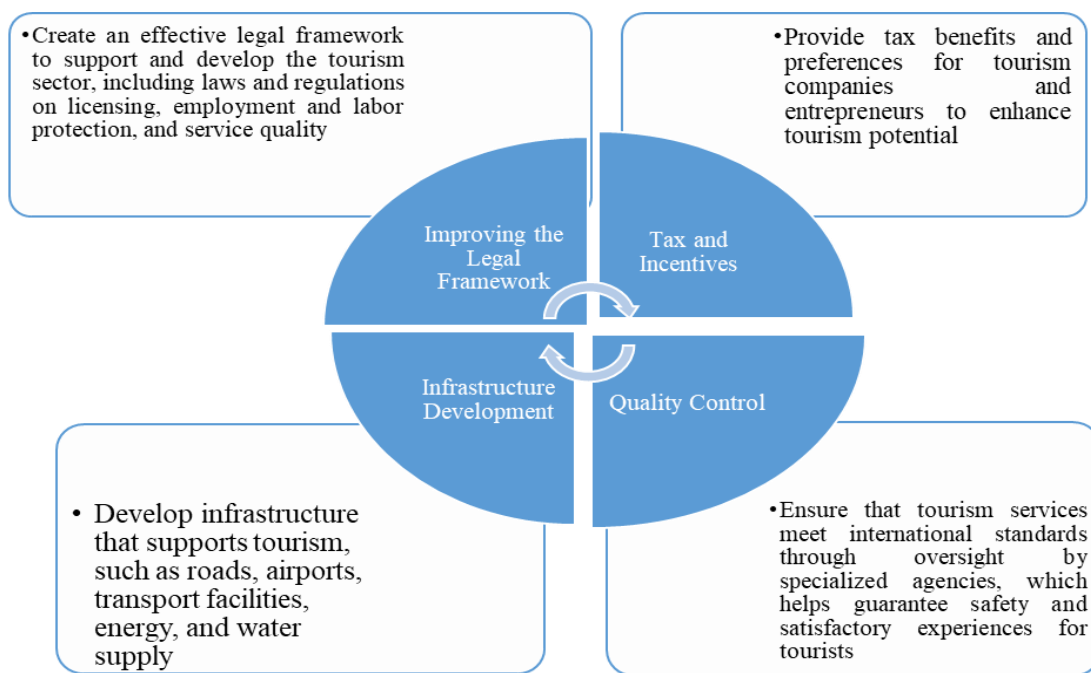


Figure 3. Regulation of the Tourism Services Market³⁸

³⁸ Suggestion made by author

Measures for regulating employment in tourism include:

- Education and Training: Organize special programs and courses for training tourism staff, including engaging youth in professional education and improving their international qualifications.
- Labor Protection: Improve working conditions in the tourism sector, adhere to safety standards, and protect workers' rights.
- Support for Entrepreneurship: Support small and medium-sized enterprises in tourism through grants and loans to create new job opportunities.

As a conclusion we can say that in Uzbekistan, transformational reforms and measures are being implemented to improve employment indicators and the regulation system in the tourism services market. The transformation of employment in the tourism services market and its regulation, linked to the digital economy, not only involves creating new jobs but also ensuring that workers in the tourism sector are equipped with modern digital skills. This process creates opportunities to ensure effective employment in the tourism sector in line with the digital transformation of the country's economy.

These transformational efforts play a significant role not only in supporting economic growth but also in ensuring employment, creating new jobs, and developing the local economy. Cooperation between the public and private sectors, along with efforts to improve infrastructure and staff training, continues to create new opportunities in Uzbekistan's tourism sector.

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