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MICRO-LEVEL DETERMINANTS OF TOURISM-ENTERPRISE COMPETITIVENESS IN UZBEKISTAN: ACCOMMODATION QUALITY STRUCTURE AND THE SERVICE-INFRASTRUCTURE GAP

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Abstract. Macro-level competitiveness indices identify weak tourist-services infrastructure as a binding constraint on Uzbekistan's competitiveness, but they do not reveal its micro-level origin in the structure and quality of the enterprise base. This study examines the accommodation and intermediation enterprise structure across the thirteen regions of Uzbekistan, focusing on hotel quality certification, the upscale segment, and the operator-agent composition of the travel trade. The central finding is a pervasive quality-certification deficit: only 7 percent of the country's hotels hold any star classification, and four- and five-star properties are confined almost entirely to three heritage regions. Quality-classified supply is strongly and positively associated with inbound demand across regions ($r = 0.82$), and the regions that have developed an upscale, certified segment are precisely those that capture the largest international flows. The analysis interprets the macro-level tourist-services deficit as the aggregate expression of a micro-level enterprise-quality gap, and argues that quality certification, upscale-segment development and a stronger outbound-tour-operator base are the enterprise-level levers most likely to raise Uzbekistan's service-infrastructure competitiveness.

Keywords: *tourism enterprise; accommodation quality; star classification; micro-competitiveness; service infrastructure; Uzbekistan*

1. Introduction

National competitiveness indices are aggregations of enterprise-level realities. When such an index records a destination as weak on tourist-services infrastructure, that aggregate weakness is the sum of decisions and capabilities at the level of individual hotels, tour operators and travel agents. To understand - and to remedy - a macro-level service deficit therefore requires descending to the micro level at which tourism services are actually produced. This paper makes that descent for Uzbekistan, whose tourist-services and infrastructure pillar ranks among its weakest in global assessments.

The focus is the structure and quality of the tourism-enterprise base across Uzbekistan's thirteen regions, along three dimensions: the quality certification of the accommodation stock, captured by star classification; the presence of an upscale segment, captured by four- and five-star properties; and the composition of the travel trade, captured by the balance between tour operators and travel agents. These dimensions are

chosen because they are the micro-level correlates of the service quality that macro indices measure, and because they are directly addressable by enterprise policy.

2. Literature review

The enterprise level has a definite place in the destination-competitiveness frameworks of Ritchie and Crouch [1] and Dwyer and Kim [2], in which the quality of supporting services and the capability of the tourism firms that deliver them mediate the conversion of resources into visitor value. Cracolici and Nijkamp [3] showed, at the regional scale, that micro-based indicators of the tourism supply are essential to explaining destination attractiveness and competitiveness, establishing the relevance of enterprise-level structure to competitive outcomes. The present study operationalizes this insight through the quality structure of the accommodation sector.

A second strand concerns service quality and performance at the firm level. Assaf and Josiassen [4]'s frontier and determinant analyses demonstrate that the efficiency and quality of tourism enterprises, not their mere quantity, separate high from low performers, while Gooroochurn and Sugiyarto [5] and Mendola and Volo [6] treat service quality and infrastructure as distinct competitiveness components requiring micro-level measurement. The smart-services agenda of Gretzel and colleagues [7] further locates competitiveness in the service capabilities of individual enterprises. This literature motivates the present focus on certification and the upscale segment as observable proxies for enterprise quality.

A third strand links supply structure to demand. The infrastructure-demand evidence of Khadaroo and Seetanah [8] and Seetanah and Khadaroo [9], and the competitiveness-performance findings of Uyar and colleagues [10] and Pavlukovic and colleagues [11], establish that the quantity and quality of tourism supply condition realized flows. Building on this, the present paper tests whether quality-classified accommodation supply is associated with inbound demand across Uzbek regions, extending the predominantly macro evidence to the micro, enterprise-structure scale that has not previously been examined for Uzbekistan.

3. Materials and methods

3.1. Data

The analysis uses enterprise-structure data for the thirteen administrative regions of Uzbekistan and the national total. For accommodation, the data record the number of hotels and their distribution across two-, three-, four- and five-star classifications, together with capacity. For the travel trade, the data record the number of tour operators and travel agents. Inbound demand is measured by the number of foreign tourists received by each region. The dataset thus captures both the quality structure of the accommodation base and the composition of the intermediation sector.

3.2. Measures

Three enterprise-quality measures are constructed for each region. The quality-certification rate is the share of hotels holding any star classification, classified hotels divided by total hotels. The upscale indicator is the count of four- and five-star properties, capturing the presence of an internationally competitive top segment. The intermediation

composition is the ratio of tour operators to travel agents, distinguishing regions whose travel trade is oriented toward product creation from those oriented toward distribution. The association between quality-classified supply and inbound demand is then assessed by correlation across regions.

3.3. Interpretation

The analysis is descriptive and cross-sectional, and the supply-demand association is interpreted as a structural correlation rather than a causal effect, since quality supply and demand are plausibly co-determined. The value of the exercise lies in characterizing the micro-level structure that underlies the macro-level service deficit and in identifying the enterprise dimensions on which that structure is weakest.

4. Results

4.1. The quality-certification deficit

The headline finding is a pervasive quality-certification deficit. Nationally, of roughly 1098 hotels only 74 - about 7 percent - hold any star classification, leaving the overwhelming majority of the accommodation stock outside any recognized quality framework. Figure 2 shows that this deficit is near-universal across regions: most regions have classification rates in the low single digits or zero, and only a handful exceed the national average. For an international visitor, the practical consequence is an accommodation market in which quality is largely unsignalled, a direct micro-level source of the weak tourist-services performance recorded at the macro level.

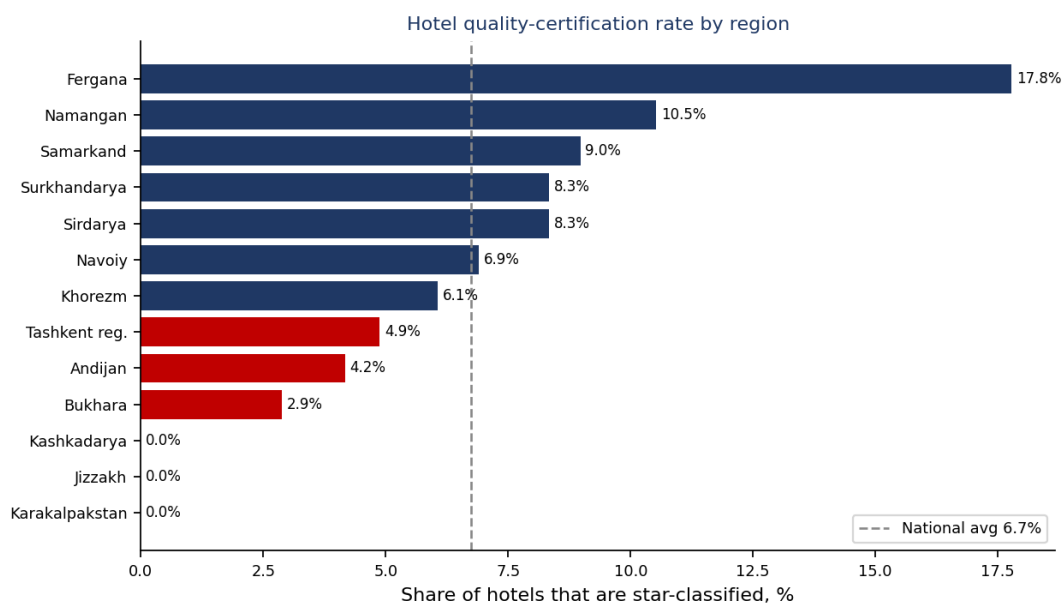


Figure 1. Share of hotels that are star-classified, by region; the dashed line is the national average.

4.2. The concentration of the upscale segment

The upscale segment is not merely small but spatially concentrated. As Figure 2 shows, four- and five-star properties are confined almost entirely to Samarkand, Bukhara and Khorezm - the heritage core - while the great majority of regions have none. Star-classified accommodation of any grade is similarly concentrated, with Samarkand and

Bukhara accounting for a disproportionate share of the national total. The implication is a two-tier accommodation geography: a thin layer of internationally graded supply in a few heritage cities, and an unclassified, quality-unsignalled base everywhere else.

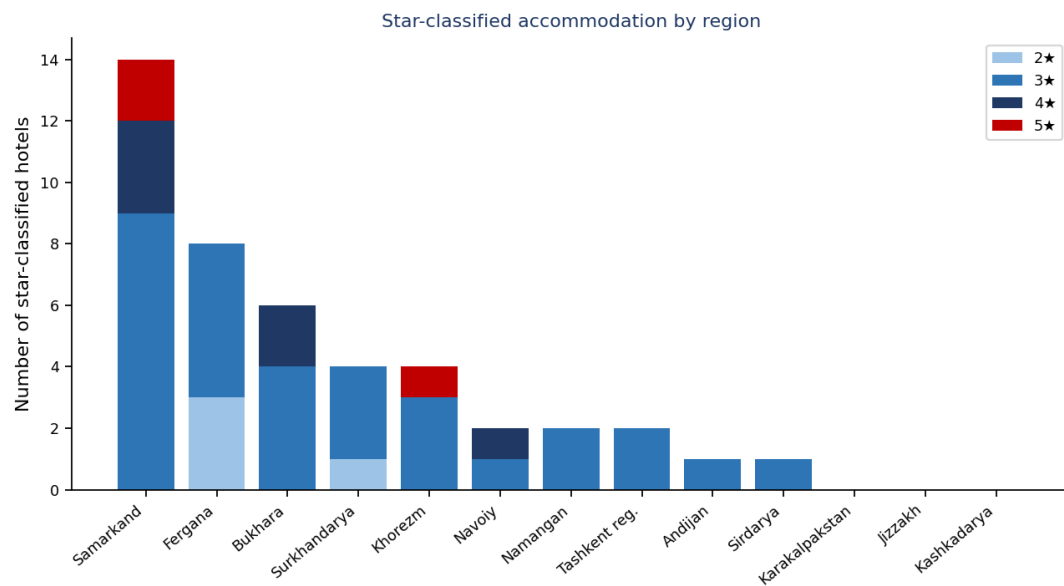


Figure 2. Distribution of star-classified hotels (2-5 star) by region.

Table 1. Enterprise structure and inbound demand by region.

Region	Hotels	Classified	4-5★	Class. %	Operators	Agents	Foreign(000)
Samarkand	156	14	5	9.0%	316	74	2758
Bukhara	208	6	2	2.9%	176	10	1745
Khorezm	66	4	1	6.1%	93	55	1137
Tashkent reg.	41	2	0	4.9%	124	42	1104
Surkhandarya	48	4	0	8.3%	51	11	712
Namangan	19	2	0	10.5%	115	3	634
Kashkadarya	43	0	0	0.0%	30	18	563
Andijan	24	1	0	4.2%	58	110	500
Fergana	45	8	0	17.8%	92	13	476
Jizzakh	28	0	0	0.0%	29	18	452
Navoiy	29	2	1	6.9%	68	4	420
Karakalpakstan	27	0	0	0.0%	67	13	200
Sirdarya	12	1	0	8.3%	21	8	114

4.3. Quality supply and inbound demand

Figure 3 relates the count of star-classified hotels to inbound demand across regions. The association is positive and strong: the regions that have developed a certified, quality-signalled accommodation segment - Samarkand, Bukhara, Khorezm - are precisely those that capture the largest international flows, while regions with no classified supply receive correspondingly modest inbound numbers. Although the cross-sectional design

cannot separate cause from effect, the pattern is consistent with quality certification functioning as both a response to and an enabler of international demand, and it identifies the certified segment as the demand-relevant part of the accommodation base.

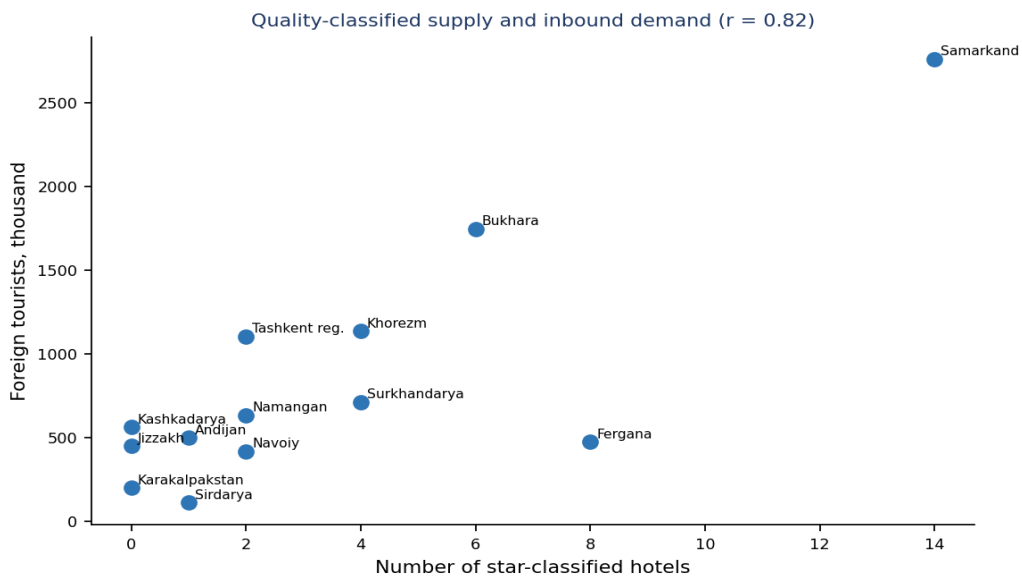


Figure 3. Star-classified hotels and foreign-tourist numbers across regions.

4.4. The intermediation base

The travel trade is dominated by tour operators over travel agents nationally - about 2650 operators to 1036 agents - but Figure 4 shows that this composition varies markedly across regions. Samarkand and the heritage regions combine large operator bases with developed agent networks, whereas several regions have very thin intermediation sectors of either type. A developed operator base is the enterprise capability that assembles and markets destination products to international markets, so its uneven distribution compounds the accommodation-quality deficit: regions weak in both certified supply and product-creating intermediation face a double micro-level constraint on competitiveness.

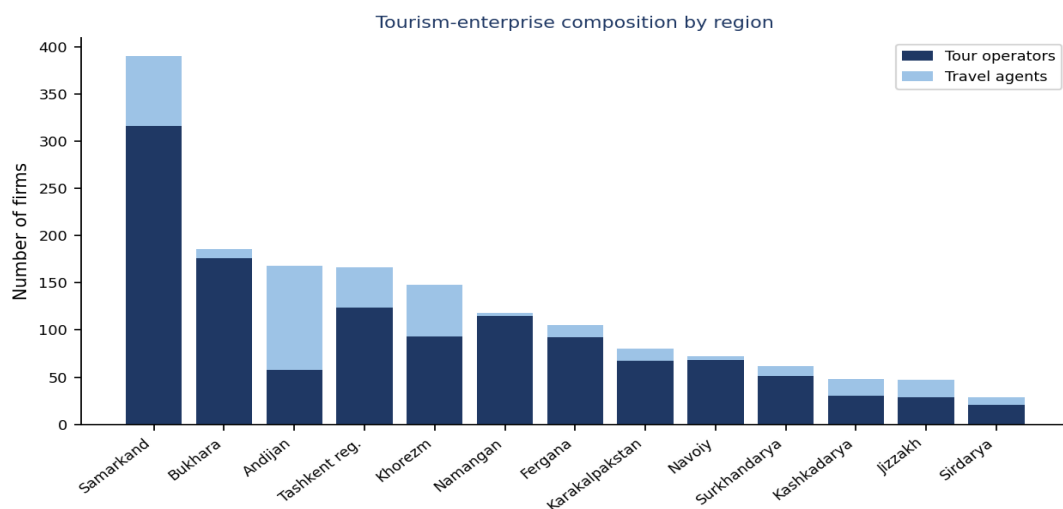


Figure 4. Composition of the travel trade (operators and agents) by region.

5. Discussion

The micro-level evidence supplies a concrete explanation for the macro-level tourist-services deficit. A national accommodation stock in which only a small minority of hotels is quality-classified, and in which the upscale segment is confined to three heritage cities, is exactly the enterprise structure that would generate a low score on a service-infrastructure pillar. The macro index, in this reading, is not measuring an abstract infrastructural shortfall but aggregating a very specific micro reality: most tourism enterprises operate outside any recognized quality framework. This reframes the service-infrastructure problem as a quality-certification and enterprise-upgrading problem.

The strong association between certified supply and inbound demand sharpens the policy implication. Because the certified segment is the demand-relevant one, extending certification beyond the heritage core is a plausible lever for spreading inbound demand to currently under-visited regions - complementing the dispersion logic of the companion regional studies. Certification is, moreover, an unusually tractable instrument: it requires standards, inspection and incentives rather than large capital outlays, making it a high-leverage, low-cost enterprise-policy intervention relative to physical infrastructure investment.

The intermediation findings add a second lever. A developed tour-operator base is the enterprise capability that converts physical and certified supply into marketed international products, and its uneven regional distribution means that even quality accommodation may go under-utilized where product-creating intermediation is absent. Enterprise policy that develops operator capacity in tandem with accommodation certification would address both blades of the micro-level constraint, consistent with the service-capability emphasis of the smart-tourism and frontier-analysis literatures.

The limitations are those of descriptive, cross-sectional enterprise data. The supply-demand association is co-determined and cannot be read causally; firm-level performance, service quality and price are not observed directly, so certification and the upscale count serve as proxies for enterprise quality; and the analysis covers the formal, classified structure rather than the informal accommodation sector that may be substantial. Firm-level survey data and a temporal dimension would allow these proxies to be validated and the certification-demand relationship to be identified more cleanly.

6. Conclusion

Descending from the macro index to the enterprise base reveals that Uzbekistan's weak tourist-services competitiveness rests on a pervasive micro-level quality-certification deficit: only about 7 percent of hotels hold any star classification, and the upscale segment is confined to three heritage regions. Quality-classified supply is strongly associated with inbound demand, and the intermediation base that markets destination products is unevenly developed. The macro-level service deficit is thus the aggregate of a specific and addressable enterprise-structure gap. Extending quality certification beyond the heritage core, developing the upscale segment, and strengthening the tour-operator base emerge as

the enterprise-level levers most likely to raise Uzbekistan's service-infrastructure competitiveness and to disperse inbound demand across its regions.

Foundational and applied contributions to destination-competitiveness measurement further underpin the present framework, including [12], [13], [14], [15], [16], [17].

The study's quantitative orientation is additionally informed by the tourism demand-forecasting literature, notably [18].

The wider literature on tourism-led growth, economic contribution and sector resilience also frames this study, including [19], [20].

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