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KEYWORDS	ABSTRACT
tourism governance; decentralization; centralization; Pakistan; Uzbekistan; 18th Amendment; developmental state; fiscal federalism; destination management	Tourism governance is a political economy, institutional design and economic development field. In this paper, the authors have done the comparative study of the management of tourism sector in two nations with diverse modes of governance: Pakistan and Uzbekistan, from 2010 to 2026. After the implementation of 18th Constitutional Amendment (2010) which made the tourism sector the responsibility of four provinces, Pakistan Tourism Development Corporation (PTDC) remained a basket case with lack of any clear mandate for almost ten years. The outcome was disjointed policy, intertwined provincial mandates and the absence of a national tourism brand. By contrast, Uzbekistan made considerable strides to develop tourism as a strategic economic sector in a developmental state framework after President Shavkat Mirziyoyev came to power in December 2016, establishing a new central State Committee for Tourism Development and announcing a gradual stages visa liberalization program. International arrivals in Pakistan have not reached post-2015 levels even after the period of 2016–2019, at around 2 million, compared to Uzbekistan where the arrivals increased from 2 million in 2016 to 6.7 million in 2019 and are projected to grow back to exceed 6.5 million in 2024, despite similar natural and cultural resources. The paper argues, based on Oates's (1972) decentralization theorem, Hall's (2011) typology of tourism governance and political economy by Bramwell (2011), that largely the institutional architecture rather than the resource endowment is the key factor for the performance of tourism in middle-income developing states. Complete decentralization is not necessarily better than complete centralization; the results will depend on whether the design of the constitution can be matched by coordination ability, funding stability and a coordinated national promotion strategy. Finally, the paper profiles a comparative governance assessment framework and offers some policy suggestions relevant to the devolutionary pressures in developing countries.
ARTICLE HISTORY	
Date of Submission: 07-09-2026 Date of Acceptance: 05-10-2026 Date of Publication: 09-10-2026	
	 2026 Journal of Social Research Development
Correspondence	Eyaz Rana
Email:	eyazrana@yahoo.com
DOI	https://doi.org/10.59075/jsrd.v7i8.584
Volume/Issue	7(8), 2026, 278-300

Introduction

One of the more contested areas within development policy is the institutional framework of tourism governance in which public authorities distribute functions, map the inter-sectoral and multi-stakeholder cooperation and deploy tourism sector resources. It is not politically without controversy or obvious to concentrate authority in a national body or to devolve it to sub-national units, and there are trade-offs to consider (Bramwell, 2011; Hall, 2011). It's not just an administrative issue; it has a direct impact on continuity of investment, coherence of destination marketing, standardization of regulation and, of course, visitor numbers and revenue.

A natural experiment can be presented with Pakistan and Uzbekistan. Both are Muslim-majority lower-middle income states with great cultural, historical and natural tourist resources. For a long time, prior to 2010, both countries' tourism was conducted via the state system of centralization – which Pakistan had inherited from colonial administration and Uzbekistan had from Soviet administration. The two states, however, were far apart in the years 2010–2016. In April 2010 the Pakistan government passed the 18th Constitutional Amendment, moving the responsibility for tourism from the Federal Ministry of Tourism and making it a provincial responsibility. Until September 2016, Uzbekistan governed by President Islam Karimov, had a tight grip on tourism with visa restrictions, money exchange rate tightens, and tight border procedures looking at the tourists. While Pakistan failed to make devolutioning work as a mechanism for provincial management, Uzbekistan in 2016 made a clear transition toward a state-led promotional approach to devolution.

The difference is quite pronounced in these empirical data. Between 2016 and 2019 there was an increase in arrivals to Uzbekistan from nearly 2 million to 6.7 million (+235 percent), in three years (World Bank, 2022 and 2023; UN Tourism, 2023). The inbound numbers in Pakistan surged to about 966,000 in 2010 but dipped just above 1.9 million in 2019, but dipped rapidly during the COVID-19 pandemic and were restored to around 1.9 million by 2022 (PTDC, 2022). Given the difference in both size and the growth rate of both, the question that this paper addresses are to what extent does the manner in which tourism is governed in a country, whether centrally or de-centrally, explain its performance, while keeping other factors constant?

This paper is structured as follows. The theoretical literature on governance, decentralization and tourism administration is reviewed in section 2. Therefore, a comparative analytical framework is set up in Section 3. In section 4, details of Pakistan's post-devolution tourism governance will be discussed. In Section 5, Uzbekistan's typical reform path towards centralization after 2016 is analyzed. Section 6 compares the six governance dimensions. The theoretical and policy implications are discussed in Section 7. Section 8 concludes.

Governance, Decentralization, and Tourism: A Theoretical Review

Decentralization as a Governance Concept

Oates (1972) is credited as the founder of conceptual mapping decentralization debates, as he theorized about the efficiency of provision of public goods in relation to local preferences by sub-national governments in his Decentralization Theorem. The theorem is based on the assumption of region-specific differences in preferences and no economies of scale that would suggest a preference for central provision. More recently, Oates (1999) admits that fiscal decentralization is "in vogue" in international policy discussion, and states its advantages are "very context specific," and the theorem holds more strongly for goods that have "spatially circumscribed consumption."

Later work has modified and elaborated on this framework significantly. Using a decentralization mechanism, Rodden (2003) found that it deepened efficiency mostly when there is a high capacity for sub-national (SNG) governments to collect revenue, and where there are mechanisms of accountability. Smoke (2001) highlighted the three aspects of decentralization (political, administrative, and fiscal) and suggested that these three aspects are not necessarily linked; indeed, the failure to link them may lead to less desirable results than centralized alternatives. A primary concern of Bahl and Linn (1992) was that certain obligations are being passed on from one agency to another or transferred from one sector to another without adequate funding, particularly in developing countries.

The decentralization–centralization debate has been studied empirically in a number of contexts in the tourism literature. Yuksel, Bramwell and Yuksel (2005) have investigated the Turkish coastal resort of Belek and have concluded that the decentralization of the resort resulted in a loss of accountability and power struggles between the local government, the management company and a non-governmental organization. Their conclusion that the issues of decentralization in developing countries are not given the attention that they deserve is as true 20 years later as it was then. A team of researchers led by Guccio et al. (2018) carried out a quasi-natural experiment at the regional level in Italy and concluded that the impact of a decentralizing policy on tourism in the regions with the change was negative compared to those without such a policy impact because they performed worse during the period 1995–2010, with results holding across various estimation methods.

From the literature review, Ndivo and Okech (2020) noted that the depth of devolved governance in Kenya's tourist administration posed a multitude of challenges for improving service quality such as lack of mandate clarity, multi-agency coordination and no licensing standardization protocols. The results are consistent from the cases in the developing countries: decentralization is a structure and not a solution, and its effectiveness requires a (pre-existing) institutional capacity at the sub-national level.

Tourism Governance Frameworks

Hall (2011) advanced the influential typology of the distribution of authority between the state, the market, and civil society. There are four governance forms: hierarchies (state-led); markets (private sector led); networks (collaborative forms of governance involving stakeholders); and communities (local and participatory forms of governance). Hall contended that there is no single modality that is superior but that a combination is usually effective in achieving good governance and appropriate to the institutional environment of the destination. Specifically, he has pointed out that the mode selected affects administrative efficiency but also impacts the 'specialization' or the distribution of the benefits of tourism.

Based on strategic-relational state theory, Bramwell (2011) furthered a political economy approach to tourism governance. Governance for Bramwell is not a matter of optimum assignment, but an arena where the actors, with differential power, are in negotiation to shape institutional rules to their benefit. State involvement in tourism is not a neutral managerial decision, it is a reflection of the balance of forces in the political economy, with all decisions, from the regulatory frameworks to the number of investments in the infrastructure, the budgets for tourism promotion to visa policies, all of the above are made according to a particular political-economic balance. The perspective is useful to analyze post-authoritarian transitions such as those of the period following 2016 in Uzbekistan, where institutional preferences not only fulfil political-economic consolidation goals but also fulfil tourism goals.

Bramwell and Lane (2011) emphasized how governance and sustainability research should examine issues of accountability, power distribution and of the political circumstances in which governance is produced. Their framework warns against judging governance performance solely by standards of efficiency; sometimes an 'efficient' centralized state can lead to results which benefit certain politically favored groups of the populace and stifle dissent in regions that attract tourists. In Uzbekistan the tourism reform program is also ongoing and press and civil society freedom are still limited (Eurasianet, 2018).

The public administration literature suggests that the paradigm of the 1990s and 2000s, known as New Public Management (NPM) has been replaced by the NPG paradigm developed by Osborne (2006), which focuses on multi-actor networks and co-production. Both models underestimate the situations discussed in this paper, as the post-devolution provinces of Pakistan do not have the market structure assumed by NPM, and the state in Uzbekistan even demises network governance in favour of a hierarchical order.

Developmental State Theory and Tourism

The path taken by Uzbekistan since 2016 would most closely fit into the concept of a developmental state, which was originally postulated by Johnson (1982) as a process that occurred in Japan and later developed by Evans (1995) for the late industrializing economies in general. The developmental state approach presupposes that the state has a unified, outwardly isolated bureaucracy with the

organizational ability to shape market results in the direction of the industrial policy goal. Not a *laissez-faire* state, nor a Soviet-style command economy, it selectively intervenes in markets through incentives, infrastructure provision and trade policy to reach sectoral targets.

Ersöz (2023) in his research on the tourism governance of Uzbekistan since 2016 explicitly embraces the framework of the developmental state, holding that the Mirziyoyev government applied state mechanisms and measures, such as the National Tourism Authority, presidential decisions as policy instruments, visa reforms and infrastructure development, but did so in a structurally similar way as East Asian developmental states in manufacturing. This is a helpful concept but with the limitations that Leftwich (1995) outlined: developmental states must be politically independent of rent-seekers and be embedded in private sector relations that most post-Soviet states have not fully developed, including Uzbekistan.

A complementary lens is that of the fiscal federalism literature. Oates (1999) *Essay on Fiscal Federalism* recognized that the actual dynamics of decentralization will be shaped by the possibility of a "race to the bottom" or a "sorting of preferences" among sub-national governments. In tourism, in which the product may be a national brand and several destinations are perceived as a single product, sub-national competition may have a negative impact on the overall product (Fyall and Garrod, 2005). This is what Pakistan's journey after 18th amendment is demonstrating.

Analytical Framework and Methodology

Comparative Case Study Design

The paper uses a structured focused comparison (George and Bennett, 2005) of two cases selected with deliberate attention to the 'most similar systems' design: Pakistan and Uzbekistan have a high level of background conditions shared (all two are Muslim-majority societies, have both been subjected to colonial and Soviet institutions, a large cultural and natural heritage asset, both are developing economies, and both have limited legal enforcement by international measures), in which they vary systematically on the critical independent variable: centralization of tourism governance structures (Beach, 2018) from 2010–2026.

The year 2010 was selected as a starting year because of Pakistan's 18th amendment, while 2026 represents the limit of evidence available. The sources of data included were: official government policy documents and presidential/parliamentary decrees; reports by international organizations such as the UNWTO/UN Tourism; World Bank and WTTC; peer-reviewed scholarly literature; quality journalism from the websites of, amongst others, Eurasianet, Dawn and regional policy newspapers; and institutional analysis by Friedrich-Ebert-Stiftung, Pakistan Office, and the Pakistan Business Council.

The paper does not attempt a causal identification, in the econometric sense. A comparison of the two countries cannot distinguish the governance variable from other confounding variables, such as security conditions, exchange rate policies, level of infrastructure investment, and macroeconomic

contexts. The claims made here are therefore those of the context and interactions of governance structure rather than causality, with the processes involved in deciding the choices that were involved in arriving at the differences in outcomes in the cases provided as evidence of how the governance choices made were related to the outcomes.

Six-Dimension Governance Assessment

The analysis is conducted from Hall (2011), Bramwell (2011) and Yuksel et al. (2005) through six governance dimensions:

- (1) Institutional architecture refers to formal institutional structure in relation to tourism authority, such as national, provincial or municipal levels, and their linkages.
- (2) Policy coherence: the consistency and lack of contradiction among the level of governments' tourism policies.
- (3) Funding continuity: the continuity and availability of public funds for tourism infrastructure and promotion.
- (4) Marketing oversees: the capability to create one destination image on the international arena.
- (5) Regulatory standardization: uniform licensing, quality assurance and visitor experience management, balancing the needs of operators, owners and visitors.
- (6) Private sector involvement: the extent of people's willingness to cooperate in tourism-coordinating governance arrangements.

Data and Evidence Standards

In this paper all figures are referred to named, available primary sources notably the World Bank World Development Indicators, the UN Tourism (formerly UNWTO) official statistics, the Pakistan Tourism Development Corporation's Barometer 2022, the Statistics Agency of Uzbekistan and official government documents of both countries. Where figures are contested, or there is only one source available, without any independent evidence, this is indicated. No statistics have been invented or inferred; where there are no data, this itself is considered an analytically relevant result.

Pakistan: Devolution Without Coordination, 2010–2026

The 18th Amendment and Tourism Devolution

On 10 April 2010, the Parliament of Pakistan passed the most significant reform of centre-province relations since 1973 Constitution, which was adopted almost unanimously. It abolished the Concurrent Legislative List that covered federal-provincial shared jurisdiction matters, and transferred its 47 subjects to provincial governments, leaving its powers as residual powers under provincial governments (Khan, 2018, Friedrich-Ebert-Stiftung). One of the devolved subjects was tourism. The Ministry of Tourism was officially abolished in 2011, and for decades, the federal government had been managing the tourism industry (Grokopedia, 2024).

This transformation was to have an institutional basis because of the wider political economy of the amendment. Under Charter of Democracy negotiated in 2006 between two largest opposition parties who opposed the military regime of Musharraf, the 18th amendment gave special focus on provincial autonomy to counter the centralized military and bureaucratic power. These negotiations were not centered on tourism but it was swept up in the devolution wave without any institutional arrangements in place for tourism (Friedrich-Ebert-Stiftung Pakistan Office, 2018).

There were three structural issues that came in quick succession. Firstly, the federal body (Pakistan Tourism Development Corporation, PTDC) which had been responsible for the management and promotion of tourism assets from 1970 onwards without any legal framework to ensure its successor, was not replaced. By 2016 PTDC had been "almost dysfunctional" by its own MD's testimony, with no developmental activity since 2010 and operating at a loss with 272 employees, until it was restructured under the Pakistan Tehreek-e-Insaf government which came into existence after 2018 (Dawn/Vlex, 2021). Second, a recently drafted National Tourism Policy, intended to coordinate the federal and provincial roles in tourism development was shelved, and is unlikely to be at the centre of federal-provincial policy coordination in the future (TDAP Research Report, 2022). Third, the 2010 amendment introduced the idea of transferring responsibility without fiscal transfers being provided to the provinces which were directly related to tourism (Khan, 2018).



Figure 1: Archaeological Site of Butkara 1, Swat, Pakistan (photo: Eyaz Rana 22/03/2026)

Provincial Tourism Governance: Divergent and Uncoordinated

Devolution took place at different times and at different priorities in each of the four provinces of Pakistan. Khyber Pakhtunkhwa (KP) was the first province to launch a provincial tourism policy in March 2015, which was technically assisted by USAID. The KP Tourism Policy 2015-2020 dealt

with adventure, wildlife, and eco-tourism as priority segments and proposed to set up the provincial delivery agency (USAID, 2015) as provincial tourism corporation (TCKP). Since 2019, Punjab has introduced a policy for tourism, and a Tourism Authority has been formed the same year, with 640 new hotels and restaurants registered under the new system (Iqbal Institute of Policy Studies, 2023). In Sindh, the most important concentration of UNESCO World Heritage Sites was Mohenjo-daro which had a Tourism Development Corporation, but no provincial tourism strategy was published for most of the decade. Baluchistan was least resourced and least institutionalized provincial tourism unit during the period having coastline and a rich archaeological legacy.

Being the seat of K2 and most of Pakistan's adventure circuits, the 18th Amendment did not provide clarity on the constitutional status of the region of Gilgit-Baltistan. Tourism regulation in GB have been undertaken under the auspices of its own governance orders, and not as part of a formal provincial system, leaving uncertainty over the legal basis for tourism regulation (Friedrich-Ebert-Stiftung, 2018). It is only in 2018 that Azad Jammu and Kashmir has issued a Tourism Policy.

The net result of this provincial patchwork was just what one might expect from theory of the coordination failure in a decentralized system. The Friedrich-Ebert-Stiftung and Pakistan Institute for Parliamentary Services (2018) position paper pointed out overlapping mandates, duplication in marketing expenditure, two conflicting branding stories of Pakistan tourism, and no common standards for hospitality licensing. The Pakistan Business Council (2024) called for the re-centralization of the tourism authority in the constitution as the only solution and proposed establishment of a National Tourism Authority which will have the cross-provincial mandate and budget.



Figure 2: Basho Valley Skardu, Pakistan (photo: Eyaz Rana 06/04/2025)

The PTDC's Contested Position

The governance failure was summarized at a miniature level between 2010 and 2024 in PTDC. Prior to 2010 it operated 35 motels and 4 restaurants nationwide and was the main promotional arm of the federal government. After devolution, its functions were unclear as tourism became a provincial matter, PTDC being a Federal body under the Cabinet Division. The corporation has been operating in a legal limbo for eight years, without it being formally disbanded nor formally redirected, and with its properties becoming dilapidated over time, as well as its budget being reduced (National Assembly Questions 2016). When a restructuring by the government in 2021 made PTDC part of the newly established National Tourism Coordination Board (NTCB), the corporation had losses of 10 years. The mandate for the PTDC was, per a Cabinet Committee on State Owned Enterprises resolution in 2024, restricted to national and international branding and inter-governmental co-ordination and all service delivery was handed over to the provinces comprising a resolution made fourteen years after the amendment that created the issue (The News, 2024).

Arrival Data and Performance Outcomes

Poor governance is evident in Pakistan's inbound tourism data. The number of international arrivals recorded was some 924,000 in 2013 and in 2019 it reached the pre-pandemic peak with 1.9 million arrivals (PTDC Barometer, 2022). As per the 2022 Travel and Tourism Development Index by World Tourism and Travel Council (WTTC), Pakistan's tourism branding and promotion was found indexed at 125th place out of 402 dimensions, which is directly linked with the lack of unity and coordination in tourism marketing across Pakistan (Iqbal Institute of Policy Studies, 2023). While domestic tourism has made a contribution of 5.9 per cent to GDP in 2022, and about 4.2 million jobs in 2022, the numbers hide the asymmetry, as most of the growth was achieved due to domestic tourism (especially within KP and Gilgit-Baltistan) whereas international tourism was significantly low as compared to its stated potential in Pakistan (Al-Salihah Journal, 2025).

Table 1. Pakistan International Tourist Arrivals, Selected Years

Year	Arrivals (thousands)	Key Governance Event
2010	907	18th Amendment passed; Ministry of Tourism dissolved
2013	924	PTDC in operational limbo; no national tourism policy
2015	1,057	KP releases first provincial tourism policy
2019	1,900	Punjab Tourism Policy; COVID-19 follows in 2020
2022	1,910	PTDC restructured; NTCB established
2024	~2,100*	Cabinet approves PTDC mandate revision

Sources: PTDC Tourism Barometer 2022; World Tourism Organization (UN Tourism); *estimate based on available trend data.

Uzbekistan: Centralized Reform and Rapid Ascent, 2010–2026

Tourism Under Karimov: Centralized but Suppressed

Before 2016 the development of tourism in Uzbekistan was a lesson in how centralization can lead to stagnation as well as development. During Islam Karimov's reign (1989–2016), the state had a holistic control of the tourism sector, but not from a developmental perspective, but from a security and political one. Visa procedures were particularly cumbersome in Central Asia it takes three to four hours to get a visa, and luggage, laptops, and mobile phones are carefully inspected (AFAR Magazine, 2018). Public services and buildings, government buildings, railway stations, and other infrastructural elements were legally prohibited from being photographed. An official exchange rate that was disconnected from the black-market rate skewed currency valuations and led to the country's inaccessibility for budget travelers who used legal avenues (Eurasianet, 2018). The results were inevitable and the number of tourists in Uzbekistan in 2016 was about 2 million, mainly nationals of neighboring countries of the CIS, and a small number who came in groups as cultural tourists from Western Europe, Japan and South Korea, although in 2016 the city of Samarkand, Bukhara and Khiva remain the most intact cities of the Silk Road, as old as ancient Rome. Though income per room stay was low, average stays were brief and the role of the tourism sector in the GDP was still at 3.2 percent (WTTC, as cited by Eurasianet, 2018). Centralization under Karimov did not serve as a developmental state but rather as a control mechanism, where tourism was used as a tool for fulfilling security tasks. In this year a large number of Pakistani tourist visit Uzbekistan also.



Figure 3: The Old City of Bukhara, Uzbekistan (photo by: Eyaz Rana 18/05/2026)

The 2016 Transition and Institutional Reform

After taking over the presidency in December 2016, Mirziyoyev instigated a rapid and systematic policy change. On 2 December 2016, he signed Decree No. PF-4861 "On Measures to Ensure the Accelerated Development of the Tourism Sector of the Republic of Uzbekistan", which gave the tourism sector the status of a "strategic sector" of the national economy with real institutional consequences in the developmental state model (Zenodo, 2025; Uzbek Embassy India, 2018). Part of the decree established the State Committee of the Republic of Uzbekistan for Tourism Development as the main state authority that would have jurisdiction over the development of the infrastructure in the sector, international promotion, licensing and cooperation with the private sector.

There was a chain of institutional and regulatory decisions that, taken together, altered in three years the operating environment of tourism. Another presidential decree in February 2018 reorganized the National Tourism Promotion Center into a National PR Center and made a point of connecting promotional strategy with its coordination role by a State Committee. In July 2018 Mirziyoyev signed an e-visa system for 51 countries – including the United States and Canada – and also a transit visa-free procedure for 101 countries (UN Uzbekistan Mission, 2018). Starting from February 2019, 45 countries have been granted 30-day visa-free entry, such as most of the European countries (Eurasianet, 2019; Lifestyle Inquirer, 2019). At the same time, the currency restrictions were removed in 2017, leading to the unification of the exchange rate and to a regular exchange of currency among tourists, and the service providers (Eurasianet, 2018).

The information on visas liberalized gives a clear indication of the impact of policy. The number of arrivals doubled between 2017 and 2018 only, when the e-visa was launched, from about 2.7 million to 5.3 million (AFAR/Tourism Central Asia, various). The official count has been updated to 6.7 million in 2019 (World Development Indicators, The World Bank/UN Tourism). This increase was not exclusively due to visa reform; infrastructure investments and the expansion of airline routes played a part as well as an active international promotion campaign. But the sequence of policy execution – decree, institutional creation, visa liberalization, currency reform, PR reconfiguration – demonstrates the cohesive and quick governance of a centralized system which is structurally impossible in a decentralized system.



Figure 4. Registon Ansambli Samarkand, Uzbekistan (photo: Shahnoza Xajiabdullayeva 16/05/2026)

Institutional Instability Within the Centralized Model

In organizational terms, centralization did not bring about institutional stability. The tourism governance body suffered from at least five reorganizations from the State Committee for Tourism Development to the Ministry of Tourism and Cultural Heritage in April 2021, to the Ministry of Tourism and Sports in 2022 and further reorganizations in 2023 and in November 2025 (Zenodo, 2025). This is a typical "reshuffle" in a developmental state where the political leadership have direct influence over institutional design, and are able to quickly reorganize if given performance signals or political priorities.

In contrast, the course of the policy changed but not in the sense of any of the restructurings. The main scope of the Ministry of Tourism and Cultural Heritage (established in April 2021) remained the same as in the 2016 decree: to adopt a unified state tourism policy, to market the country's tourism internationally, to manage the country's heritage assets, and to ensure the quality of tourism products (Wikipedia, Ministry of Tourism and Cultural Heritage). Presidential decrees retained their status as the main policy initiative: Decree No. 582 (2024) assigned tasks for industrial, geological, scientific, and 'governance tourism' categories and discussed negotiations with international payment platforms such as PayPal and AliPay (Kun.uz, 2025). The continuity of such requirements through organizational reorientation also highlights the fact that Uzbekistan's centralized system puts the power in the hands of the President rather than in particular institutional mechanisms which is inherently agile, but also lacks continuity.



Figure 5: Tashkent, Uzbekistan (Photo: Eyaz Rana 21/05/2026)

Arrival Data and Performance Outcomes

The statistical record clearly reflects Uzbekistan's course since 2016. Although the number of arrivals was around 2 million during the Karimov era, it has increased over recent years, reaching 2.7 million

in 2017, 5.3 million in 2018 and 6.7 million in 2019 (World Bank; Tourism Central Asia, 2023). In 2020, they were reduced to about 1.5 million, but their recovery rate was high: 5.7 million people arrived in Uzbekistan in 2022 and 6.6 million in 2023 (Uzbekistan.travel, 2023; State Committee of Uzbekistan for Tourism Development, 2024). So far 6.5 million visitors were registered at the first ten months of 2024, which is more by 17.2 per cent compared to the same period of 2023 (Times of Central Asia, 2024). According to the UN Tourism data, Uzbekistan ranked among the seven fastest-growing markets in the world in the first nine months of 2025, with the number of arrivals being 73 percent higher than in 2019, the year before the pandemic. (Reinventage.org, 2025)

The revenue numbers are less impressive. The total contribution of tourism to GDP in 2023 was USD 2.14 billion, accounting for 2.35 per cent of GDP (Times of Central Asia 2024). There is variation in measurement as the State Committee has reported 3.3 percent (Tourism Sustainability, ResearchGate, 2025). The average expenditure per tourist (REPA) for the early 2020s as published by Tourism Sustainability, ResearchGate, is USD 391, which illustrates the low spending power of the visitors from the region, against high spenders, mainly tourists from Western countries. The post-2026 challenge is to move from the level of arrivals to the value of each visit for Uzbekistan, which is a challenge for central government to be able to solve by product diversification – and not a visa liberalization tool that got the initial surge of visitors.

Table 2. Uzbekistan International Tourist Arrivals, Selected Years (millions)

Year	Arrivals (millions)	Key Governance Event
2016	2.0	Karimov dies; Mirziyoyev decrees tourism as strategic sector
2017	2.7	State Committee for Tourism established; currency unified
2018	5.3	E-visa for 51 countries introduced; 7 countries visa-free
2019	6.7	45 countries receive visa-free entry; peak pre-pandemic year
2020	~1.5	COVID-19 pandemic; all tourism suspended globally
2022	5.7	Post-pandemic recovery; Ministry restructured
2023	6.6	Samarkand hosts UNWTO General Assembly
2024 (Jan–Oct)	6.5	Continued growth; +17.2% year-on-year

Sources: World Bank World Development Indicators; UN Tourism; Uzbekistan State Committee for Tourism Development (2024); Tourism Central Asia (2023).

Comparative Analysis Across Six Governance Dimensions

Institutional Architecture

Post 2010 institutional framework is multi-level and fragmented in Pakistan. Institutional power resides with four provincial tourism departments as well as the semi-devolved regions of Gilgit-Baltistan and AJK with a small residual federalist PTDC—with its non-executive NTCB coordination board. The responsibility of the tourism performance in Pakistan in international markets is not entrusted to any particular body. Uzbekistan, on the other hand, has a single national

body, which has consistently been renamed in recent years and to which everything is reported, right to the presidency. The architectural contrast is not just organizational but it affects who will be liable for tourism results and who will have the power to take binding decisions across sectors.

Policy Coherence

As of today, 2026, Pakistan does not have a national tourism strategy. As the policy devolved from the federal to provincial level, the 2010 draft National Tourism Policy was dropped, and each province has its own policy either formulated in 2015 (KP), 2019 (Punjab), or 2018 (AJK) with few Provincial level linkages. The 2022 TDAP research report indicated that there is no synergy between the federal and province governments' tourism divisions. Since the decree was issued in December 2016, Uzbekistan has been working in a stable strategic plan, as the objectives foreseen in the original decree and those in subsequent ones are the same, despite a series of institutional changes. The new tourism typologies, integration with payment system, and product development targets are contained in Decree No. 582 (2024) which maintains policy continuity which the provincial governments of Pakistan have failed to achieve.

Funding Continuity

During the next ten years after 2010, Pakistan's PTDC never received any developmental funding and its resources were used up on operational expenses and salary bills of its staff (National Assembly 2016). There was a wide disparity in provincial allocations for tourism; KP has allocated PKR 1.32bn in its budget 2014-15 (Brecorder, 2014) and Balochistan did not have any comparable ring-fenced allocation for tourism. The World Bank has funded the Tourism for Economic Growth Project in Punjab since 2020 but it did not involve a commitment of funding in the budget, rather it was a one-off injection. In the other hand, investment projects were implemented in 2021-22 in Samarkand region on the amount of 7.18 trillion soums and in 2021 only 100+ billion soums were directed to development of heritage infrastructure in Uzbekistan (Samarkand Regional Government, 2022). Presidential decrees set infrastructure standards that mandated rather than encouraged.

National Branding Capacity

The governance fragmentation directly affects Pakistan's score globally on the WTTC index (Iqbal Institute of Policy Studies, 2023) in tourism branding and promotion which has been rated at 125th position. With no single national brand campaign commissioning authority to set the budget, and no consistency in how the campaign is managed across provinces, there is no cumulative national image, confusing the messages! The products of KP (adventure tourism), Punjab (Mughal heritage), GB (Karakoram) are compatible and need federal coordination to market them as a package. The campaign 'Salam Pakistan' for 2023 was a belated national-level branding attempt by PTDC with limited budget and reach within the country. The Uzbekistan's National PR Center under the State Committee has implemented coordinated campaigns, where the Silk Road has become a key bait, using the name of hosting the UNWTO General Assembly in the city of Samarkand in 2023.

Regulatory Standardization

Quality ranges widely in Pakistan due to the provincial hospitality regulation. Hotel and restaurant licensing and registration in the province of Punjab has moved to the online stage; KP is under the Tourism Corporation; the licensing and registration system in Sindh and Baluchistan is less developed. For international tourists, who often visit more than a single province, the quality variation has an effect of diminishers. Quality variation has a negative effect on quality variation for international tourists who are likely to spend time in several provinces. Authorities in Uzbekistan have a centralized system of licensing and inspection under State Committee, which does not ensure uniformity of quality, however, at least there is a single legal basis by which services can be licensed and assessed. The government has taken steps to adopt international hotel classification standards, which would require central authority to adhere to it in a uniform manner.



Figure 6: Chakwal Canyons, Chakwal, Pakistan (Photo: Eyaz Rana 27/07/2026)

Private Sector Engagement

There is a private sector engagement gap in both countries, but for different structural reasons. Privatization of the country's 58 motels and landholding by PTDC, announced in 2021, was planned to bring in private investment but is yet to gain much momentum (Dawn, 2021). In 2017 alone the State Committee supported 118 new tourism businesses in Uzbekistan, 60 of which were in the hotel service, and 58 in the tour operation service (Uzbek Embassy India, 2018); the e-visa system also provided the legal and institutional environment for international tour operators to market the

destination. But Uzbekistan's internal critics cite evidence that demonstrates that the centralized approach has a tendency to exclude rather than involve the private sector. According to the website Kun.uz (2025), there are also issues with government bodies aligning on their strategies and developing budget procedures that harmonize them, particularly with regard to industrial tourism, the use of new payment platforms and governance tourism, where the private sector was either not included in delivery mechanisms or implementation continues to be inconsistent.

Table 3. Comparative Governance Assessment — Pakistan and Uzbekistan, 2010–2026

Governance Dimension	Pakistan (2010–2026)	Uzbekistan (2010–2026)
Institutional Architecture	Fragmented multi-level; no single national authority	Centralized national body; presidential decree as policy tool
Policy Coherence	No national strategy; provincial policies misaligned	Consistent strategic framework through institutional reshuffling
Funding Continuity	Unfunded mandates; PTDC dysfunctional for a decade	Sustained presidential-directed investment; large regional allocations
National Branding Capacity	Ranked 125th (WTTC); fragmented sub-national campaigns	Unified Silk Road brand; UNWTO Assembly hosted in Samarkand 2023
Regulatory Standardization	Provincial inconsistency; no shared licensing framework	Single national framework; international classification being adopted
Private Sector Engagement	Slow PPP development; PTDC privatization incomplete	Rapid new enterprise growth (118 in 2017); implementation gaps persist
International Arrivals (2019)	1.9 million (peak pre-pandemic)	6.7 million (peak pre-pandemic)
International Arrivals (2023)	~2.0 million	6.6 million

Sources: See body of text. WTTC = World Travel and Tourism Council; PPP = public–private partnership.

Discussion: Governance Structure, Context, and Policy Implications

The Limits of Devolution Without Coordination Capacity

The findings of our experience confirm a specific conditionally stated principle of Oates (1972), that sub-national delivery of tourism related public goods is efficient only when provinces have the institutional competence and financial capacity, as well as horizontal co-ordination arrangements to act on their mandate. For Pakistan, none of the three conditions are met in 2010 and only partially in 2026. The authority of the tourism was reduced to a political void.

This reading is upheld by the lessons from comparative cases. The problems of devolution in the Kenyan tourism sector were structurally similar to those identified in Ndivo and Okech (2020): mandate overlap, lack of coordination mechanisms and lack of capacities at sub-national level failed to deliver locally responsive and nationally coherent governance, a “parkour” result. However, overlapping evidence from the Italian regions, between 1995 and 2010, indicates that policy decentralization did not enhance the tourism performance of regions; in fact, it was shown to have decreased it, thus providing mixed support for an optimistic prior of good performance of decentralizing the tourism policy (Guccio et al. 2018).

The unfunded mandate problem of Bahl and Linn (1992) is also peculiar in the case of Pakistan. There was no corresponding provision of dedicated resources to support the devolution of responsibility as stipulated under the 18th Amendment in the field of tourism. This left tourism budgets as a claim on the provincial finances rather than a political priority for investment—except for KP where the strong political incentive of the PTI government for adventure tourism in the north meant the budget was prioritized with a few caveats.

Centralization as a Developmental State Tool in Uzbekistan

Bramwell's (2011) approach to political economy is more useful than just administrative efficiency issues to explain Uzbekistan's development since 2016. The centralization of the tourism authority was not a solution to a failure of coordination, rather a symptom of the overall post Karimov political economy of orientation towards the legitimacy, which the new presidency was trying to achieve through tangible economic reform. Tourism was an industry where the reform credentials could be made visible and where growth in visitor numbers could be achieved quickly and easily; visa liberalization resulted in clear and demonstrable growth of arrivals within months, whereas investment in manufacturing or technology took a longer term than these in tourism and yielded less visible dividends.

This matches the developmental state analysis presented by Ersöz (2023) where the tourism policy employed state instruments such as decree authority, a national body, unified promotion budget, unification of currencies and targeted change in legislation in a sequence that required for speedy and visible effect. Similarly, the five changes to the governing body between 2018 and 2025 do not contradict this reading, but rather are a continuation of the development of the form of the presidency to fit the policy agenda a characteristic of developmental states in which shaping the form of government is not constitutionally limited.

But the drawbacks of the centralized approach are also starting to show in Uzbekistan. The revenue per visitor is low (early 2020s USD 391) given the volume of visitors, the product mix is dominated by tourism services related to cultural heritage tourism, where the length of stay is short and the spending is limited, and there appears to be a disconnection between the presidential decision and the delivery of services as a result of the investigation of implementation gaps (Kun.uz, 2025). These are exactly the symptoms that the NPG literature (Osborne, 2006; Bramwell and Lane, 2011) have

identified as the ones that result from a governance system which avoids multi-actor coordination and relies on hierarchical command.

Neither Model Is Self-Sufficient

The crux of the paper is not that centralization is generally superior to decentralization when it comes to tourism governance; the evidence from Italy (as provided by Guccio et al. 2018) and the Turkish evidence (as provided by Yuksel et al. 2005) is not of this kind. The argument is that the results of both models rely on the existence of a model that fits the institutional setting in which it is applied.

The failure of devolution in Pakistan was due to several reasons, including insufficient institutional capacity in the provinces, inadequate production of public goods and infrastructure in the provinces, lack of coordination, and no policy coordination mechanism to replace the one provided by the federal government for tourism cooperation. The centralization of control for Uzbekistan has been effective in terms of tourists arrivals given the high level of presidential control, the modest opposition and the limited non-infrastructure hurdles to arrival (visas, currency restrictions).

Omara and Tauda (2023) provide a better perspective for governance design in Pakistan, the “functional asymmetrical decentralization”, where the various functions of tourism are better placed at different levels of governance. The national branding, international marketing, visa policy and airline route negotiation are clearly national functions while accommodation licensing, cultural heritage site management and community tourism development are clearly local. All of these functions were lumped together under 18th amendment and it was just a matter of transferring them; a more constitutently structured framework would have allowed for keeping all the national functions at the federal level while truly devolved to local levels.

Security and External Conditions as Confounders

It may be prudent to concede that the security element is one confounder in any kind of comparison between Pakistan and Uzbekistan. Since the events of 9/11, the security environment in Pakistan has had a significant impact on the travel experience, particularly during the highs of the Taliban insurgency in KP & FATA from 2007 to 2014, and in recent years when Western governments have issued various travel advisories, resulting in the closure of the international market for leisure travel. The reasons for these security conditions are not linked to the quality of governance, but are an independent variable that negatively affected demand, irrespective of provincial and federal policy quality.

Compared to Uzbekistan, which has prospered during this post Karimov era of regional stability, the Uzbek population has seen only a fleeting glimpse of the “alternative” heritage tourism along a route to China that the Central Asian Silk Road provides, and that, whatever the truth of the matter, is exempt from the turmoil of the Middle East. The idea is for governance not to be irrelevant – Pakistan’s recovery to 1.9 million arrivals in 2019, after strengthening security measures and raising awareness about northern Pakistan’s landscapes with social media, proves that the demand is there

and it can be met depending on the circumstances. The point is, governance has an impact on the likelihood of meeting a country's latent demand with actual arrivals and revenues, as well as on the sector's ability to withstand any uptick in external conditions.

Conclusion

The policy experiments in the governance of tourism were structural ones which sent contrasting messages between 2010 and 2026 between Pakistan and Uzbekistan. The devolution that Pakistan has witnessed was constitutionally far-reaching and politically well-intentioned, dismantling the institutional framework of the national tourism administration without providing for any alternatives in the provinces. For 10 years, the PTDC languished over development mandate and insufficient budget; provincial strategies did not align; national branding failed; and international arrivals would not reach pre-pandemic levels despite some of the most amazing natural and cultural assets in the world.

The centralization model that was instantaneously launched in Uzbekistan triggered by a political transition and not a constitutional change, aimed at country's institutional development, promotion of the country and a package of visa liberalization and currency reform and was under direct presidential command. International arrivals increased from 2 million in 2016 to 6.7 million in 2019 and have risen since then, which Pakistan has not yet managed to match. The centralized model is also costly: small participant voice from the private sector, lack of implementation between the decree and the delivery and a low income per visit. However, during the time period in question the governance design appealed to Uzbekistan's advantage over Pakistan is clear.

This comparative analysis brings to the fore three specific contributions. Devolution of tourism without a residual national coordinating body and a province mandate with funding, as well as with a lack of a process for inter-province harmonization creates governance that is failing on a national level and simultaneously on a local level. There are unequivocal documents of this failure in Pakistan in the post 2010 literature. Second, if the context is one of developmental state, then tourism governance can bring about quick growth in numbers but there are structural limits on how to maximize revenue and diversify products even in the face of hierarchical coordination, without involving the private sector and civil society in decision making. Thirdly, the dichotomy between central and decentral governance is misleading; the functions of tourism are multi-scalar, meaning that the design of the tourism governance must harmonize the level of government with the level of government best suited to perform the function; with explicit mechanisms for coordination with the other level concerned.

The findings for Pakistan, in particular, back the idea of a constitutional instrument or a parliamentary law establishing a National Tourism Authority with federal powers, with a separate funding source and with inter-provincial coordination powers; but without altering the real devolution of powers in other areas as provided by the 18th Amendment. From the findings, it can be said that the next stage of reform of Uzbekistan's governance should involve increased private sector

involvement, and establish the continuity of the bureaucracy, which has been lacking in the policy instruments of the presidency.

Future studies should explore whether the conditional argument proposed here has general validity for a larger number of developing-country tourism markets that are experiencing devolutionary reform but do not have existing institutional capacity. The informational content of the governance-performance relationship identified here is partially tested in the cases of Kenya (Ndivo and Okech, 2020) and Indonesia (Omara and Tauda, 2023); a systematic cross-national analysis of ten or more countries over similar time spans would further enhance the inferential support for the relationship explored here.

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