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## Tourism and Aviation: The Impact of Aviation on the Development of Tourism in Uzbekistan

<sup>1</sup> Ian Patterson (PhD)

<sup>2</sup> Alisher Suyunov

<sup>3</sup> Mukhayyo Khamroeva

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<sup>1</sup> Visiting Professor, Department of Tourism  
Management, Silk Road International  
University of Tourism, Samarkand, Uzbekistan  
[ianpatterson75@outlook.com](mailto:ianpatterson75@outlook.com)

<sup>2</sup> Department of Tourism Management, Silk  
Road International University of Tourism,  
Samarkand, Uzbekistan  
[alisher.suyunov@univ-silkroad.uz](mailto:alisher.suyunov@univ-silkroad.uz)

<sup>3</sup> Graduate Student,  
Silk Road International University of Tourism  
and Cultural Heritage, Department of Tourism  
Management, Samarkand, Uzbekistan  
[m.xamrayeva15@gmail.com](mailto:m.xamrayeva15@gmail.com)

**Abstract:** This paper discusses the relationship between two major sectors of the economy, aviation and tourism by reviewing the main literature sources, and to explore the role that aviation has played in the development of the tourism industry in Uzbekistan. It begins by discussing the impact of aviation on tourism development through a brief history of the commercial airline industry. The aviation industry has played an important role in the development of tourism in Uzbekistan since 1991. Suggestions have been made to improve airline services such as the need to introduce another competing airline in Uzbekistan. In addition, there is a need to further develop a modern high-capacity international airport in Tashkent. If the government wishes to further promote its open skies policy, it must provide the latest technologies and modern facilities to cater for other foreign airlines, and to allow them to bring larger numbers of international tourists to Uzbekistan. (150 words)

**Key words:** aviation industry, tourism policy, Uzbekistan, Uzbekistan Airlines, government policy.

### Introduction

Tourism and aviation regularly interact with each other. Both these industries play an important role in the country's economy as both are important for the creation of jobs and to generate a large income stream for the country's economy. The valuable and dynamic interaction of these two aspects of the economy can lead to increased economic growth and job creation. Although air transport and tourism are mutually dependent sectors there has been little research on the interaction between them both

(Spasojevic, Lohmann et al., 2017). Therefore, it is important to discuss the relationship between these two major sectors of the economy by reviewing the main literature sources and to explore the role that the aviation industry has played in the development of tourism in Uzbekistan.

### **The Impact of Aviation on Tourism Development**

Air transport has become the primary means of transport for international leisure travel, and has provided an important stimulus for the opening up of certain tourist destinations (Lumsdon, 2000). Air transport and tourism are seen as mutually dependent (Duval, 2013; Forsyth, 2008), with airlines often involved in the planning and development of tourist destinations, while tourism destinations may invest in local airports or the development of new airline routes (Lohmann & Vianna, 2016). Thus, airlines have a major interest in selling destinations in order to achieve profitable load factors on specific routes. In this sense, airlines and national destination marketing organisations (DMOs) have similar goals and objectives, with both exerting some influence on the activities of the other (Lohmann & Duval, 2011). The 'bundling of packages' with accommodation and tour operators as well as with restaurants and rental cars has become common within the aviation industry since the 1970s (Laffan & Fossen, 2001).

Sezgin and Yolal (2012) have attributed the growth of tourism to the creation of the commercial airline industry and the advent of the jet aircraft. In October 1958, the Boeing 707 took its maiden commercial flight linking New York and Paris, with a refuelling stop in Gander, Newfoundland. In the late 1960s jumbo jets (Boeing 747, DC10) were developed that flew further, with more passengers, in a shorter time and at a cheaper fare than any previous aircraft. This was regarded as one of the most incredible inventions resulting in the growth of the airline industry while at the same time, the tourism industry soon became dependent on it.

Another development was the formation of the International Air Transport Association (IATA) in 1945, which was responsible for the organization of safe, regular and economic transportation worldwide, and the standardization of airlines. There are now around 290 airlines in over 130 countries and regions that are members of IATA, providing approximately 93% of all scheduled flights around the world (Graham, Papatheodorou et al., 2008).

Air travel has always been the dominant mode for long distance travel, and as international tourism has moved towards deregulation, the emergence of the low-cost carrier sector has significantly increased the accessibility of aviation for short and medium haul tourism trips. The introduction of new services from the low-cost carriers (no frills) has resulted in them 'grabbing' market share away from the network carriers, as well as establishing their power to negotiate access and privileges to new destinations and airports. Southwest Airlines, Ryanair and Easy Jet are excellent examples of successful and profitable low-cost carriers. Ryanair is Europe's largest low fares airline with 23 bases and 563 routes across 26 countries.

As a result, the real cost of flying has fallen by 60% over the last 40 years making it more accessible to more people. During the same period, aircraft have become 70% more energy efficient and 75% quieter (International Civil Aviation Organization, Global Aviation and Our Sustainable Future, n/d). According to the UNWTO (2019) the share of international air travel has increased from 46% in 2000 to 59% in 2019 while land transport has decreased from 49% to 35% in the same period. These statistics show that the role of aviation in the tourism industry has become increasingly important.

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### **The Role of Airlines in the Development of Tourism in Uzbekistan**

Aviation has played an important role in the development of tourism in Uzbekistan. Because Uzbekistan in terms of its geographical position is a 'double landlocked country' which is bordered by Kazakhstan to the northwest and north, Kyrgyzstan and Tajikistan to the east and southeast, Afghanistan to the south, and Turkmenistan to the southwest, it does not have direct access to the sea. Therefore, aviation is necessary as the main mode of travel for international visitors that arrive in Uzbekistan.

It wasn't until 1991 when the new President of the Republic of Uzbekistan, Islam Karimov came to power, that one of his first priorities was to strengthen the independence of the country after the collapse of the Soviet Union, by promoting an air transport-oriented tourism strategy. Uzbekistan Airways was founded in 1992 as the main flag carrier of Uzbekistan, and established its headquarters in Tashkent, the capital city of Uzbekistan. The Uzbek national carrier soon operated 75% of all flights from/to Uzbekistan and was responsible for meeting the needs of the Uzbek people in regard to air transport within the republic, ensuring air safety and creating the country's first aviation code (Khalikov, Liu, et al, 2021).

In 1995, Karimov decreed that the creation of a new national company 'Uzbektourism' be established to promote and develop tourism policy. One of its objectives is to cooperate with Uzbekistan Airlines for the betterment of air transport tourism, and the successful beginning of the heritage-based tourism industry on the Silk Road cities of Samarkand, Bukhara and Khiva (Airey & Shackley, 1997). By 1997, Uzbekistan Airlines included the addition of Airbus A-310s in order to replace the aging Soviet fleet, and as well as flying to the former Soviet Union states, they flew to all domestic airports in Uzbekistan, and to 20 new destinations in Europe, North America and Asia.

Uzbekistan had the only aircraft manufacturing plant, Chkalov which was named after the Russian test pilot who was awarded the title 'Hero of the Soviet Union' in 1936. This plant was one of the largest and most significant aircraft assembly plants in Central Asia that was used to manufacture cargo planes such as the Il76 or IL78 and IL-114 passenger planes. The Tashkent aircraft plant was a remnant of the Soviet era after the collapse of the Soviet Union, and in 2014 the plant was closed down. At its peak, Chkalov employed a workforce of 30,000 and was one of the largest businesses in Uzbekistan. From 2015 onwards it still retained aircraft parts, components production and aviation MRO services.

### **Recent Developments in the Aviation Industry in Uzbekistan**

It was not until 2016, that the new President Shavkat initiated a number of positive reforms for the airline industry. One of the first proposals his government advocated was to simplify visa and registration procedures for foreigner visitors. Since July 15, 2018, any visitor can enter the territory of Uzbekistan by e-visa which will allow the visitor to stay in the country for up to 30 days. In November, 2018, Mirziyoyev ordered the total reorganization of the country's national aviation plan. This resulted in the complete restructuring of Uzbekistan's state-run aviation industry and the legal separation of the national flag carrier Uzbekistan Airways from the management of the country's airports. This reorganization was aimed at reforming the country's Soviet style aviation management. To help find the best solution for sorting out of the single state-run company into separate, more efficient businesses, the Uzbekistan government asked the World Bank to assist in supporting this liberalization process (Rusaviainsider, 2018). In 2019, Uzbekistan President Mirziyoyev signed several acts aimed at developing tourism, with regional air travel at the heart of these measures. They included a review of the regulations, the optimisation of airline costs, increasing the number of direct domestic connections, and implementing state subsidy tools for low-margin routes (Russian Aviation Insider, 2020). In 2019, the national carrier operated domestic flights only from Tashkent to the eight largest airports of Urgench, Nukos, Samarkand, Bukhara, Termez, Fergana, Namangan and Navoi (Russian Aviation Insider, January 23, 2020).

The opening of the new arrival hall at Tashkent International Airport in 2018 has helped to solve many of the problems associated with overcrowding for passengers. The new building is one and a half times larger than the old terminal (Airport-technology.com 2018). Since January 1, 2018 the establishment of green and red corridors at the departure and arrival halls have also been a positive development. If products that are subject to custom control, they pass through the red corridor, while passengers with one or two quantities of products imported for non-commercial purposes cross to the green corridor (Novotours.uz n/d.).

In the past, almost all passengers were subject to custom control which created a great deal of inconvenience for passengers as it was necessary to complete a declaration form regardless of the value of your luggage. In addition, all passengers had to indicate the amount of money that they bought into the country. Now, interest in the amount of cash bought in by visitors (both citizens of Uzbekistan and foreigners) has been eliminated. The amount of money allowed to be taken out of Uzbekistan has increased from \$2,000 to \$10,000. It is now easier to exchange money not only at the airport but also throughout the country. The difference between bank and black-market rates have also been equalized in Uzbekistan (Uzdaily.com 2020).

From October 1, 2019, in accordance with international legal standards, the 'Open Skies' mode (reduces government interference in the commercial decisions of air carriers) was introduced at Karshi, Nukus and Termez international airports (Khalikov, et al, 2021). Furthermore, in 2020, the Chairman of the State Committee of the Republic of Uzbekistan for the Development of Tourism Aziz Abdulkhakimov stated, "We are currently negotiating with a number of foreign airlines for the organization of flights to these airports". (uzdaily.com February, 19, 2020).

### **Impact of COVID-19 pandemic on the tourism and airline industry in Uzbekistan**

On a global basis the International Air Transport Association's (IATA) reported that the revenue passenger kilometers (RPK) dropped by 38% in 2020 compared to 2019. The International Civil Aviation Organization (ICAO) further stated that there was an overall reduction of 50% of seats offered by airlines, which translated to a reduction of 2,699 million passengers, and approximately USD 371 billion loss of gross passenger operating revenues of airlines. Financially, the airlines were projected to lose \$84.3 billion worldwide in 2020, with a net profit margin of -20.1 percent (IATA, 2020).

In Central Asia, virtually all domestic and international air travel was suspended in an attempt to contain the spread of COVID-19. In March 2020, Uzbekistan Airways announced the cancellation of all international and domestic flights for an indefinite period. The airline asked passengers for their understanding because of the cancellation of flights, stating that there they could rebook their tickets for any future date after flights have been restored (KUN.UZ, March 23, 2020). On June 3, the government reported that the tourism sector had suffered enormous damage with air communications suspended, borders were closed, and movement between cities limited (UZ Daily, June 3, 2020).

By April 30, 2020 the spread of COVID-19 had resulted in a drop in the number of foreign visitors to Uzbekistan (between January and March) to 1.2 million. This total figure showed a decrease of 12% compared with the same period in the previous year. This decrease was mainly from visitors who were returning home from CIS countries (95.6%), with only 53.6 thousand (4.4%) arriving from non-CIS countries (KUN.UZ, April 30, 2020).

On June 15, 2020 it was announced that international air services would resume for countries that originated from epidemiologically stable countries, as well as Uzbek citizens who were returning home. It was further announced that extended quarantine restrictions were to be re-imposed by the government who declared that no domestic travel was allowed between the regions during this time because of the



recent increase in positive COVID-19 cases. In a further announcement it was announced that quarantine restrictions were extended to October 1, 2020 when the border reopened for international flights.

### **How can the Aviation Industry be improved in Uzbekistan?**

There are several ways that have been suggested to improve the airline industry in Uzbekistan.

One suggestion is that the Uzbek government needs to introduce two competing airlines to replace the old monopolist company. It would be good to replicate the UAE experience and put this into practice in Uzbekistan. Dubai (UAE) has become an international tourism destination for tourist and business travellers through their well-developed infrastructure. Dubai is recognised as an entertainment hub, known for its shopping malls, hotels, resorts, parks and various attractions. It is leading tourism and trade on a global level, as well as in the field of aviation. The fact is that Dubai Airport handled nearly 90 million passengers in 2018, and remains the world's busiest airport in terms of international passengers (Gulf News, 2019). The kingdom's other flagship, Etihad Airlines competes with Emirates, and this competition has had a positive impact on them both. Furthermore, Abu Dhabi Airport serves 23 million passengers each year (Sky scanner n.d.). At this stage, it is too ambitious to expect Uzbekistan Airlines to move to this level, however the creation of at least two competing airlines will show that aviation in Uzbekistan has the opportunity to grow at a faster rate.

In addition, foreign airlines are now establishing flights to Tashkent and other cities of Uzbekistan, like Samarkand and Bukhara. The UAE based low-cost airlines Flydubai and Air Arabia have begun operating in Uzbekistan. However, the inconvenience, small capacity and lack of modernity of the Tashkent airport still creates problems for passengers. This is because the airport which was built during the Soviet era does not meet modern requirements. For example, it is a pity that there is no special elevator at the departure terminal for wheelchair passengers or older people. It is also a fact that there is almost no conveniences for the relatives of passengers who come to meet or see off their close relatives or friends who have to wait outside, either in the heat or bitter cold.

### **Conclusion**

In their terms as President of the Republic of Uzbekistan, both Karimov and Mirziyoev initiated a number of positive reforms to restructure the aviation industry. Karimov was keen to develop a new air transport-oriented tourism strategy. He supported the establishment of Uzbekistan Airways in 1992 as the main flag carrier of Uzbekistan, and in 1995 created a new national company 'Uzbektourism' to promote tourism policy. One of its main objectives was to cooperate with Uzbekistan Airlines to initiate air transport that promoted the beginning of the heritage-based tourism industry in the Silk Road cities of Samarkand, Bukhara and Khiva. President Mirziyoev further restructured Uzbekistan's state-run aviation system and separated Uzbekistan Airways from the management of the country's airports, especially in regional areas.

However, in 2020 the COVID-19 pandemic paralyzed the aviation industry of Uzbekistan, having a significant impact, due to strict travel restrictions and a lack of demand from international travelers. For almost six months, the only means of passenger transportation was by charter flights, providing one-way traffic for the repatriation of Uzbek citizens from abroad to Uzbekistan. This resulted in a large drop in the number of foreign visitors to Uzbekistan, with only 53.6 thousand (4.4%) arriving from non-CIS countries (January to April, 2020). From the beginning of October 2020, regular flights began to reopen, and the aviation industry slowly began to recover.

Uzbekistan has the potential to be a bridge not only for Central Asia, but also between Asia and Europe. Unfortunately, Kazakhstan's Air Nur Sultan, formerly known as Air Astana is likely to overtake Uzbekistan Airways to become the best airline in Central Asia. They are already ahead of Uzbekistan Airways in terms of on-time performances and customer service. On October 14, 2021 Air Nur Sultan

unveiled new plans to expand its international travel by flying to Phuket, Dubai, St. Petersburg, and Istanbul from the November 1, 2021 (Travelog, 2021). In addition, the first flight by Qatar from Doha to Tashkent took off on 17 January 2022, operated by an Airbus A320 aircraft and featured 12 seats in Business Class and 120 seats in Economy Class.

Recently, the need for a high-capacity international airport in Tashkent that fully meets modern requirements was recognized by the Uzbekistan government. On September 3, 2021, the Government opened a new departure hall with an additional area for passengers of international destinations. In the departure hall, new engineering and technological equipment has been installed, there are “green” and “red” corridors, 12 passenger check-in counters, six passport and border control points, an open Wi-Fi network and Duty-Free shops, cafes and a modern room for mothers and children, an exit area for a telescopic ladder, and two gates for exiting buses. In the second stage of reconstruction which is scheduled to be completed in May, 2022, Uzbekistan Airports JSC plans to open a new VIP lounge, increase the network of modern trade, catering, banking and other passenger services at the airport, based on a public-private partnership (UZDAILY, September 3, 2021).

The Samarkand International Airport has also been redeveloped and was officially opened on December 10, 2021. The construction of the new airfield complex that includes the addition of three new runways - 105 meters long and 60 meters wide, the construction of 24 parking spaces to accommodate all types of aircraft, and a 700-space passenger car park have now been fully completed. The new terminal will raise the airport's overall capacity from 460,000 passengers per annum to 2 million passengers yearly. The number of flights will also increase from 40 to 120 per week (Uzbektravel, December 10, 2021). It is hoped that the reconstruction of these two airports in Tashkent and Samarkand, the two biggest cities in Uzbekistan, with their modern high-tech facilities will begin to meet all future demands and greatly boost tourism in Uzbekistan.

Finally, the Uzbekistan government needs to support another competing airline to boost their aviation industry and to provide competition for Uzbekistan Airlines. Uzbekistan Airways has a large international network, operating 63 international routes from nine Uzbekistan airports to 44 international destinations. However, 59 of the 63 international routes are served less than daily. Several major destinations such as Milan, Rome and Paris are currently only served once per week. A staggering 35, or 56%, of all the airline's international routes are served with only one or two weekly flights. It has been suggested by several commentators that Uzbekistan Airlines would be better off focusing on serving a smaller number of international destinations with a higher number of frequencies. Another suggestion is the creation of at least two competing airlines, which will hopefully result in the aviation industry in Uzbekistan growing at a faster rate. As noted previously, Etihad Airlines competes with Emirates in the UAE, and this competition has had a positive impact on both airlines.

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