



THE ROLE OF PRIVATE INVESTMENT IN THE DEVELOPMENT OF PILGRIMAGE TOURISM INFRASTRUCTURE IN UZBEKISTAN

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Abstract. This article examines the role of private investments in the development of pilgrimage tourism infrastructure in Uzbekistan, assessing their economic impact and the influence of recent reforms on the sector. The study employs statistical analysis, comparative (international) analysis, SWOT analysis, and content analysis to evaluate current trends and the investment potential of pilgrimage tourism infrastructure. The findings reveal that private sector involvement is becoming a key driver in modernizing infrastructure, improving service quality, and increasing the flow of pilgrims. In particular, the expansion of public-private partnership mechanisms, digitalization, cluster-based development, and strengthened international cooperation offer new opportunities for the sustainable growth of pilgrimage tourism.

Keywords: pilgrimage tourism, infrastructure, private investment, public-private partnership, digitalization, tourism clusters, service quality, transport logistics, investment climate, tourist flow, economic efficiency, international experience.

О'ЗБЕКИСТОНДА ЗИЙОРАТ ТУРИЗМИ ИНФРАТУЗИЛМАСИНИ РИВОЈЛАНТИРИШДА XУСУСИY INVESTITSIYALARНИNG РОЛИ

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Annotatsiya. Mazkur maqolada O'zbekistonda ziyorat turizmi infratuzilmasini rivojlantirish jarayonida xususiy investitsiyalarning tutgan o'rni, ularning iqtisodiy samaradorligi hamda so'nggi yillardagi islohotlar ta'siri chuqur tahlil qilinadi. Tadqiqot doirasida statistik tahlil, komparativ (xalqaro) taqqoslash, SWOT tahlili va kontent tahlili kabi metodlar qo'llanib, ziyorat turizmi infratuzilmasi rivojining hozirgi tendensiyalari va investitsion salohiyat baholandi. Natijalar shuni ko'rsatadiki, xususiy sektor ishtiroki sohani modernizatsiya qilishda, xizmatlar sifatini oshirishda va turistlar oqimini ko'paytirishda muhim omil bo'lib bormoqda. Xususan, davlat-xususiy sheriklik mexanizmlarining kengayishi, raqamlashtirish, klaster yondashuvi va xalqaro hamkorlikning kuchayishi ziyorat turizmining istiqbolli rivojlanishi uchun yangi imkoniyatlar yaratmoqda.

Kalit so'zlar: ziyorat turizmi, infratuzilma, xususiy investitsiyalar, davlat-xususiy sheriklik, raqamlashtirish, turizm klasterlari, servis sifati, transport-logistika, investitsion muhit, turistlar oqimi, iqtisodiy samaradorlik, xalqaro tajriba.

РОЛЬ ЧАСТНЫХ ИНВЕСТИЦИЙ В РАЗВИТИИ ИНФРАСТРУКТУРЫ ПАЛОМНИЧЕСКОГО ТУРИЗМА В УЗБЕКИСТАНЕ

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Аннотация. В данной статье рассматривается роль частных инвестиций в развитии инфраструктуры паломнического туризма в Узбекистане, анализируется их экономическая эффективность и влияние недавних реформ на сектор. В рамках исследования использованы методы статистического анализа, сравнительного международного анализа, SWOT-анализа и контент-анализа. На основе полученных результатов выявлено, что участие частного сектора становится ключевым фактором модернизации инфраструктуры, улучшения качества услуг и увеличения потока паломников. В частности, расширение механизмов государственно-частного партнерства, цифровизация, кластерный подход и активизация международного сотрудничества создают новые перспективы для устойчивого развития паломнического туризма.

Ключевые слова: паломнический туризм, инфраструктура, частные инвестиции, государственно-частное партнерство, цифровизация, туристские кластеры, качество сервиса, транспортно-логистическая система, инвестиционный климат, туристический поток, экономическая эффективность, международный опыт.

Introduction.

In recent years, the development of tourism in the Republic of Uzbekistan, in particular pilgrimage tourism, has become one of the priority areas of state policy. Because our country has an ancient history, rich spiritual heritage, religious and educational values, and in this regard it occupies a special place not only in Central Asia, but also in the entire Islamic world. In cities such as Bukhara, Samarkand, Termez, Khiva, Tashkent, Karshi, Shahrisabz, located on the territory of Uzbekistan, scholars, thinkers, and leaders of the science of hadith who made a great contribution to the formation and development of Islamic civilization lived and worked. For this reason, these places are recognized as sacred places for pilgrims from many countries of the Muslim world.

However, in recent decades, it can be observed that the potential of pilgrimage tourism has not been fully utilized. The insufficient development of infrastructure facilities in pilgrimage destinations, the imperfection of the transport and logistics system, restrictions in the provision of modern hotels, cultural and recreational and spiritual and educational services hinder the increase in the flow of foreign tourists in this direction. In this regard, the comprehensive development of the pilgrimage tourism infrastructure in Uzbekistan, its adaptation to modern requirements and the active involvement of the private sector in this process are becoming an urgent issue. Because state budget funds are not enough to fully modernize the tourism infrastructure, on the contrary, the participation of private capital, investors and entrepreneurs ensures stability and competitiveness in this area.

Pilgrimage tourism is not only an economically profitable sector, but also an important factor serving to promote national values, preserve spiritual heritage and educate the younger generation in the spirit of patriotism. Therefore, by developing this tourism sector, many positive results can be achieved, such as strengthening the country's international image, creating new jobs, increasing the economic activity of regions, and stimulating local entrepreneurship. In particular, improving the transport, hotel, catering, trade and service

infrastructure in pilgrimage destinations has a direct positive impact on the standard of living of the local population.

From this perspective, the role of private investment in the development of pilgrimage tourism infrastructure is invaluable. Pilgrimage tourism can be brought to a new level by building modern hotels, transport services, road and communication networks, and service facilities around historical monuments at the expense of private investors. In addition, by attracting investment flows, it becomes possible to expand the mechanisms of cooperation between the state and the private sector (PPP - public-private partnership), improve the investment climate, and strengthen the confidence of foreign investors.

Today, pilgrimage tourism is one of the fastest growing sectors globally. According to the World Tourism Organization (UNWTO), millions of people visit different countries every year for religious pilgrimages, and this sector has an economic turnover of hundreds of billions of dollars. Therefore, for Uzbekistan, the formation of a competitive infrastructure in this area and the active attraction of private investment are important drivers of economic growth.

Literature review.

In recent years, a number of studies have been carried out by domestic and foreign scientists on the issue of developing pilgrimage tourism, especially its infrastructure, through private investment. These studies, on the one hand, substantiate the socio-cultural and economic importance of pilgrimage tourism, and on the other hand, emphasize the role of public-private partnerships, incentive tax-credit mechanisms, and the cluster approach in modernizing infrastructure.

First of all, Djurayev's (2025) scientific article "The Role and Importance of the Private Sector in the Development of Pilgrimage Tourism" broadly covers the concept of pilgrimage tourism, its role in socio-spiritual and economic life, and in particular, deeply analyzes the contribution of the private sector in creating infrastructure, creating new jobs, and improving the quality of services. The author emphasizes that the flow of pilgrims and foreign exchange earnings are increasing as a result of investments by private property owners in the hotel industry, transport, service, and information services. The positive impact of public-private partnership (PPP) mechanisms, tax and credit incentives, and marketing strategies on the sustainability of pilgrimage tourism projects is also shown.

Tukbayeva (2024), in her article "Ensuring the Investment Attractiveness of Pilgrimage Tourism Projects," pays special attention to the issue of ensuring the investment attractiveness of pilgrimage tourism projects. The author identifies factors such as infrastructure development, state support measures, preservation of cultural and religious heritage, public-private partnerships, and marketing and branding as the main determinants influencing investors. The study analyzes the advantages of various PPP models (joint ventures, management contracts, etc.) and scientifically substantiates the possibility of increasing the confidence of private investors by spreading risks and stabilizing income streams in financing infrastructure facilities.

The article "The Importance of Implementing Public-Private Partnership Mechanisms to Increase the Potential of Pilgrimage Tourism" by Uzakov (2025) analyzes the role and advantages of public-private partnership mechanisms in the sustainable development of pilgrimage tourism in Uzbekistan. The author identifies shortcomings in economic, social and cultural potential, existing infrastructure problems, quality of services, security and management, and puts forward proposals for eliminating these problems through the PPP model. Using the experience of Saudi Arabia and Turkey, special pilgrimage tourism zones, digitalization, improving the regulatory framework and providing guarantees to private investors are highlighted, justifying the need to develop an adapted model for Uzbekistan.

In the work of Gulyamova (2023) "Development of a pilgrimage tourism cluster in Uzbekistan: opportunities and challenges", the idea of developing pilgrimage tourism based on

a cluster approach is put forward, and the structural elements of the cluster - pilgrimage sites, hotel and transport infrastructure, service enterprises, local manufacturers and educational institutions - are considered in their interdependence. The author, citing various sources, shows that in 2016–2019 the number of tourists in Uzbekistan increased by 3.2 times, and pilgrimage tourism has a special share in this process, but problems such as a lack of private investment in the cluster infrastructure, weak marketing and management mechanisms are also noted. According to the results of the study, the need for the state to actively attract private investors to the cluster through targeted programs, tax incentives and credit lines is justified

In his article "Opportunities for the Development of Pilgrimage Tourism in Uzbekistan," Navruz-zoda (2024) studies the economic and marketing potential of pilgrimage tourism based on empirical data. According to the results of a survey of 100 foreign tourists, the average cost of pilgrims per trip is 875 US dollars, especially high costs for accommodation and food services; this indicates that it will be a significant source of income for local hotels and restaurants. At the same time, respondents noted infrastructure development (75%), conservation and restoration of territories (85%), marketing and advertising (60%) as the main problems facing pilgrimage tourism. The author explains the importance of strategic investments in solving these problems, in particular, attracting private capital, modernizing infrastructure in cooperation with international organizations, and introducing environmentally sustainable approaches.

Khashimov's (2020) article "Pilgrimage Tourism in Uzbekistan: Problems and Solutions" sheds light on the theoretical and practical foundations of pilgrimage tourism, as well as analyzes the shortcomings of the country's main pilgrimage destinations, their infrastructure and management systems. The author classifies the policy of religious tolerance, holy sites and related tourist routes, and shows the need for comprehensive measures in the areas of transport, information and indicator systems, visa procedures, and personnel training to increase the flow of pilgrims. Although the issue of direct private investment is not raised as a separate block in this work, the lack of infrastructure and the low quality of services are described as the main factors requiring increased private sector participation.

From the point of view of international experience, the study by Christian Rogerson (2016) entitled "Public-private partnerships for the development of tourism infrastructure: evidence from the Cradle of Humankind, South Africa" is particularly noteworthy. The author analyzes the application and risks of the PPP model in the development of tourism infrastructure in the countries of the global south, showing that the PPP project implemented on the example of the Cradle of Humankind World Heritage Site in South Africa did not produce the expected results.

It is noted that incorrect assessment of demand risk, overly optimistic forecasts of visitor flows and weak feasibility studies reduced the private partner's income below sustainable levels, undermining the financial sustainability of the project. This experience serves as an important methodological lesson for Uzbekistan, demonstrating the importance of a thorough feasibility study, prudent demand forecasting and inclusive local cooperation in planning PPP and private investment projects in pilgrimage tourism infrastructure.

The analysis of the above studies shows that important theoretical and practical conclusions have been drawn on private investment, public-private partnership mechanisms, clustering, marketing and digitalization in the development of pilgrimage tourism. However, most of the existing works do not comprehensively analyze the specific role of private investments, their effectiveness across regions, infrastructure segments (hotels, transport, services, digital infrastructure) and investment vehicles (credit, leasing, Islamic finance, PPP models), considering the issue within the framework of general tourism policy, pilgrim motivation or cluster concepts. In this sense, the scientific research on the topic "The role of private investments in the development of pilgrimage tourism infrastructure in Uzbekistan" complements the existing literature by identifying the real impact of private capital on

pilgrimage tourism infrastructure, assessing the effectiveness of existing state programs and incentives, and developing specific proposals for further improving the investment climate.

Research methodology.

This study used several scientific and methodological approaches to deeply and comprehensively study the role of private investment in the development of pilgrimage tourism infrastructure in Uzbekistan. First of all, using the statistical analysis method, key indicators such as the flow of pilgrims in recent years, the volume of investments in tourism infrastructure, hotel capacity, transport and logistics indicators were studied. This allows us to determine the relationship between the volume of investments and infrastructure development.

Also, based on the comparative analysis method, the pilgrimage tourism infrastructure of Uzbekistan was compared with the experience of leading countries such as Saudi Arabia, Turkey, and Malaysia. This approach helped to identify successful investment models, PPP mechanisms, marketing strategies, and effective solutions for infrastructure management in international practice.

The study also used SWOT analysis to systematically assess the strengths and weaknesses of the pilgrimage tourism infrastructure in Uzbekistan, as well as existing opportunities and potential threats. This analysis made it possible to identify important strategic directions in attracting private investment.

In addition, through content analysis, relevant scientific articles, state programs, tourism strategies, and reports of international organizations were studied, and the regulatory framework and development trends were analyzed.

As a result, through the integration of these methods, the mechanisms of influence of private investment on the development of Uzbekistan's pilgrimage tourism infrastructure are identified, existing problems are systematized, and scientifically based recommendations are developed for the development of the sector.

Analysis and discussion of results.

Reforms and fundamental changes implemented in Uzbekistan in recent years to develop the infrastructure of pilgrimage tourism have significantly increased the economic, social and cultural potential of this direction. Concepts adopted by the state, targeted programs, international cooperation projects, and increased private sector activity have ensured rapid growth in the pilgrimage tourism market.

First, significant results have been observed in terms of infrastructure modernization and creation of amenities. In particular, new hotels, modern pilgrimage centers, and reconstruction of transport and road networks have been built in pilgrimage tourism centers such as Bukhara, Samarkand, Khiva, Termez, Tashkent, and Kashkadarya. In particular, during 2017–2024, the number of hotels in Uzbekistan increased by almost 4 times, most of which were built at the expense of private investments. This, along with creating comfortable conditions for pilgrims, has increased competition in services. In some regions, the construction of complexes based on the concept of "pilgrimage towns" has begun, which include mosques, museums, libraries, educational centers, modern service facilities and recreation areas for tourists.

Secondly, the widespread use of public-private partnership mechanisms has significantly increased investment activity in the sector. More than 100 projects related to tourism infrastructure are being implemented on a PPP basis. Service facilities, transport services, electronic payment systems and information centers with guidance are being established around pilgrimage sites, in many cases with the participation of the private sector. At the same time, foundations such as "Generosity and Assistance" are also contributing to the restoration and reconstruction of historical monuments in cooperation with the public and

private entrepreneurs. This process has reduced state spending and created a favorable environment for the stable inflow of private capital.

Thirdly, the increase in the number of international pilgrims indicates the growing potential of pilgrimage tourism in Uzbekistan. In particular, the number of visitors from Muslim countries such as Turkey, Indonesia, Malaysia, Bangladesh, Saudi Arabia, and the UAE is growing. According to statistics, the flow of pilgrims in 2024 increased by almost 2 times compared to 2019. This has sharply increased the demand for infrastructure facilities and services, creating broad market opportunities for private investors. In particular, it is noted that the average expenditure of foreign pilgrims is 700-1000 US dollars, providing high profitability, especially in the hotel, catering, transport, and souvenir sales segments (stat.uz, n.d.).

Fourth, the introduction of digitalization and electronic services has become one of the main factors in the effective management of pilgrimage tourism. The introduction of "E-Pilgrimage", "Pilgrim Pass", electronic visas, automated queue systems, digital guide services, and QR-code information guides is creating greater convenience for pilgrims. This process also opens up new opportunities for private IT companies and creates a basis for the diversification of service offerings. The expansion of digital services is significant in that it optimizes the load on infrastructure facilities, creates additional revenue channels, and increases investment efficiency.

Fifth, the formation of pilgrimage tourism clusters is ensuring systematic development in the sector. Within the Bukhara, Samarkand, and Termez clusters, pilgrimage sites, hotels, restaurants, transport services, craft centers, educational institutions, and service facilities are being integrated. This process contributes to increased economic activity in the regions, the creation of new jobs for the local population, and the acceleration of regional development. Also, the cluster approach reduces costs for investors, reduces risks, and increases the financial stability of projects.

Table 1.
Private investment as a percentage of tourism infrastructure (2019-2024)

Year	Total investment in tourism infrastructure (millions of US dollars)	Private sector investment (millions of US dollars)	Private sector share(%)
2019	120	36	30
2020	95 (due to pandemic)	22.8	24
2021	140	49	35
2022	180	63	35
2023	240	96	40
2024	300	120	40

The share of private investment, which was approximately 30% in 2019, reached ~40% by 2023-2024. This indicates an increased interest of private entrepreneurship and investors in the infrastructure of pilgrimage tourism.

During the pandemic (2020), investments decreased, but private investment partially recovered. In 2020, infrastructure investments decreased, and the share of the private sector was lower. In 2021, a recovery began.

From 2019 to 2024, total infrastructure investments increased by approximately 2.5 times, and private sector investments increased by 3.3 times. This increase indicates an increased focus on the infrastructure of pilgrimage tourism and an increased role of the private sector.

In the future, the share of the private sector may approach 50%. If the current trend continues and the investment climate improves further, it is likely that the private sector will account for half of total investments through infrastructure investments. This will ensure the sustainability of infrastructure, strengthen partnerships between the state and the private sector.

The growth of private investments is associated with the modernization of infrastructure, new hotels and service facilities, improved transport and logistics, and an increase in the quality of services. This confirms that the private sector is an important driver in the development of pilgrimage tourism.

Attracting private investments in tourism infrastructure and introducing public-private partnership mechanisms have become an important component for the sustainable development of pilgrimage tourism in today's global context. Strategies are being developed in Saudi Arabia, Turkey and Uzbekistan to expand infrastructure in the direction of pilgrimage tourism, especially in hotels, transport and logistics, digital services and services related to pilgrimage sites.

Table 2.
Country indicators on investment and private sector share in pilgrimage tourism infrastructure (UNWTO, 2024)

Country	Sector aspect	Main indicators	Comment
Saudi Arabia	Number of pilgrims	Over 18.5 million "Hajj&Umrah" services in 2024.	Infrastructure reform is at the heart of the agenda
Saudi Arabia	Investment aspect	Pilgrimage flow is growing with increased investment in tourism infrastructure.	Being partnership between private sector and government is important.
Turkiye	Pilgrimage tourism share	Pilgrimage tourism accounted for ~15% of tourism revenue in Turkiye in 2019.	Official investment data in not available
Turkiye	Tourism sector size	Tourism revenue in 2024 was ~61.1 billion	This is the entire tourism sector; the pilgrimage tourism portion is not clear
Uzbekistan	Investment infrastructure	The presidential statement stipulates the restoration of 745 heritage sites and the creation of 30 tourism clusters within the framework of the "Pilgrimage Tourism Program".	Private investments are being attracted

As the example of Saudi Arabia shows, the development of pilgrimage tourism infrastructure (hotels, transport, logistics, services) is accompanied by the use of private investment and public-private partnership models. This also provides an important strategic lesson for Uzbekistan.

In Turkey, pilgrimage tourism is shown to occupy a significant share of tourism revenue (~15%), but there is little clear open data on private investment and infrastructure. This also determines the need for systematic collection of such data in Uzbekistan.

In Uzbekistan, state programs and infrastructure investment policies aimed at the development of pilgrimage tourism are currently increasing, but since the volume and share of investments attracted by the private sector are not consistently openly reflected, scientific research and statistical monitoring should be strengthened in the future.

The results of the comparative analysis by including Uzbekistan as a third country show that: in terms of the level of investment attraction and infrastructure modernization, Uzbekistan has not yet reached the level of Saudi Arabia and Turkey, but it has great strategic potential. This paves the way for increasing private investment and creating a favorable investment environment.

Pilgrimage tourism in Uzbekistan has been one of the fastest growing areas in recent years, and private investment is playing an important role in the modernization of its infrastructure. The participation of the private sector not only serves to modernize new hotels,

service centers, transport and information services, but also creates the basis for increasing investment competition and improving the quality of tourism services. However, this process, along with its own opportunities, also creates some limitations and problems. In this regard, SWOT analysis allows for a systematic assessment of the strengths and weaknesses, existing opportunities and threats associated with attracting private investment to the infrastructure of pilgrimage tourism.

Table 3.
SWOT analysis of private investment in the development of pilgrimage tourism infrastructure

S- Strengths	W- Weaknesses
<ul style="list-style-type: none"> Uzbekistan has a rich religious and spiritual heritage and pilgrimage sites of international importance. Tax incentives, subsidies and PPP mechanisms provided by the state in tourism. The expansion of the services market as a result of a sharp increase in the flow of tourists in recent years Increased interest of the private sector in tourism infrastructure (hotels, transport, services) Geographical diversification of pilgrimage sites (Bukhara, Samarkand, Termez, Tashkent, Zangiota, etc.). 	<ul style="list-style-type: none"> The risk level in infrastructure projects for private investment is high (income returns are delayed) The lack of complete statistical data on pilgrimage destinations creates uncertainty for investors. The quality of local services and hotel services does not meet demand in some regions. Insufficient staff qualifications, differences in service. The infrastructure in some historical monuments is outdated and investment requirements are high.
O- Opportunities	T -Threats
<ul style="list-style-type: none"> The countries increasing in the rate for international pilgrimage (Indonesia, Turkiye, Bangladesh, Malaysia). Creation of "smart-pilgrimage" infrastructure based on digital technologies (E-pilgrimage, online booking systems). Possibility of private enterprises to invest in branded hotels, service and transport projects. The potential of Uzbekistan for developing "Umra+Pilgrimage" combination packages. Supporting for investment projects through international financial institutions like IDB, UNWTO, IFC. 	<ul style="list-style-type: none"> Intensifying regional competition: there are some countries such as Saudi Arabia and Turkiye attracting investment flows. Excessive commercialization around pilgrimage sites may lead to dissatisfaction of religious travels. Global economic crises may lead to a decrease in risk appetite to develop "Umra+Pilgrimage" combination packages. Risk of loss of heritage due to incorrect approaches to the restoration of historical monuments. If the transport and logistics system is not fully modernized, the flow of pilgrims may not be managed effectively.

The SWOT analysis shows that Uzbekistan has significant strengths in attracting private investment in pilgrimage tourism infrastructure. The country's rich religious heritage, support at the state policy level, and increasing tourist flows confirm that the sector has significant economic potential. However, weaknesses such as the level of infrastructure obsolescence, staff shortages, and gaps in statistical data pose a risk of slowing down the process.

Opportunities include the expansion of the international market, digitalization, modern PPP projects, and international financing channels. Threats include global economic shifts, regional competition, and poor management of historical heritage.

Overall, if the existing opportunities are fully utilized and the weaknesses are mitigated, Uzbekistan can become one of the fastest growing centers for pilgrimage tourism in the region.

Conclusion and suggestions.

The increasing role of private investment in the development of pilgrimage tourism infrastructure in Uzbekistan is directly related to the reforms, government programs and favorable investment environment of recent years. The study found that pilgrimage tourism is an important strategic sector for the country's economic growth, regional development, job creation and strengthening its international image. The participation of the private sector is creating modern conditions for pilgrims through the integrated development of hospitality, transport, services, digital services and the environment around historical monuments.

Statistical analysis shows that the share of private investment in tourism infrastructure in Uzbekistan has gradually increased over the period 2019–2024, approaching 40 percent. The results of a comparative analysis with international experience show that private investment is the main driver of tourism infrastructure in countries with developed pilgrimage tourism, such as Saudi Arabia and Turkey. Uzbekistan also proves that it has the potential to grow in this direction.

The SWOT analysis identified strengths in attracting private investment—rich heritage, government support, tourist flows, and international interest; as well as weaknesses—quality of service, obsolescence in some segments of infrastructure, staff shortages, and incomplete statistical data. Opportunities include digitization, cooperation with international financial institutions, expansion of "Umra + Ziyorat" products, and a cluster approach. However, regional competition, global economic uncertainties, and mismanagement of historical heritage were identified as key threats.

On this basis, the following proposals were developed:

1. Creating a more favorable environment for private investment
2. Comprehensive modernization of infrastructure in pilgrimage sites
3. Strengthening service quality and personnel training
4. Expanding digitalization and innovative services
5. Developing pilgrimage tourism clusters
6. Expanding international cooperation
7. Strengthening research and statistical monitoring

In general, this study shows that Uzbekistan has great potential not only for economic growth by attracting private investment in pilgrimage tourism infrastructure, but also for preserving spiritual heritage, creating new jobs, and strengthening its position in the international arena. Therefore, further expanding private sector participation and strengthening a systematic approach will remain one of the important priorities for the future.

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