

# Strategiya va amaliy yechimlarni ilgari suruvchi ilmiy- tadqiqot ishlari

Научно-исследовательская деятельность  
содействующая стратегиям и практическим решениям

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Онлайн Форум Центра прикладных исследований  
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# Dastur | Программа

- Ochilish marosimi
  - Amaliy Tadqiqotlar Markazi (ATM)
  - Toshkent Xalqaro Vestminster Universiteti (TXVU)
- Research webinar
  - Qishloq xo'jaligi: Etenesh Asfaw, Efiopiya
  - Turizm: Fabrizio Vielmini, Italiya
  - Inson Kapitali va uning o'sishi: Rauf Salahodjaev, O'zbekiston
  - ATM direktori, Peter Malvicini, AQSH
- Открытия и приветствие
  - Центр прикладных исследований (ЦПИ)
  - Международный Вестминстерский Университет в Ташкенте (МВУТ)
- Вебинар
  - Сельское хозяйство: Etenesh Asfaw, Эфиопия
  - Туризм: Fabrizio Vielmini, Италия
  - Человеческий капитал и рост: Rauf Salahodjaev, Узбекистан
  - Директор ЦПИ, Peter Malvicini, США

*O'zbekiston qishloq xo'jaligidagi dolzarb muammolar:  
barcha fermer xo'jaliklarini maqsadli qamrab olish*

*Актуальные вопросы в секторе сельского  
хозяйства Узбекистана: целевой охват всех ферм*

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**CPRO** POLICY RESEARCH OUTREACH  
**Policy Brief**  
 Eteneş Asfaw CPRO Policy Brief 2019-04  
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## Cotton Industry Reform in Uzbekistan: Implications of Textile Clusters

**Key Messages**

The current government of Uzbekistan is open to major reforms in the cotton sector. An important one is introduction of cotton-textile clusters. Cotton clusters are expected to attract investments from private sectors and modernizations. This in return will increase productivity and resource use efficiency and speed-up value-addition. Clusters are also expected to improve linkage with farmers, create decent working conditions for cotton pickers, phase-out subsidies and reduce the responsibility of the state. An assessment of cotton-textile clusters points out that clusters improve productivity and quality of raw cotton. They provide agronomic advice to farmers and promote adoption of modern technologies. Nevertheless, cotton pickers continue to be mobilized through district farmers' councils and the old state-owned production target continues. The enforcement of unrealistic and overestimated production quotas is a hindrance for performance of the textile clusters. If the cluster approach is to be encouraged, State production targets should be eliminated and clusters themselves should manage cotton harvest in a socially responsible manner, without forced labor.

**Cotton Reform**

Cotton continues to be a strategic commodity for Uzbekistan and its economy. The cotton supply-chain has yet been long criticized for being repressive, state controlled and regulated, inefficient in resource use, and ecologically unsustainable.<sup>1</sup> This said, the current government is open to changes and has made several major reforms in the sector as of 2018. An important reform is introduction of a new concept of cotton-textile clusters.<sup>2</sup>

The government believes that clusters are the fastest way to reform the sector. This view is echoed in a speech the President of Uzbekistan, Shavkat Mirziyoyev gave at a budget meeting on September 12, 2018, where he highlighted: "The future of agriculture and its economic efficiency depends on [clusters]. Clusters should be the 'locusts' for the accelerated development of the agricultural sector".

**Anticipated Changes in Clusters**

The textile cluster model envisages textile enterprises to organize the whole supply chain— from production of raw cotton to processing and production of textile products with high added value. The goal of the mix is to vertically integrate and increase foreign direct investment in textile industries. Clusters are expected to attract investments in modern technologies, innovations and mechanization from private sectors. This in return will increase productivity and resource use efficiency and speed-up value-addition. Clusters are also expected to improve research-extension linkage with farmers, create decent working conditions for cotton pickers, phase-out subsidies and in the long run reduce the production management and marketing responsibility of the state.

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## Rural Youth in Agriculture and Rural Development of Uzbekistan

**Key Messages**

- Uzbekistan's long-term commitment to rural livelihoods transformation is expected to happen amid a demography of 60 percent under the age of 30.
- The youth are resource that can promote economic growth, only if skilled and employed.
- Absence of well-paid jobs and low productivity in the rural sector are the primary motives for rural unemployment and massive youth migration.
- Addressing rural youth unemployment and slowing down migration is a necessary condition for the intended long-term and inclusive rural development vision of Uzbekistan.
- For Uzbekistan's rural transformation to harness the potential of the youth, all policies, strategies and interventions need to coherently demonstrate that agriculture value chains are rewarding careers and that they provide sustainable opportunities for the rural youth.

**Growing Labor Force**

The recently approved 2020-2030 agriculture development roadmap of Uzbekistan provides mechanisms for implementing major reforms in nine priority areas in agriculture and rural development.<sup>1</sup> The roadmap is a reflection of the government's commitment to long-term rural livelihoods transformation that is expected to happen amid a 'youth bulge' in the country's demography. More than 60 percent of the Uzbekistan population is under the age of 30.<sup>2</sup> This is an evidence of a growing labor force, with more than 500 thousand youth joining the labor force, annually. By 2030, Uzbekistan is projected to have the 5th largest labor force in central Asia and Eastern Europe region. A large number of the youth reside among the 50 percent rural population. This working age population is a resource that can promote economic growth for the country, only if skilled and employed.

**The Problem**

Youth unemployment is increasingly threatening Uzbekistan. The 1991 youth policy and follow up strategies give due attention to youth unemployment. As a result, the country reduced its youth unemployment rate from 23 percent in 1998 to 10 percent in 2017. In 2016, Uzbekistan ranked 53rd out of 183 countries in the Youth Development Index, with overall score of 0.68 (very high) that was better than the previous YDI of 2010.<sup>3</sup> Notwithstanding the government's efforts in job creation, the rate of youth unemployment remained as high as 9.7 percent in 2018, and 10.3 in 2019 with the youth unemployment twice as likely as the older generation, even more among young girls who are much less likely to have access to the job market.<sup>4</sup>

Research shows that rural youth unemployment, followed by distress migration is generally triggered by declining interest of the youth in agriculture, coupled with lack of access to farm land and weak youth and inconsistent policies.<sup>5</sup> Uzbekistan is not an exception. Absence of well-paid jobs and low productivity in the rural sector are the primary motives for rural unemployment and massive international and internal youth

<sup>1</sup> The ten-year agriculture development strategy was approved by the government in September 2019. Decree of the President—7865, 2019. *The Strategy for the Development of Agriculture Sector in Uzbekistan (2020-2030)*.

<sup>2</sup> Youth in Uzbekistan are between ages 14 and 30 (Uzbekistan: Factsheet, 2014) Youth Policy Labs, *Uzbekistan: Factsheet*, <https://www.youthpolicy.org>.

<sup>3</sup> The Commonwealth 2016. Global Youth Development Index.

<sup>4</sup> World Bank, 2019. *Youth Unemployment Rate for Uzbekistan*, <https://data.worldbank.org/series>.

<sup>5</sup> Deotti and Estrach, 2016. *Addressing rural youth migration and its root causes*, FAO.

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## "Dehqan" Farms: Uzbekistan's Under-served 70 Percent

**Key Messages**

- Support targeted to the small *Dehqan* farms would increase national agricultural productivity, supporting livelihoods in rural areas.
- Seventy percent of Uzbekistan's agricultural output comes from the *Dehqan* farms that represent 95 percent of all farms and operate only one fifth of all farmland.
- Dehqan* farms have unrestricted production and marketing choice, stronger tenure security and higher crop productivity compared with large farms.
- Dehqan* farms, however, experience global yield gaps, have difficulty entering modern markets, and own little incomes.
- Uzbekistan's agriculture sector needs to ensure that *Dehqan* farms receive the vital support they require for increased productivity, commercial competitiveness and profitability.
- Priorities are land markets, collective actions, farm advisory services and integration of young and female managed *Dehqan* farms.
- The sector will benefit by learning from global practices in smallholder agricultural transformation.

**Introduction**

Uzbekistan has two distinct, but dominant and co-existing agricultural structures. One is that of the small-scale family farms, locally known as *Dehqan* ("peasant") or household farms. The second is that of the large commercial private farms known as *Fermer*.<sup>1</sup> This policy brief analyzes the characteristics and challenges of *Dehqan* farms along main agricultural variables like land size and tenure, production and productivity, farm labor, farm decision-making and market participation. By doing so, the article contributes to the better understanding of *Dehqan* farms. The brief underpins the claim that small-scale farms in Uzbekistan are productive, efficient and sustainable. Nevertheless, it also points out the needs for ensuring that *Dehqan* farms receive the vital support they require, given the challenges the farms face and the overall national benefits of working with them.

**"Dehqan" Farms Characteristics**

**Farm size and tenure:** *Dehqan* farmers are granted land by the State as lifetime inheritable possession.<sup>2</sup> Currently, there are more than 4.8 million *Dehqan* farms sharing 20 percent of the country's arable land. *Dehqan* farmers cannot expand their irrigated land beyond the maximum 0.35 hectare (ha), set in the Land Code. Actually, *Dehqan* farms operate a lesser land size of 0.2 ha, on average.<sup>3</sup>

Absence of a legally recognised market for irrigated land is a major challenge for *Dehqan* farms. Apart from emerging informal land transactions, the only way for *Dehqan* farms to enlarge their land size is by accessing low-quality rain-fed land (up to 2 ha).<sup>4</sup>

*Dehqan* farms co-exist with the over 80 thousand large farms/ *Fermer*. Large farms operate an average land size of 15 ha accessed through a long-term (ten to fifty years)

<sup>1</sup> Traditional small farms from the Soviet times were renamed and strengthened through laws adopted in 1998. Another law legislated the establishment of individual large farms, as of 1992.

<sup>2</sup> Land Code of the Republic of Uzbekistan, 2004/08, no. 298-I (amended in 2019). The Code affirms that agricultural land belongs to the State.

<sup>3</sup> *Dehqan* have two plots. A 0.05 ha near their homes for horticulture and animal production and other 0.12 ha as a distance for grain production. See *Dehqan* U. et al. 2013. *Understanding success in making agribusiness: Cotton, Dehqan and success in Dehqan*. *Uzbekistan Journal of Rural Studies*, 12, 137-147.

<sup>4</sup> For assessment of informal land markets like rent and crop sharing, see *Dehqan* U. et al. 2013, cited above.

<sup>5</sup> UNCTAD, 2010. *Livelihood production in Uzbekistan: Current state, Challenges and Prospects*.

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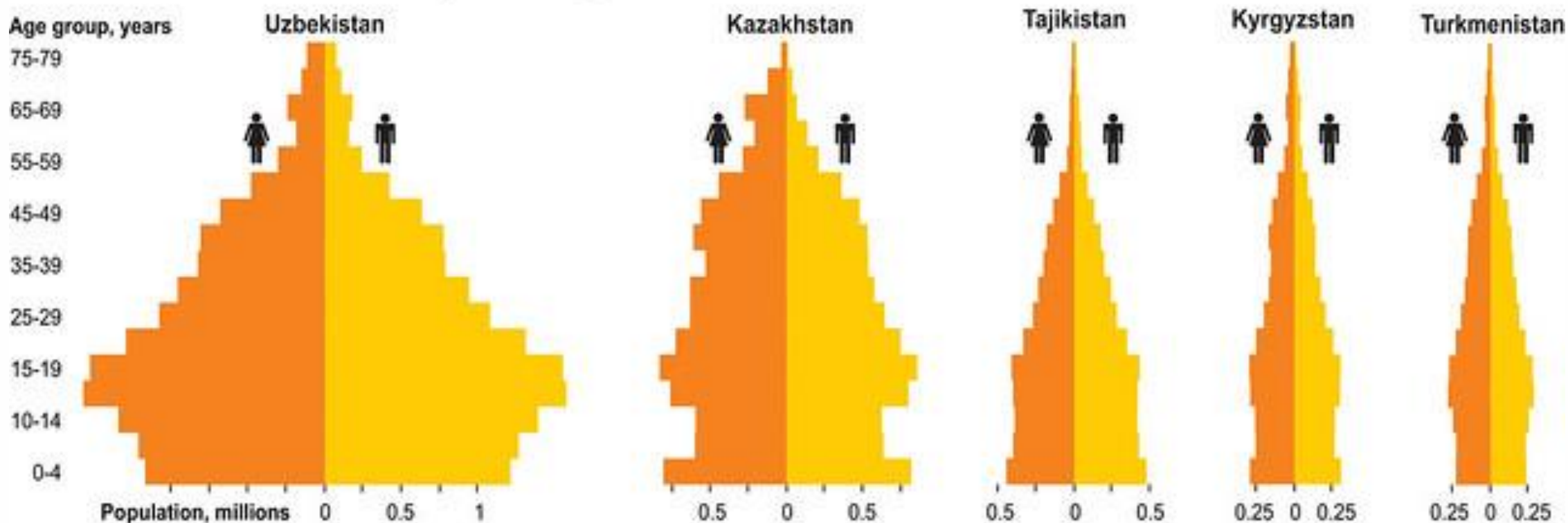
# Qishloq yoshlari | Сельская молодежь

- O'zbekiston qishloq turmush sharoitini yaxshilash va har sohada qishloq aholisini to'laqonli qamrab olishga intilmoqda
- Islohatlar "Yoshlar sonining keskin o'sishi" davrida yuz berishi lozim, 60% - bu <30 yosh.
- Uzbekistan стремится к улучшению условий жизни и инклюзивности сельского населения
- Реформы, которые должны произойти в период "Молодёжного бугра", 60% - это возраст < 30 лет.

# Yoshlar sonining keskin o'sishi

## Молодёжный бугор

Population pyramids: Central Asian nations in 2010



Source: U.S. Census Bureau ([www.census.gov/population/international/data/idb/](http://www.census.gov/population/international/data/idb/)), data for 2010

# Qishloq yoshlari | Сельская молодежь

- Yoshlar mehnatining afzalligi (yiliga >1/2 mln).
- Yoshlar faqatgina malakali va ish bilan band bo'lgan holdagina manbadir.
- Преимущество молодежного труда (> 1/2 м в год).
- Только занятая и квалифицированная молодежь является ресурсом

# Yoshlar orasida ishsizlik darajasi | Уровень безработицы среди молодежи

## Аmmo ...

- Qishloq yoshlar orasida yuqori darajadagi ishsizlik (> 10%)
- Ommaviy migratsiya (7 mln)
- Covid-19dan keyin yoshlarning kelajagi?

## Но...

- Высокий уровень безработицы среди сельской молодежи (> 10%)
- Массовая миграция (7 млн)
- Будущее для молодежи после Covid-19?



# Yoshlar orasida ishsizlik darajasi

## Уровень безработицы среди молодежи



**Qishloq xo'jaligidagi ta'minot zanjirlari qishloqlardagi ishsizlikni bartaraf etish va migratsiyani sekinlashtirish uchun imkoniyatlarga ega.**

**Цепочки поставок в сельском хозяйстве имеют потенциал для решения проблемы сельской безработицы и замедления миграции.**

# Yoshlar orasida ishsizlik darajasi | Уровень безработицы среди молодежи

## Nima uchun yoshlarni jalb qilish kerak?

1. Zamonaviy / raqamli / tillardagi SMART texnologiyalar
2. Fermer xo'jaliklarining faqatgina **katta avlod vakillari** tomonidan yuritilishi va **feminizatsiya**
3. Ijtimoiy-siyosiy barqarorlik.

## Зачем заниматься молодежью?

1. SMART технологии на современном / цифровом / языках
2. Ведения сельского хозяйства пожилым поколением фермеров / **феминизации**
3. Социально-политическая **стабильность.**

## Qanday qilib?

1. Yoshlarni **agro-oziq-ovqat sektori yaxshi daromad manbai** ekanligiga berish shijoatlantirish
2. Agri-oziq-ovqat zanjirlariga yoshlarni **jalb qilish**
3. Qishloq **xo'jaligi yerlari va kapital** o'rtasidagi imkoniyatlarni yaxshilash.
4. **O'z yeriga ega bo'lmaganlarni jalb qilish**

## Как?

1. Мотивировать молодежь: **«агропродовольственный сектор приносит пользу»**
2. Сделать агропродовольственные сети **привлекательными**
3. Улучшить доступ к **сельскохозяйственным угодьям и капиталом.**
4. Привлечь людей **не имеющих** собственной земли



## Qanday qilib?

5. **Strategiya va amaliy yechimlar uyg'unligini** ta'minlash (dizayn va monitoring)

6. Yoshlarni aniq **maqsadga yo'naltirish** (masalan kvotalar/imtiyozlar orqali)

7. Qishloq xo'jaligida **pul o'tkazmalarini** qayta investitsiyalash.

## Как?

5. Обеспечить **согласованность стратегии** (дизайн и мониторинг)

6. **Нацелиться** на молодежь, (например квоты)

7. Реинвестировать **денежные переводы** в сельское хозяйство.

- fermer xo'jaliklarining faqatgina katta avlod vakillari tomonida yuritilishi va feminizatsiyasi
- zamonaviy va yangi



- ведения хозяйства пожилым поколением фермеров / феминизации
- современный и привлекательный



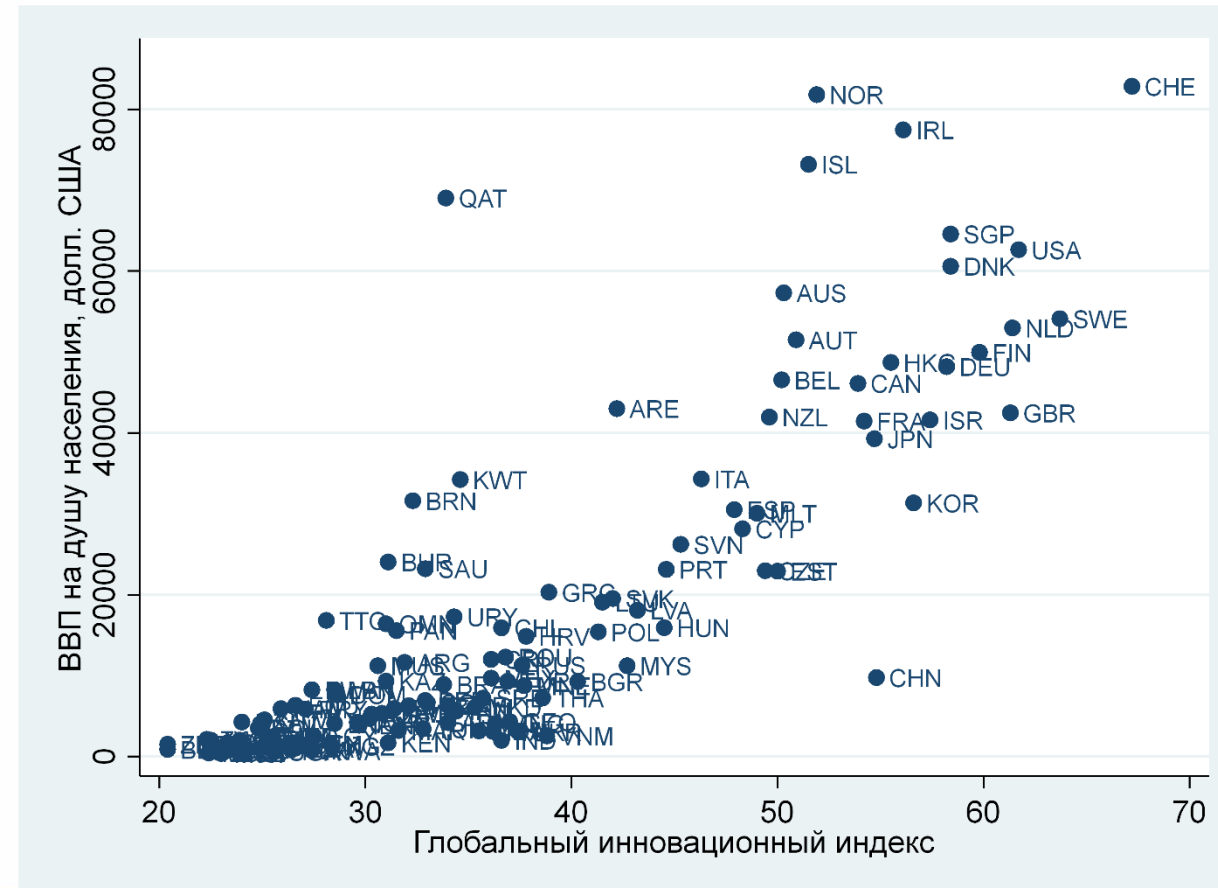
# Роль науки в контексте национального развития

Raufhon Salahodjaev, Старший Научный Сотрудник, ЦПИ



# Узбекистан и ГИИ

- ГИИ имеет тесную позитивную взаимосвязь с уровнем экономического развития стран и темпами экономического роста. С одной стороны, более развитые страны имеют больше экономических рычагов стимулирования инноваций, но с другой стороны, исследования в области макроэкономике показывают, что инновации являются фундаментальным фактором экономического роста.





## Наибольшие разрывы с Топ-50:

- Высшее образование (доля иностранных граждан в ВУЗах, прием в ВУЗы);
- Наука (число научных публикаций, цитируемость ученых, число ученых на 1 млн. населения);
- Развитие рынка капитала и приток ПИИ;
- ИКТ сектор (охват населения сетями LTE, доступ к интернету и ИКТ и др.)



# Меры по привлечению ученых

К мерам по привлечению молодежи в науку и повышению качества научной деятельности можно отнести:

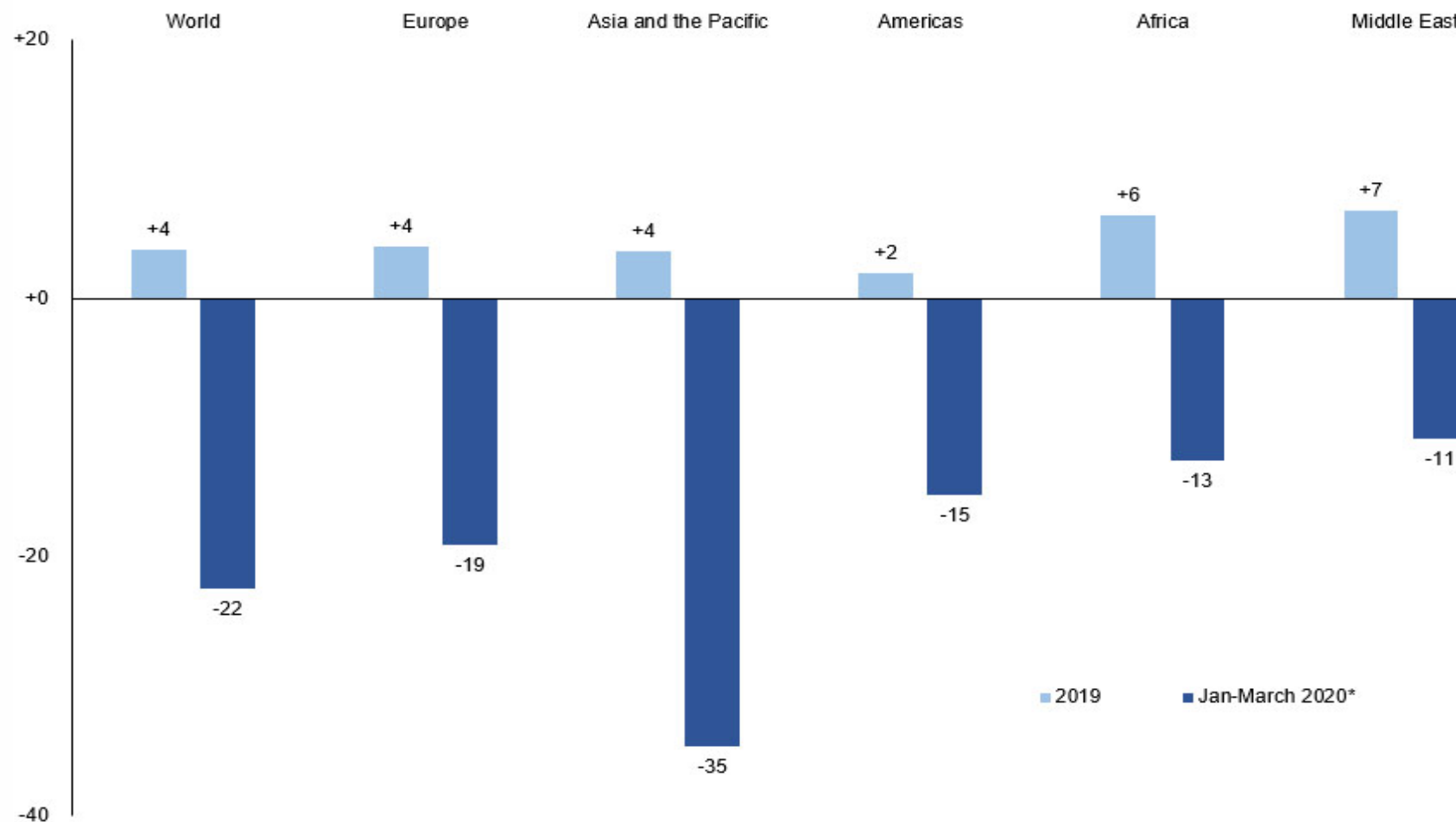
- модификацию традиционной централизованной модели финансирования научной деятельности в сторону децентрализации
- создание научных тематических стартап инкубаторов;
- создание инструментов для финансирования независимых ученых и исследовательских групп по различным тематикам
- популяризацию науки среди молодежи посредством проведения тренингов и семинаров с привлечением ведущих местных и зарубежных ученых
- финансирования грантами мини исследовательских лабораторий

# Восстановление туризма в Узбекистане после COVID-19: использование культурных и внутренних ресурсов

Fabrizio Vielmini, Старший Научный Сотрудник, ЦПИ



## Прогноз ЮНВТО о глобальном спаде туризма



# Меры принятые после "черного дня"

## Государственная поддержка важна для сохранения отрасли

### Сохранить человеческие ресурсы

- Освобождение от налогов
- Стимулирование и субсидирование стартап проектов
- Развитие онлайн-туризма



**Широкая стратегия на поддержание фрилансеров/  
инфлуенсеров и интереса зарубежных туристов посетить  
Узбекистан**

**Эффективное использование мер мед-безопасности  
(зарубежного опыта)**

## Новый рубеж: внутренний туризм

- Следующие два года будут критичными. внутренний туризм основной частью сектора
- Осведомленность общественности
- Система льгот для поощрения граждан совершать домашние поездки
- MICE - Встречи, Поощрения, Конференции, Выставки
- Установить лучшую связь между объектами наследия, природными территориями, гастрономическим и сельским туризмом
- Производственно-сбытовые цепочки: укреплять взаимодействие с региональными администрациями и частным сектором





## Капитальный ремонт сектора неизбежен

- Сотрудничество: туристским компаниям придется объединиться
- Реконструкция и расширение гостиничного сектора
- Внедрение системы безопасности (HoReCa)
- Допуск на авиаперевозок рынок бюджетных авиакомпаний
- Изменения в профиле и происхождении посетителей (основной драйвер туристы из Поднебесной?)
- Пересмотр стратегии и обновление тур-предложений (сайты азартных игр и объекты ночной жизни?)





# COVID-19 как возможность

- Как и любой кризис, пандемия несет в себе **перспективы создания новой** и более здоровой туристической среды.
- **Наращивание потенциала:** туристические предприятия могут использовать паузу для устранения пробелов в их возможностях
- Число **Туристов**, уменьшится, и они будут отдавать предпочтение качеству сервиса
- **Устойчивый и Ответственный Туризм:** акцент на ресурсах сельского и культурного наследия



# Xulosa | Заключение

- Yakuniy savollar
    - Taqdimotchilardan biri
  - Biz bilan hamkorlik qiling (ATM)
  - E'tiboringiz uchun rahmat!
- Заключительные вопросы
    - Один из докладчиков
  - Сотрудничайте с нами (ЦПИ)
  - Спасибо за внимание!



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