Foresight-Driven Pathways for Circular Economy Integration

Tajikistan's Food and Tourism Sectors

The SWITCH-Asia Programme

Disclaimer

Contributors Appreciation

Table of Contents

Tables and Figures

List of Acronyms and Abbreviations

5G	5th generation of cellular network technology (2019), successor to 4G.
CE	Circular economy
CIPE Asia	Center for International Private Enterprise
EBRD	European Bank for Reconstruction and Development
ESG	Environmental, social and governance
EU	European Union
FAO	Food and Agriculture Organization of the United Nations
GBAO	Gorno-Badakhshan Autonomous Province
GDP	Gross domestic product
GSTC	Global Sustainable Tourism Council
ITC	Information and communication technologies
IFC	International Finance Corporation
kWh	kilowatt hours
NASMB	National Association of Small and Medium Businesses
NDP	National Development Program
NGO	Non-governmental organisation
SCP	Sustainable consumption and production
SDG 12	[United Nations] Sustainable Development Goal 12
SMEs	Small and medium-sized enterprises
TA	Technical advisory
TATO	Tajik Association of Tour Organisations
TCBTA	Tajik Community Based Tourism Association
TDC	Tourism Development Center
UN	United Nations
UNWTO	United Nations World Tourism Organization

Executive Summary

This Final Report presents the results of the Technical Advisory (TA) project implemented under the SWITCH-Asia Policy Support Component, focusing on the transition to a circular economy in Tajikistan's tourism and hospitality sector, with a strategic emphasis on food systems. The initiative supports the broader commitment of the European Union (EU) to sustainable consumption and production (SCP), resource efficiency, and low-carbon development in Central Asia, as outlined in the EU Green Deal and Global Gateway strategies.

Tourism in Tajikistan is a rapidly growing sector with transformative potential, particularly in rural and mountainous regions. However, the sector still faces persistent challenges, including seasonal variability, limited green certifications, weak integration with agri-food systems, and vulnerability to climate change. These structural gaps are compounded by insufficient digital infrastructure, low environmental, social and governance (ESG) compliance among small and medium-sized enterprises (SMEs), and fragmented policy coordination.

The circular economy (CE) was selected as the guiding framework for this project because it offers a systemic and future-oriented approach to these challenges. Food systems were identified as a strategic entry point because of their central role in tourism experiences and their potential to promote local value chains, sustainability, and responsible consumption.

The project applied a strategic foresight methodology, engaging stakeholders through interviews, scenario planning, and policy validation. This participatory approach ensured that the recommendations are grounded in Tajikistan's realities and aligned with national development priorities.

Key highlights

- Tajikistan welcomed 1.4 million international tourists in 2024, a 16.7% increase from 2019, thus demonstrating growth in the sector; however, major gaps remain in tourism infrastructure, digital access, and sustainability practices, especially in remote regions.
- Stakeholders identified four future pathways for tourism: digital-driven growth, investment-led transformation, community-based tourism, and the revival of traditional practices.
- The preferred vision for 2040 includes tourism contributing significantly to national GDP, year-round travel, green infrastructure, and strong community engagement

Main policy recommendations

This report proposes a targeted policy framework structured around five strategic pillars.

1. **Circular economy in tourism**: Promotion of zero-waste certification, eco-friendly infrastructure, and legal frameworks for green certification
2. **Green infrastructure**: Support for renewable energy microgeneration, modular eco-designs, and fiscal incentives for sustainable construction
3. **Community-based tourism**: Expansion of tax incentives, vocational training, and support for eco-guides and artisans
4. **Smart resource management**: Building human capital in sustainability and digital skills, implementing monitoring systems, and introducing impact-based taxation
5. **Low-impact mobility**: Investing in electric vehicle infrastructure along with cycling corridors, and launching a Digital Green Travel Pass

Cross-cutting actions

Proposed cross-cutting actions include the following:

- Convening a National Dialogue on Circular and Sustainable Tourism
- Advancing legal and fiscal reforms to support green standards
- Driving digital transformation through smart tourism platforms, e-certification, and data-driven planning
- Mobilising strategic investment and donor support
- Establishing multi-stakeholder task forces for coordinated implementation

Expected impact

If implemented effectively, the framework will deliver transformative impact across multiple dimensions, as follows:

- **Environmental:** Reduced pollution and resource strain, preserving fragile ecosystems
- **Economic:** Diversified income sources and green job creation, especially in rural areas
- **Social:** Strengthened community participation and cultural preservation
- **Digital:** Enhanced service quality, transparency, and competitiveness through smart tourism tools
- **Regional:** Tajikistan's leadership in circular tourism can catalyse cooperation across Central Asia

Circular economy principles, digital transformation, and inclusive governance can unlock sustainable growth in Tajikistan's tourism sector. By converting strategic foresight into actionable policy measures, Tajikistan will be strategically positioned to assume a leading role in advancing circular and sustainable tourism across the region, and delivering measurable benefits for its economy, environment, and society.

1. Context and statement of the problem

The Republic of Tajikistan, a mountainous and landlocked country in Central Asia, shares borders with Afghanistan, China, Kyrgyzstan, and Uzbekistan. As of early 2020, the population reached approximately 9.8 million, with a steady annual growth rate of 2%–2.2%. Despite geographic constraints and limited access to global markets, Tajikistan has made notable progress in socio-economic development over the past two decades. Between 2000 and 2020, the national poverty rate declined significantly from 83% to 26.3%, reflecting improvements in income levels, public services, and economic stability.

Structural vulnerabilities, however, still remain. Tajikistan lacks substantial proven reserves of oil and gas, and relies heavily on imports to meet its energy needs. While the country possesses considerable coal reserves, these are located in remote mountainous regions, limiting their accessibility and economic viability. In contrast, Tajikistan holds 4% of the world's total hydropower potential, ranking the country among global leaders in renewable energy resources. With the theoretical capacity to generate up to 527 billion kWh annually, hydropower presents a strategic opportunity for sustainable energy development. Yet less than 5% of this potential is currently utilised, underscoring the need for investment, infrastructure, and policy reform.[1]

Looking ahead to 2030, Tajikistan envisions itself as a stable, inclusive, and prosperous nation. The long-term country development strategy emphasises national unity, social justice, and economic efficiency, with the overarching goal of improving living standards through sustainable growth. Key strategic objectives include:

* Ensuring energy security and efficient electricity use
* Transforming Tajikistan into a regional transit hub
* Achieving food security and improving nutritional outcomes
* Expanding productive employment, particularly in rural areas.

Tourism is expected to play a transformative role in Tajikistan's development by 2030.[2] The sector is projected to contribute significantly to GDP and job creation, especially in remote and rural regions. Strategic investments in infrastructure, tax incentives, and support for local entrepreneurship are fostering the growth of roadside services, eco-lodges, and cultural tourism. The emergence of a rural middle class, driven by tourism-related employment, is gradually reducing labour migration and strengthening local economies. A 2023 Gallup survey placed Tajikistan as one of the safest countries globally, while the UNWTO ranked it first for tourism growth.

Tourism has emerged as a dynamic sector with growing economic significance. Over the past decade, Tajikistan has evolved from a niche destination for adventure and eco-tourism into a multifaceted tourism hub offering historical, cultural, recreational, and business experiences. Service quality has improved, aligning with international standards. In 2024, Tajikistan welcomed 1.4 million international tourists, representing a 12% increase compared with 2019 and a 16.6% increase compared with 2023. The country now hosts 343 registered tourism service entities, including hotels, hostels, sanatoriums, and recreation centres. This expansion reflects both rising global interest in Tajikistan and national efforts to position the country as a competitive destination for cultural, ecological, and adventure tourism.

Despite this progress, Tajikistan's economy remains limited and vulnerable, heavily dependent on foreign aid, remittances, and external financing. Agricultural productivity is low, and food security is sensitive to global price shocks. Most farming is conducted on small-scale subsistence plots, and malnutrition remains a concern. Climate change and natural disasters further exacerbate these challenges, making resilience and sustainability central to future planning.

---

1   National Development Strategy of the Republic of Tajikistan for the Period Up To 2030, https://share.google/d1JCCpJCBeIrBYwiV.
2   Tourism Development Strategy in the Republic of Tajikistan for the period up to 2030, https://share.google/nEMNMAfNytrQ3E0Fi.

Within this context, the absence of a systemic approach to resource use, waste management, and sectoral interlinkages points to a critical development gap. The circular economy (CE) concept, emphasising resource efficiency, waste reduction, and regenerative practices, remains underutilised across key sectors including tourism, agriculture, and energy. The lack of institutional frameworks and coordinated strategies to embed circularity into national development planning presents a significant barrier to achieving long-term sustainability and resilience in Tajikistan.

From a policy perspective, the transition to CE offers a strategic pathway to address these interlinked challenges. By embedding circular principles such as resource efficiency, waste minimisation, and regenerative systems into national development planning, Tajikistan can unlock synergies across sectors. In particular, the tourism sector can serve as a catalyst for circular transformation by promoting sustainable food systems, renewable energy use, and community-based economic models.

2. Methodology and approach

2.1. Purpose

Tourism in Tajikistan is a growing sector with transformative potential, particularly in rural and mountainous regions. However, it faces structural challenges such as seasonal fluctuations, weak integration with agri-food systems, limited green certifications, and vulnerability to climate change.

This SWITCH-Asia Technical Advisory (TA) project was designed to support Tajikistan's transition toward a circular economy (CE) in the tourism and hospitality sector, with a strategic emphasis on food systems. The project was implemented between October 2024 and June 2025 through a structured, multi-phase process designed to generate actionable insights, foster stakeholder engagement, and co-create policy solutions. The methodology was grounded in strategic foresight and participatory processes, ensuring relevance to national realities and alignment with EU principles.

CE was selected as the guiding framework because it offers a systemic and future-oriented approach to the above-mentioned structural challenges by emphasising resource efficiency, waste reduction, and regenerative practices. Food systems were chosen as a strategic entry point because of their central role in tourism experiences and their potential to promote local value chains, sustainability, and responsible consumption.

To ensure long-term relevance and effectiveness, the project adopted a strategic foresight methodology, enabling stakeholders to anticipate future challenges, explore alternative development trajectories, and formulate forward-looking policy recommendations.

The project was carried out by means of a structured, multi-phase process.

2.2. Development of an Assessment Framework

A customised framework was created to examine sustainability practices in food use and production within the tourism and hospitality sectors, and it was focused on procurement, waste management, energy and water use, packaging efficiency, and linkages with local agriculture. This framework guided the design of interview questions and ensured consistency in data collection.

Stakeholder Interviews and a circular economy (CE) framework

A total of 21 structured interviews were conducted with representatives from government bodies, civil society, business associations, international organisations, and academia. A selection approach enabled the project to capture a wide range of perspectives across the tourism food nexus and to identify actionable entry points for circular economy integration. The interview protocol was structured around the CE framework, focusing on and aligning key thematic areas such as procurement and sourcing practices, waste management systems, infrastructure and service delivery, regulatory environments, and market dynamics. This alignment ensured that the data collected would contribute meaningfully to the broader objective of exploring circularity in tourism-related food systems. The stakeholder interviews provided qualitative insights into current practices, challenges, and opportunities for integrating CE principles into tourism-related food systems. The results of the interviews, as presented in Annex B,[3] provided a rich dataset that informed all of the participants of the next phase of the project scenario development. These insights served as a foundation for identifying key drivers of change, shaping future paths, and co-creating policy recommendations that would reflect both stakeholder priorities and national development goals.

---

3   See below, Annex B, Interview findings: Circular economy transition in Tajikistan's tourism and food systems.

Scenario development workshop

The scenario development phase represented a pivotal moment in the project's methodology, serving as the bridge between stakeholder insights and actionable policy design. Conducted through a two-day strategic foresight retreat in February 2025, this phase was designed to move beyond immediate challenges and explore long-term trajectories for sustainable tourism in Tajikistan.

At the core of this process was the *Future Triangle* methodology, a strategic foresight tool that enabled participants to analyse three key forces shaping the future:

- **The *pull* of a preferred future:** the collective aspirations for what Tajikistan's tourism sector could become by 2040
- **The *push* of present-day drivers:** current trends, innovations, and pressures influencing the sector
- **The *weight* of historical constraints:** legacy systems, institutional barriers, and cultural norms that might hinder progress

This structured and participatory approach allowed stakeholders to identify critical drivers of change, assess uncertainties, and construct plausible future scenarios reflecting both ambition and realism. The retreat fostered collaborative thinking and helped build a shared vision for a tourism sector that is economically vibrant, socially inclusive, and environmentally sustainable.

The importance of this phase lay in its ability to translate qualitative data into strategic foresight. It provided a platform for stakeholders to co-create future narratives, prioritise reforms, and align their visions with national development goals and international sustainability frameworks. By engaging diverse actors from government, civil society, business, and academia, the process ensured that the scenarios were both grounded in Tajikistan's realities and responsive to emerging global trends.

Moreover, scenario development was not an isolated exercise: it was a strategic tool that informed the next stages of the project, including the formulation of policy recommendations and investment priorities. It enabled the identification of the systemic reforms that are needed to support CE principles along with sustainable consumption and production (SCP) practices within the tourism and hospitality sectors.

Policy recommendations and validation

The development and validation of policy recommendations represented a strategic culmination of the project's methodology during which the insights gathered through stakeholder interviews and scenario planning were translated into practical, forward-looking solutions. This phase was not only about proposing ideas; it was about ensuring that those ideas were grounded in reality, aligned with national priorities, and endorsed by those who would implement them.

Following the identification of key challenges and opportunities in Tajikistan's tourism and food systems, a portfolio of policy options was crafted to support the transition toward circular tourism. These recommendations addressed critical areas such as legal reform, infrastructure development, green finance, vocational training, and community-based tourism. Each proposal was designed to reflect the principles of CE and SCP, while remaining sensitive to Tajikistan's institutional context and development goals.

What made this phase particularly significant was its consultative nature. The recommendations were not developed in isolation: they were presented to and refined through dialogue with a broad spectrum of stakeholders, including the Ministry of Economic Development and Trade, the Ministry of Justice, the Committee for Tourism Development, the National Association of Small and Medium Businesses (NASMB), and the Tourism Development Center (TDC). These consultations served as a validation mechanism, ensuring that the proposed measures were not only technically sound but also politically feasible and socially accepted.

This process of validation was essential for several reasons. First, it strengthened institutional coordination by aligning diverse actors around a shared vision for sustainable tourism. Second, it enhanced the resilience and adaptability of the proposed policies by incorporating feedback from those with operational and policy experience. Third, it increased the likelihood of successful implementation by fostering ownership and

commitment among key stakeholders.

Beyond its immediate outputs, the policy phase opened new avenues for systemic transformation. The recommendations laid the groundwork for scaling CE practices across tourism value chains, particularly in areas such as food sourcing, waste management, and energy efficiency. They also highlighted the need to build institutional capacity to support green certification, eco-tourism, and sustainable infrastructure development.

Perhaps even more significantly, the process highlighted the value of regional cooperation, pointing to opportunities for cross-border collaboration in developing harmonised standards and circular tourism routes. The importance of mobilising investment in low-impact, community-led tourism models that reinforce environmental stewardship and strengthen local economies was also emphasised.

By continuing to build on this foundation, Tajikistan is well positioned to emerge as a regional leader in circular and sustainable tourism. The policy phase was not a conclusion, but rather a strategic launchpad ensuring that the vision developed through strategic foresight would be translated into tangible, lasting change.

3. Findings and results

3.1. Development of the assessment framework

The initial phase of this analysis focused on the creation of a structured framework to examine sustainability practices related to food use and, where relevant, food production within the tourism and hospitality sectors. The assessment framework was designed to support a systematic exploration of how food systems interact with tourism operations, particularly through the lens of circular economy principles.

The circular economy (CE) in tourism builds on three core principles: substitution, efficiency, and circularity.

- **Substitution** promotes a shift from finite and polluting resources to renewable and low-impact alternatives, such as solar energy, sustainable materials, and locally sourced products
- **Efficiency** focuses on optimising resource use and operations across the tourism value chain, improving energy, water, and material management while enhancing service quality
- **Circularity** ensures that materials and resources remain in use through reuse, recycling, and regeneration, reducing waste and pollution

Together, these principles transform tourism into a regenerative sector minimising environmental deterioration and supporting sustainable local economies.

Based on the core principles, this framework then incorporated key dimensions such as food sourcing and procurement practices; waste management and reduction strategies; energy and water use in food preparation and hospitality services; packaging and material efficiency; and linkages between tourism enterprises and local agricultural producers.

To facilitate stakeholder engagement, the assessment framework was accompanied by a set of guiding interview questions. These questions were intended to draw out insights into current practices, perceived challenges, and opportunities for integrating CE approaches within the sector. The questionnaire was comprehensive and contextually relevant. While some questions were repeated, they nonetheless proved effective in opening up the discussion and enabling in-depth dialogue. Stakeholders were able to reflect on existing systems and articulate perspectives on sustainability, resource use, and circularity in food-related tourism services.

The assessment framework provided a consistent structure for data collection and analysis. It served as a foundational tool for subsequent phases of scenario development and policy formulation, ensuring that the process was grounded in sector-specific realities and aligned with the overarching objective of supporting a CE transition.

3.2. Data collection and briefing reflections

The analytical foundation of this assessment was established through a series of 21 structured interviews conducted with representatives from institutions and organisations directly or indirectly engaged in the tourism and food sectors. These interviews were designed to gather qualitative insights into existing practices, perceived challenges, and emerging opportunities related to food sustainability within the tourism and hospitality context.

The interview protocol was structured around the circular economy (CE) framework, focusing on key thematic areas such as procurement and sourcing practices, waste management systems, infrastructure and service delivery, regulatory environments, and market dynamics. This alignment ensured that the data collected would contribute meaningfully to the broader objective of exploring circularity in tourism-related food systems.

The selection of interview participants was guided by the need to capture a diverse range of perspectives across the tourism and food nexus. Stakeholders were identified based on their institutional relevance, sectoral expertise, and their role in shaping or influencing policy, operations, or community-level practices.

The target groups included the following.

Government Actors

- Ministry of Economy Development and Trade of the Republic of Tajikistan
- Ministry of the Agriculture of the Republic of Tajikistan
- State Committee on Investment and State Property Management of the Republic of Tajikistan
- Committee on the Tourism development under the Government of the Republic of Tajikistan
- Committee for Environmental Protection under the Government of the Republic of Tajikistan
- Agency of Innovations and Digital Technologies under the President of the Republic of Tajikistan

Associations

- National Association of Small and Medium Businesses (NASMB)
- Tajik Community Based Tourism Association (TCBTA)
- Tajik Association of Tour Organisations (TATO)
- Association of Restaurateurs and Hoteliers of Tajikistan

NGOs

- Tourism Development Center
- Bargi Sabz
- Little Earth

Private sector

- LLC 'Tavr'
- Rumi Hotel
- Greenhouse Hostel

International organisations

- Swiss Cooperation Office in Tajikistan
- European Bank of Reconstruction and Development
- United Nations Food and Agriculture Organization
- Center for International and Private Enterprise in Central Asia

Academy

- Russian Tajik Slavyanic University

The main interview findings are as follows.

Tourism sector overview and trends

In 2024, Tajikistan witnessed a record 16.7% increase in international tourist arrivals, attaining 1.4 million visitors, reflecting the country's rising appeal as a travel destination. A total of 343 tourism-related entities were operational, including hotels, hostels, sanatoriums, and recreational centres. Despite this progress, major gaps remain regarding the availability of online information, basic infrastructure, and tourism services, especially in remote areas like the Gorno-Badakhshan Autonomous Province (GBAO), Rasht Valley, and the Fann Mountains.[4]

The government aims for a sustainable tourism sector contributing significantly to GDP and job creation by 2030. Current priorities include improving transport and digital infrastructure, enhancing regional and international recognition, and promoting folk crafts and rural tourism. A strong policy framework and initiatives like visa-free regimes for 77 countries are in place to attract visitors and investors.

Sustainable tourism and green economy integration

Tajikistan is actively incorporating SCP and CE principles into the tourism sector, and they are embedded in the Strategy for the Development of the Green Economy (2023–2037),[5] with specific actions targeting eco-tourism infrastructure, community-based tourism, and responsible consumption practices. The Ministry of Agriculture and the Committee for Tourism Development advocate CE practices to enhance resource efficiency, reduce waste, and create competitive businesses.

Agrotourism is also emerging, supported by small enterprises and agricultural producers. However, systemic issues like inadequate waste management and the weak enforcement of environmental regulations persist. Domestic tourism often leads to environmental degradation due to littering and unsustainable practices. Awareness campaigns and stronger monitoring are needed to inculcate responsible tourism values.[6]

Challenges and gaps

 Despite strategic frameworks and donor-supported initiatives, challenges remain, including:[7]

- the seasonal nature of tourism (March–November peak)
- insufficient green certifications and lack of trusted eco-labels
- low awareness and capacity for environmental, social and governance (ESG) compliance among small and medium-sized enterprises (SMEs)
- limited integration between agri-food systems and tourism development

Climate change is further complicating development, and Tajikistan remains highly vulnerable to droughts, floods, and mudflows. The country ranks 117th globally in disaster risk and 9th for drought exposure. Environmental risks pose a significant threat to agriculture, food security, and tourism infrastructure.

Investment, financing, and policy environment

Efforts to finance green and sustainable tourism are growing, with support from the World Bank, the International Finance Corporation (IFC), Swiss Cooperation, and the Food and Agriculture Organization of the UN. Initiatives include:

- ESG training for SMEs
- climate risk tools for financial institutions
- microfinance products for green tourism and food enterprises

However, implementation barriers such as limited access to green finance, high initial costs, and lack of technical capacity hinder progress. A new ESG Accelerator is planned that would support green project development among SMEs.

---

4   https://ctd.tj/
5   https://medt.tj/en/strategiy-i-programmi/strategiya-razvitiya-zeljonoj-ekonomiki-v-respublike-tadzhikistan-na-2023-2037-gody.
6   See below, Annex B: Interview findings: Circular economy transition in Tajikistan's tourism and food systems.
7   Ibid.

Policy-wise, tourism has been prioritised through tax exemptions, customs privileges, and digital visa facilitation. Strategic documents like the National Tourism Strategy 2030 and the Green Economy Strategy provide strong guidance. Nonetheless, agrotourism-specific policies are lacking, and cross-sector coordination needs improvement.

Infrastructure and digitalisation

The digital transformation agenda (2025–2030)[8] for Tajikistan aims to enhance e-services, smart tourism infrastructure, and climate data monitoring. Initiatives include satellite data use, customs digitalisation, and e-government platforms. The Agency for Innovation and Digital Technologies is leading these efforts, but more formal integration into national programmes will be required.

The FAO supports digitalisation at the local level through rural information and communication technologies (ICT) training, crop monitoring, and business development. However, Tajikistan faces significant barriers in e-waste management, internet access in rural areas, and digital infrastructure rollout, particularly as regards 5G.

Conclusion

Tajikistan's tourism sector is on a strong upward trajectory, supported by a clear government vision, active donor engagement, and increasing global interest. However, to ensure long-term sustainability and resilience, the sector must address persistent environmental, financial, and institutional challenges, including climate vulnerability, limited infrastructure, low ESG compliance among SMEs, and weak integration between tourism and agri-food systems.

The findings underscore the importance of embedding SCP and CE principles into tourism development strategies, because sustainable and circular approaches offer a structured pathway to improve resource efficiency, reduce environmental impact, and strengthen local value chains. Emphasising green investment, regional cooperation, and digital innovation within the framework of SCP and CE will be essential to achieving Tajikistan's 2030 goals for a competitive, inclusive, and environmentally responsible tourism economy.

3.3. Scenario development and reflections

On 24–25 February 2025, a strategic foresight retreat was held in Varzob District, Tajikistan, bringing together 29 participants, all of whom were representatives of stakeholder groups previously interviewed, to explore future pathways for sustainable tourism and food systems. Through interactive exercises and group dialogue, they identified some 40 drivers of change likely to influence tourism over the next 15 years, with a strong focus on CE and SCP.

The retreat led to a shared vision for a tourism sector that is economically vibrant, socially inclusive, and environmentally sustainable. Four development pathways were explored.

- Digital-driven growth
- Investment-led transformation
- Community-based tourism
- Revival of traditional practices

Stakeholders collectively envisioned a future where tourism contributes 30% to GDP, supports year-round travel, creates quality jobs, leverages renewable energy, and adheres to green economy principles.

To carry out this vision, participants proposed adaptive reforms, including:

- Legislative updates
- Infrastructure improvements
- Sustainability-focused education
- Expansion of visa-free regimes

---

8   https://cs.gov.tj/en/the-internet-one-of-the-key-elements-of-the-digital-economy/

- Digital tourism services
- Support for niche tourism (agro, eco, social)

At the same time, several risks were identified: financial limitations, weak institutional coordination, lack of skilled personnel, climate threats, and administrative barriers. These obstacles underscore the need for inclusive governance, ongoing research, and robust monitoring.

Participants also examined emerging trends, such as:

- Growing demand for eco-friendly travel
- Digitalisation of services
- Demographic shifts
- Climate-related hazards
- Changing consumer preferences

These trends highlight the urgency of aligning national strategies with international standards, including ESG reporting, the Global Sustainable Tourism Council (GSTC), and green finance mechanisms.

3.4. Strategic directions forward

To guide sustainable transformation, five strategic priorities were identified.

1. **Policy and institutional alignment:** harmonise tourism, environmental, and rural development policies under a green and circular economy framework
2. **Human capital and education:** revise tourism education, enhance vocational training, and build capacity in sustainability and digital skills
3. **Infrastructure and innovation:** invest in eco-friendly infrastructure, expand digital platforms, and promote renewable energy in tourism zones
4. **Finance and investment:** improve access to green finance for SMEs, develop incentive-based tools, and strengthen ESG compliance
5. **Community-led development:** empower local tourism entrepreneurs, especially in rural and mountainous areas, ensuring inclusive and sustainable growth

In the following section, we present the key findings.

3.5. Probable scenarios for tourism development in the context of Tajikistan in 2040

During the foresight sessions, participants identified some 40 drivers of change that could influence tourism development over the next 15 years, with a focus on CE.

From the listed drivers of change, the participants selected two uncertainties for scenario planning using a 'matrix 2x2' method. These were identified as:

- Economic development
- Provision of professionals

The following scenario matrix was then developed (Figure 1).

RAPID ECONOMIC GROWTH

SHORTAGE OF PROFESSIONALS			FULL STAFFING

Scenario 1

The development of the tourism sector and its circular component occurs under rapid economic growth but with a shortage of professionals.

Scenario 2

Tourism and the circular economy, an integral part of the sector, are developing under rapid economic growth and the full provision of the industry with professionals.

Scenario 4

Tourism and the circular economy face a shortage of professionals and are forced to cope with economic stagnation.

Scenario 3

Tourism and the circular economy develop with full personnel provision but under economic stagnation.

ECONOMIC STAGNATION

Figure 1. Scenario matrix for tourism development in the context of Tajikistan-2040

Based on this context, the workshop participants came up with four scenarios.

1 Scenario 1. Digitalisation as a practical solution

Tajikistan is undergoing a remarkable economic transformation, driven by energy independence and strategic surplus sales to neighbouring nations. While this rapid development presents significant opportunities, it has also highlighted the urgent need for a skilled workforce. In response, the country is embracing digitalisation and automation as key solutions. This evolution has revolutionised the tourism sector, where a groundbreaking multilingual application now empowers locals to engage with visitors seamlessly, eliminating the need for traditional translators. Additionally, it has greatly enhanced logistics for food delivery from remote areas, with innovative online systems simplifying payment processes and tax contributions. New hotels and guesthouses are at the forefront of sustainability, integrating eco-friendly practices such as water purification and waste composting. To encourage circular economy initiatives, the government offers substantial tax incentives for up to five years. In this collaborative effort, both locals and tourists actively participate in reducing environmental waste, earning rewards through a dedicated app that can be redeemed for diverse services. This holistic approach not only boosts the economy but also fosters the commitment to a sustainable future.

2 Scenario 2. Tajikistan is an investors' paradise

Tajikistan is a country with attractive natural resources and a favourable business environment. By 2040, the Rogun hydroelectric power station reaches full capacity, which in turn results in extensive energy exports, strengthening the country's economy with financial flows. New opportunities for business, including tourism, have emerged. The growing demand for the labour force is first met by the return of migrants who had previously gone abroad in search of work, and next by young professionals seeking to find a place in their homeland.

Economic growth attracts new investors and entrepreneurs who receive tax incentives if they apply circular economy principles. Such an approach stimulates the use of environmentally friendly, innovative technologies, which support the conservation of natural resources and sustainable development. Tourism now uses 80% renewable energy sources; food products and services are fully certified; tourists receive a high level of services, including digital registration, individual tour planning, transportation booking; and much more. The revenue from tourism is evenly distributed between large cities and mountain villages, contributing equally to the country's prosperity, economic growth, and social stability.

3 Scenario 3: Developing the potential of the local community

Due to economic stagnation, the tourism industry has sought new development routes. Many professionals have launched private companies and collaborated with local communities to offer individual tours showcasing traditional economies in remote villages. Initially, tourists navigated challenging goat paths, but as interest grew, communities improved their tourism infrastructure. Collaboration with tour operators has led to a shift in food policies, with locals stockpiling supplies to cater to tourists, and the fostering of a new culture of hospitality through training provided by private companies and the Ministry of Tourism. These initiatives have also encouraged better waste management practices, resulting in separate waste collection and composting of food scraps, which has boosted organic production. Eventually the influx of tourists motivated the local youth to learn foreign languages and acquire new skills, such as mountain guiding, rafting, and first aid. Overall, these changes have significantly improved the economic situation of the community while promoting environmental consciousness.

4 Scenario 4. Reviving traditions, aiming for the future

The prolonged economic stagnation in the country has significantly hindered development across various sectors, leading to an exodus of labour migrants and young people leaving after graduation. This situation has created a shortage of qualified personnel, particularly in tourism. While large companies have exited the market, small family-owned businesses have thrived, offering food, accommodation, and tours in Tajikistan's mountainous areas, which attract tourists with their pristine nature. These family-run tourist operators have gained popularity through word-of-mouth, specialising in hiking, rafting, and gastronomic experiences. As mountainous regions benefit economically, local businesses are motivated to enhance infrastructure and services, focusing on waste processing and renewable energy sources. This revival of traditional practices allows the Tajiks to live in harmony with nature while preserving it.

3.6. Preferred future of tourism development in Tajikistan-2040

The Futures Triangle was used to come up with a preferred future, making it possible to build a vision of the desired developments and assess the burdens of the past and pushes of the present to advance or block participants vision. The analysis of the identified factor helps build five scenarios: 'Back to the past,' 'No change,' 'Minor changes,' 'Adaptive changes,' and 'Radical changes.' The participants' choice of one of the scenarios indicates what changes, in their opinion, the given industry needs today.

Summarising the responses of the workshop participants, the preferred future for the development of tourism in 2040 is the following 'Inspiring story'.

Inspiring story

By 2040, tourism has become the primary economic sector in Tajikistan, contributing a significant share of GDP. Improved infrastructure connects large cities and remote mountainous areas, boosting domestic tourism because citizens can explore their country easily. Environmental awareness is prevalent, with modern food industry standards ensuring high-quality, sustainable products and effective waste recycling efforts throughout the country. This commitment to sustainability attracts international tourists who appreciate nature. With a visa-free regime and a streamlined tourist package, travellers can conveniently plan and pay for their trips. Tajikistan has emerged as a hub for mountain tourism, featuring developed ski resorts, trained instructors, and unique accommodations like glamping. Geotourism and archaeological tourism are also rising, with initiatives like 3D museums highlighting the nation's rich history. The country offers all-season tourism, drawing increased interest and implementing visitor quotas. Overall, the future of Tajikistan's tourism looks bright, promising new adventures for tourists and residents.

When choosing options for implementing the preferred future, the audience was divided into two camps: those supporting adaptive changes (70%) and those advocating for radical changes (30%). The actual modifications and implied actions are described below.

Adaptive changes

Start with legislative reform, i.e. with a revision of the complex of special regulatory and legal acts that directly or indirectly regulate specific areas of tourism relations and the development and implementation of new quality and sustainability standards, taking into account past experience.

1. Create the appropriate infrastructure: construction of roads, tourist routes, a network of hotels, food outlets, installation of electric charging stations, construction of roadside hotels, motels, etc.

2. Change the educational process: involve practitioners in the learning process, along with employers, and consider their opinions. At the same time, it will be necessary to reorient tourism goals towards sustainable tourism (SDG 12) and engage in the widespread implementation of environmental education, starting with kindergartens.

3. In the energy sector, give preference to renewable energy sources.

4. Develop a visa-free regime with as many countries as possible.

5. Move to complete digitalisation, develop new digital platforms, online booking, digitalisation of all tourist zones, compilation of accurate maps, and move towards virtual tourism.

6. Implement the 'Open Skies': increase the number of flights via private and low-cost airlines. In addition, private aviation should be developed, and appropriate changes should be made to the legislation.

7. Create a joint Central Asian tour, the equivalent of the Golden Ring in Russia.

8. Provide preferential loans to tour operators and create an attractive investment climate for new ones.

9. Develop new directions for tourism. For example, agrotourism, wine tourism, or social tourism, i.e. tourism for the elderly, and prepare personnel, infrastructure, and services accordingly.

10. Popularise the country's tourism potential by creating video materials, blogs, and DVDs.

11. Adapt statistics to actual figures to obtain a realistic picture of budget revenues and the country's populatino in the future.

12. Revive the practice of trade union activity or implement it through modern associations, considering the new realities of the time.

13. Create park areas in cities to improve the environment.

14. Move hazardous production outside of the city and close factories that produce hazardous waste completely.

Radical changes

The basic premise is that tourism becomes the main priority of the economy. Therefore, the following scenario would apply.

1. A permanent working group is created to develop a strategy for transitioning to a solely tourism-oriented economy. Government bodies, local historians, researchers, and other stakeholders participate in this work. In addition, Tourism Committees are created in all ministries to coordinate and implement joint efforts.

2. Educational programmes should be expanded: they should aim for future professionals and everyone's tourism literacy.

3. Focus on developing new, unpopular, or unknown tourism regions.

4. A new marketing, including social advertising, public advertising, documentaries, etc., would need to be developed and implemented.

5. Start developing educational tourism for all age groups, not just schoolchildren, to introduce them to the country's history – past, present, and future.

6. Develop the service sector, including preparing and developing traditional 'transport' – horses, mules, donkeys – for e.g. mountainous, extreme terrain, and ecological tourism needs.

These measures will significantly help improve Tajikistan's tourism sector, attract more tourists, and create a strong competitive environment for businesses. Success would require continuous interaction between government agencies, the private sector, and communities.

3.7. Implementation risks

The proposed scenarios and changes imply certain risks in their implementation.

When implementing *adaptive changes,* **the** risks may include:

1. Coordination of legislation and its implementation

- Process participants can shift to developing legislation favourable to themselves, missing the interests of other departments and the private sector.
- Without an effective monitoring system, good plans may remain unimplemented.

2. Financial

- Lack of financial resources may make it challenging to implement the plan.
- If the banking sector is not restructured, its system and range of services will hinder the implementation.

3. Personnel

- The lack of qualified personnel to work in education, media, journalism, and the tourism sector will not allow achieving high-quality results.
- High staff turnover calls into question the fulfilment of set plans.

4. Ecological

- Climate change continues on a global scale; for example, the melting of glaciers will not stop, and we can deprive the country of ski tourism.
- Increased tourist flow can lead to an environmental overload (soil load, increased waste, carbon footprint).

5. Political

- Interregional relations are not always stable, which can negatively affect the implementation of adaptive changes

If *radical changes are implemented*, the risks may include the following.

1. Psychological risks

- Radical changes force people to leave their comfort zone.
- When work has been going in one direction for 30 years, changing this path and then moving in another is always difficult; there will be opposition and resistance.

2. Financial risks

- Changes always require investments, and there may be insufficient money for the proposed plans.
- Today, the main funds come from Western or Chinese investors, which is also not an unstable source of financing.

3. Research risks

- An evidence base is needed to justify plans.
- Therefore, research must be carried out, and without an evidence base, it will not be possible to convince all stakeholders that the plan should be implemented.

4. Administrative risks

- a large number of participating parties raises the risk of poor cooperation and coordination of joint actions

5. Security risks

- When considering access issues, permissions (for filming, flights, etc.), the security issue can either come to the forefront and overshadow all other components, or, on the contrary, fade away and remain in the shadows.
- In addition, rapidly changing technologies require regular training and adaptation, which can be difficult for some professionals and tour operators.

3.8. And that's why…

It is necessary to carefully consider strategies to minimise risks, which in turn will allow the formation of a sustainable and profitable tourism industry that contributes to the development of Tajikistan as a whole. Successful implementation of radical changes will require deep analysis, the participation of all stakeholders, and the use of international experience to avoid possible negative consequences.

4. Policy development and validation reflections

The final phase of the project focused on transforming strategic insights into a targeted policy framework aimed at accelerating Tajikistan's transition toward circular and sustainable tourism. Drawing directly from stakeholder interviews and scenario planning, the process resulted in a comprehensive set of policy recommendations that address the structural, operational, and regulatory dimensions of the tourism and hospitality sectors.

The development of policy recommendations was guided by a participatory and consultative process, designed to ensure that proposed measures were not only technically sound but also aligned with Tajikistan's strategic priorities and institutional realities. This phase was essential in translating the project's analytical findings into credible, actionable policies that could be realistically implemented and sustained.

The validation process of the proposed policy recommendations has revealed a strong alignment with national development priorities and a high degree of stakeholder consensus. This section outlines the contributions of key institutions and organisations, each offering targeted insights and strategic proposals to support Tajikistan's transition toward a green, inclusive, and innovation-driven economy.

The Ministry of Economic Development and Trade of the Republic of Tajikistan has confirmed that the recommendations presented in the advisory document are well-aligned with the country's sustainable development agenda. Many of the proposals have already been incorporated into the Draft National Development Program (NDP) for 2026–2030, highlighting their relevance and timeliness.

Key areas of alignment include the promotion of green and sustainable tourism, digital transformation, and environmental certification. The Ministry supports the development of emerging tourism sectors such as agrotourism, ecotourism, and educational tourism, particularly in mountainous and border regions. Emphasis is also placed on enhancing transport accessibility, fostering low-carbon mobility, and strengthening regional branding. The Ministry further advocates for the integration of circular economy principles into tourism development, with a focus on resource efficiency and sustainability. The importance of engaging local communities, supporting microbusinesses, and promoting sustainable crafts as part of a broader strategy to ensure inclusive economic growth is also stressed.

Looking ahead, the Ministry recommends further exploration of transboundary ecological tourism and digital ecosystems and proposes the establishment of a multi-stakeholder implementation platform to coordinate efforts, monitor progress, and facilitate knowledge exchange. Additionally, the development of a National Sustainability Dashboard has been suggested to support evidence-based policymaking and track the impact of green reforms. The expert indication is that it would need a proposed indicator set, data sources, frequency, and the naming of a responsible agency.

The Ministry of Justice has identified a critical opportunity to advance the implementation of the Green Economy Strategy (2023–2037) through targeted legislative reform. As outlined in its Action Plan for 2023–2025, the Ministry is committed to aligning national legal frameworks with circular economy principles and sustainable tourism objectives. This effort is intended to ensure that national legislation is aligned with international best practices and effectively supports Tajikistan's transition toward a sustainable and inclusive economy. The Ministry emphasises the importance of embedding these reforms within the broader framework of the National Development Strategy and the forthcoming NDP 2026–2030 to ensure policy coherence and maximise outcomes.

The **Committee for Tourism Development under the Government of the Republic of Tajikistan** has initiated the development of a strategic plan in collaboration with the United Nations World Tourism Organization (UNWTO), aimed at promoting sustainable tourism models, enhancing human capital, and implementing environmental standards across the sector. This initiative reflects the Committee's commitment to aligning national tourism development with global best practices, and underscores the importance of coordinated efforts among domestic stakeholders and international partners to ensure the effective implementation of sustainability principles. The Committee is confident that such collaboration will generate tangible benefits

for the national economy and improve the well-being of local communities.

The **National Association of Small and Medium Businesses (NASMB)** has put forward a comprehensive set of policy recommendations focused on enabling sustainable tourism and fostering the creative economy, while advancing circular economy principles. These recommendations are closely aligned with the strategic priorities of the NDP 2026–2030 and emphasise inclusive growth, environmental sustainability, and regional cooperation. The Association calls for the creation of an enabling environment for tourism development, particularly through support for private sector initiatives and improvements in service quality. The importance of promoting traditional crafts and creative products to strengthen Tajikistan's cultural identity and tourism brand are highlighted. Sustainable tourism models, especially ecotourism and community-based tourism, are identified as key drivers of local development. The NASMB recommends the establishment of tourism clusters to serve as platforms for implementing these models, enhancing visitor experiences, and promoting environmental conservation.

To ensure quality and sustainability, the NASMB advocates for the development of national ecological certification standards, including the 'Tourist Friendly' and 'Zero-Waste Tourism' programmes. It also emphasises the need for training in sustainable tourism and eco-management, the creation of ecological routes, and the promotion of rural and ethnographic tourism. Raising awareness among tourists and operators about circular economy principles is considered essential for long-term results. Moreover, the circular economy is proposed as a strategic national priority, and its application across agriculture, industry, construction, energy, and tourism is seen as a transformative approach to resource efficiency and waste reduction. Achieving this potential will require regulatory support, financial incentives, innovation investments, and public awareness campaigns.

Finally, the NASMB calls for enhanced regional and cross-border cooperation to develop tourism value chains and establish at least ten ecotourism and CBT sites across the country. Certified tourism clusters should be integrated into regional development strategies to contribute to the environmental and economic goals of the National Development Program (NDP) 2026–2030.

The **Tourism Development Center (TDC)** underscores the need for foundational reforms to unlock the full potential of Tajikistan's tourism sector. Central to this need is the restructuring of the Committee for Tourism Development so that a more efficient and clearly defined institutional framework is established. Such reform is essential to ensure that tourism policies are implemented effectively and by qualified professionals.

The TDC also stresses the importance of integrating circular economy principles into tourism development, which includes not only promoting sustainable practices but also ensuring that supporting systems such as ecological certification are transparent, well-regulated, and managed by trained personnel. Without proper oversight and capacity-building, these initiatives risk being misused or becoming ineffective. By prioritising institutional reform, capacity development, and the responsible implementation of green practices, Tajikistan can build a tourism sector that is both economically resilient and environmentally sustainable.

To recapitulate, the validation process during the project not only strengthened the credibility of the policy framework but also fostered institutional ownership, increasing the likelihood of successful adoption and long-term results. It demonstrated that inclusive dialogue and cross-sectoral engagement are critical to designing policies that are both visionary and implementable. The policy framework outlines a practical roadmap for achieving a low-impact, inclusive, and circular tourism economy by 2040. It is structured around five strategic pillars, each one addressing specific challenges and unlocking opportunities for sustainable growth in Tajikistan's tourism sector, which are discussed below.

Pillar 1. Policy framework proposal

This pillar introduces mechanisms to embed circularity into tourism operations and product design.

- Promotion of zero-waste certification for tourism operators and events
- Expansion of sustainable tourism models that minimise resource consumption and waste generation through eco-friendly infrastructure, local sourcing, and regenerative practices that preserve Tajikistan's cultural and natural heritage
- Incentives for product lifecycle extension and circular packaging systems to reduce single-use plastics

- Recommendation to establish a legal framework for green certification, enabling market-based tools for sustainable resource management

Pillar 2. Green infrastructure

Integrating circular principles into tourism infrastructure development is the focus of Pillar 2.

- Implementation of environmental standards that encourage reuse, recycling, and responsible resource management, ensuring that tourism growth supports ecological resilience
- Legislative amendments to define the status of renewable energy entities and support microgeneration within community-based tourism
- Tariff reforms and fiscal incentives to accelerate the adoption of renewable energy technologies
- Advocacy for modular eco-designs and the use of local and recycled materials in tourism infrastructure projects

Pillar 3. Community-based tourism

This pillar strengthens local engagement and entrepreneurship.

- Modernisation of tax incentives for small guesthouses and hostels to stimulate rural tourism
- Emphasis on green skills training in hospitality, waste management, and eco-tour guiding
- Targeted support for eco-guides and artisans, enhancing local entrepreneurship and cultural tourism

Pillar 4. Smart resource management

Enhancing efficiency and accountability in resource use is the aim of Pillar 4.

- Development of human capital through education and training programmes that empower communities and tourism professionals with skills in sustainable operations, digital tools, and green entrepreneurship
- Implementation of monitoring systems for emissions, energy, and water use
- Introduction of impact-based taxation for high-emission tourism activities, with revenues reinvested in sustainability programmes

Pillar 5. Low-impact mobility

This pillar promotes sustainable transport solutions.

- Investment in electric vehicle (EV) infrastructure and cycling corridors across tourism hubs
- Launch of a Digital Green Travel Pass to incentivise low-carbon transportation options

4.1. Addressing risks and enabling implementation

The targeted policy framework identifies risks associated with both radical reforms (e.g. high financial requirements, complex coordination) and adaptive transitions (e.g. legal misalignment, workforce gaps, ecological overload). To mitigate these risks, the following enabling strategies are proposed:

- Formation of multi-stakeholder task forces to oversee policy alignment and implementation
- Promotion of regional eco-tourism alliances to harmonise standards and share best practices
- Integration of sustainability and circular economy principles into national education curricula to build a green-ready workforce by 2040

5. From vision to tangible results: A strategic outlook on circular tourism in Tajikistan

5.1. Vision

The final section of this report outlines a strategic outlook for Tajikistan's transition to circular and sustainable tourism. The importance of aligning national policy reforms, stakeholder engagement, and regional cooperation to support the broader shift toward a circular economy and long-term sustainable development will be highlighted.

Advancing Tajikistan's 2040 Vision for circular and sustainable tourism will require a carefully coordinated, multi-level approach aligned with national development priorities and regional cooperation frameworks. The recommended next steps emphasise both high-level policy reform and practical, community-based implementation measures. Among these, several will necessitate especially thoughtful engagement with policy decision-makers and institutional partners to ensure successful adoption and long-term sustainability.

Key actions that will require particular attention include the following.

- **Convening a national dialogue on circular and sustainable tourism**, which involves aligning multiple ministries, parliamentarians and stakeholders under a unified platform
- **Introducing legal and fiscal reforms**, such as defining green certification standards and enabling regulatory frameworks for renewable energy microgeneration
- **Accelerating digital transformation in tourism** to promote the adoption of digital tools and platforms that will enhance service delivery, visitor experiences, and data-driven decision-making; smart tourism systems, digital marketing, and e-certification mechanisms to support sustainability and competitiveness should be included
- **Establishing multi-stakeholder task forces**, to ensure coordination, shared ownership, and effective oversight of implementation
- **Mobilising strategic investment and donor support**, given the financial requirements of transitioning to low-impact infrastructure and green technologies

These sensitive but essential measures must be guided by inclusive dialogue, clear communication, and strong institutional leadership.

5.2. Impact and strategic value

This policy framework provides a clear, actionable pathway for embedding circular economy principles into Tajikistan's tourism sector and is aligned with the Draft National Development Program 2026–2030, ensuring policy coherence and long-term relevance. By transforming strategic foresight into a concrete implementation agenda, Tajikistan will be positioned as a regional leader in circular and sustainable tourism.

Key strategic directions include the following.

- Scaling sustainable practices across tourism, food, and green value chains
- Strengthening institutional capacity for green certification, infrastructure development, and local entrepreneurship
- Mobilising investment in community-based tourism models, including guesthouses/homestays, handicrafts, and agro-tourism
- Building and reinforcing market linkages between tourism, agriculture, and environmental sectors to create inclusive and resilient rural economies
- Fostering regional cooperation for cross-border eco-tourism and harmonised sustainability standards

- Accelerating digital transformation in the tourism sector by promoting smart tourism solutions, digital marketing, e-certification systems, and data-driven planning tools to improve service quality, transparency, and competitiveness

To ensure successful implementation, these actions must be supported by policy reform that promotes circularity, sustainability, and local empowerment. A multi-stakeholder communication platform engaging government bodies, local communities, private sector actors, civil society, and international partners will be required. Through inclusive dialogue and coordinated action, policy recommendations can effectively be translated into practice. If implemented effectively, the framework will be able to deliver transformative results across multiple sectors.

- Environment: reduced pollution and resource pressure through circular practices will help preserve fragile ecosystems, especially in mountainous and rural areas
- Economy: strengthened local entrepreneurship and green job creation will diversify income sources and reduce vulnerability to seasonal tourism cycles
- Society: enhanced community participation and cultural preservation will foster inclusive development and intergenerational continuity
- Digital innovation: driving digital innovation in tourism will improve service quality, transparency, and data-driven decision-making, while smart tourism platforms, e-certification systems, and digital marketing tools will enhance visitor experiences and position Tajikistan as a modern, sustainable destination
- Regional influence: Tajikistan's leadership in circular tourism can catalyse broader cooperation across Central Asia, encouraging harmonised standards and shared sustainability goals

In essence, this framework not only elevates Tajikistan's tourism sector but will also serve as a blueprint for sustainable development across the region.

6. Concluding observations

Tourism and the food sector are deeply interconnected, particularly in rural and community-based models. In Tajikistan, where agriculture and culinary traditions are integral to local identity, this link presents strong opportunities for circular economy (CE) integration. Tourism can drive demand for locally produced food, thus supporting small-scale farmers, reducing imports, and cutting the carbon footprint of long-distance transport.

In a circular context, synergies arise through farm-to-table experiences, agrotourism, and the use of organic and seasonal produce in the hospitality sector. Food waste from tourism facilities can be reused through composting or biogas generation, contributing to closed-loop systems.

Although Tajikistan's tourism sector is expanding, seasonal fluctuations, limited green certifications, and weak links to agri-food systems persist as important issues. Climate risks and infrastructure gaps remain challenges. But despite the seeming problems, institutional interest in circular approaches – especially in agrotourism, eco-tourism, and digitalisation – is growing.

This report recommends developing legal frameworks for green certification, promoting zero-waste tourism, expanding vocational training in green skills, improving access to green finance, and strengthening community-based initiatives. These measures would position Tajikistan as a regional leader in circular and sustainable tourism.

With its shared vision and commitment to cooperation, Tajikistan is capable of building a tourism sector grounded in circular economy principles, where resources are used efficiently, waste is minimised, and local value chains are strengthened. Through regional collaboration, harmonised standards, and knowledge exchange, the country can demonstrate how environmentally responsible development and economic opportunity can go hand in hand.

ANNEX A. Probable scenarios for tourism development in Tajikistan-2040

During the foresight workshops, participants identified about 40 drivers of change that could influence the development of the tourism industry in light of the circular economy (CE) over the next 15 years. From the listed drivers, the participants selected two uncertainties for further scenario construction using the '2x2 Matrix' method. In their opinion, the economic and technological spheres will have the greatest influence on the further development of the tourism sector. The following were selected from these areas: economic development and level of staffing.

The following matrix was obtained.

RAPID ECONOMIC GROWTH

Scenario 1	**Scenario 2**
The development of the tourism sector and its circular component occurs under rapid economic growth but with a shortage of professionals.	Tourism and the circular economy, an integral part of the sector, are developing under rapid economic growth and the full provision of the industry with professionals.
Scenario 4	**Scenario 3**
Tourism and the circular economy face a shortage of professionals and are forced to cope with economic stagnation.	Tourism and the circular economy develop with full personnel provision but under economic stagnation.

(Left axis: SHORTAGE OF PROFESSIONALS; Right axis: FULL STAFFING)

ECONOMIC STAGNATION

Figure 2. Scenario matrix for tourism development Tajikistan-2040

Based on this context, four scenarios were developed.

1 | Scenario 1. Numbers decide everything

Tajikistan's rapid economic growth has been achieved by ensuring energy independence and selling surpluses to neighbouring countries. The pace of economic development exceeds the capacity to train the required number of specialists, so the process of digitalisation and robotisation is getting started everywhere. First of all, this trend has affected the service sector. New technologies have radically changed the tourism sector. The range of online services provided to tourists has expanded. The application developed by Tajik specialists works in all major languages of the world. Thanks to voice services, there is no longer a need for translators. The work of tour guides has also changed; they are now guides and curators in hard-to-reach mountainous areas, where, the local population actively uses this offer and communicates with guests in their native language.

Digitalisation has helped solve many logistical problems in the delivery of food products produced in remote areas. Large companies have emerged to collect and certify products. Moreover, the entire process is controlled online, facilitating both the procedure for settlements and tax deductions to the state budget. Many new hotels and guest houses already include in their plans facilities for water purification, composting food waste and storing glass containers. For existing tourist facilities that want to implement elements of CE, the state provides tax breaks for 5 years. Local residents and visiting tourists themselves are actively involved in the process of preserving the environment from pollution and waste. Everyone has the opportunity to earn bonuses in a special application and then spend them on various types of services.

2   Scenario 2. Tajikistan is an investment paradise

Tajikistan is a country with not only attractive natural resources, but also favourable conditions for doing business. By 2040, the Rogun hydroelectric power station will have reached full capacity, producing extensive energy exports, and thereby strengthening the country's economy with financial injections. New opportunities for business, including tourism, have emerged. The growth in demand for labour is met, on the one hand, by the return of migrants who previously went abroad in search of work, and on the other, by young professionals seeking to find their place in their homeland.

Economic growth attracts new investors and entrepreneurs who are provided with tax incentives in the event of the implementation of CE principles in their enterprises. This stimulates the use of environmentally friendly, innovative technologies, which supports the conservation of natural resources and sustainable development. The tourism sector has switched to 80% renewable energy sources, food products and services are fully certified, and tourists are provided with a high level of service including digital hotel registration, individual tour planning, transportation booking, and much more. Revenues from the tourism business are evenly distributed between large cities and mountain villages, equally contributing to the prosperity of both. This development model contributes not only to economic growth, but also to the improvement of the social situation within the country.

3   Scenario 3. Developing the potential of the local community

As a result of economic stagnation and lack of investment, the tourism industry has had to look for new ways to develop. Over the previous years, a sufficient number of tourism professionals had been trained, and they now begin to actively establish private companies and successfully cooperate with local communities.

It all started with individual tours offering guests an opportunity to get acquainted with the traditional economy of the villages, which was based on cattle breeding, agriculture and household vegetable garden plots. At first, tourists had to walk along goat paths, sometimes even at risk to their lives. Over time, the popularity of such places with authentic culture began to grow, and local communities began to improve the infrastructure. Then, thanks to coordination with private tour operators, the food policy of the community changed, and there is a reorientation from the traditional provision 'only for oneself' to the creation of reserves that meet the needs of tourists. A new culture of hospitality begins to emerge thanks to trainings conducted by private tour companies, associations, and the support of the Ministry of Tourism. As a result, the attitude towards waste changes. One of the goals of the trainings was to improve the economic situation of the local community: spend less, save more. And this goal was achieved.

In addition, the increasing flow of tourists from year to year has made people think about a more careful and protective attitude towards the environment: waste separation has become the norm, all food waste goes to farming compost, which in turn increases the production of environmentally friendly products. Plastic waste undergoes basic recycling, and well-established logistics help deliver it to the nearest processing plants. Young people are actively studying foreign languages, mastering new professions such as rafting and paragliding, and more individuals train as mountain trail guides, drivers in extreme conditions, cartographers, and safety and first aid instructors.

4   Scenario 4. Reviving traditions, aiming for the future

The economic stagnation that has been going on for many years has seriously affected the development of all spheres of public life in the country. The flow of labour migrants remains consistently high, and young people, having received an education, are in a hurry to leave the country. In all spheres of public life there is thus an acute shortage of qualified personnel, including in the tourism sector. Large companies have left the market. Tourists are served mainly by small, private, often family-owned businesses. These are guest houses that offer their clients not only food and accommodation, but also tours to mountainous areas where their relatives live. Pristine nature, clean air and environmentally friendly products continue to attract tourists from all over the world to Tajikistan.

Over time, such a family tourist business begins to gain popularity thanks to unobtrusive advertising circulated by the tourists themselves among their friends. Certain places begin to specialise in specific services: mountain hiking, rafting, hunting, gastronomic tourism – everything depends on the experience and skills of a particular family in hosting tourists. Gradually, mountainous areas begin to receive *higher* profits than cities, which are only transit points for arriving guests. The growing needs of local businesses force villagers to think about improving their infrastructure, living conditions and services, how to get rid of their waste flows and how to ensure an uninterrupted supply of electricity. Realising that a healthy environment is the main asset of their business, owners begin to invest in the processing of non-food waste, in small hydroelectric power plants and other renewable energy sources, and in the development of folk crafts and trades that do not harm nature and the environment. In essence, there is a revival and adaptation to new conditions of centuries-old traditions that had already helped the Tajik people live in harmony with the natural world and thus preserve it.

Preferred future of tourism development in Tajikistan-2040

A *Futures Triangle*[9] was used, making it possible not only to build a vision of the desired development, but also to assess what remains as a legacy from the past and what exists in the present to advance or block our vision. After analysing the identified facts, five possible scenarios can be built: 'Back to the past', 'No change', 'Minor changes', 'Adaptive changes' and, finally, 'Radical changes'. The participants' choice of one of the scenarios indicates what changes, in their opinion, the given industry needs today.

Summarising the responses of the participants of the seminar in Tajikistan, the preferred future for the development of the tourism sector in 2040 looks like this story.

Inspiring story

In 2040, tourism will become the main direction of economic development in Tajikistan, making up 30% of the country's GDP. Developed infrastructure covers not only large cities, but also remote mountainous areas, which, together with the increase in income of the population, has led to the prosperity of domestic tourism. Every citizen can easily use convenient transport routes, independently explore their native land and enjoy their vacation, discovering the beauty of their country.

Environmental awareness has become the norm. Modern sustainability standards have been introduced in the food industry to ensure high quality products and facilitate their international certification. All regions of the country are actively engaged in waste recycling, and recycling plants operate not only in Dushanbe, but also in every district. This not only improves the environmental situation, but also makes Tajikistan attractive to international tourists who care about nature. And their flow is growing year after year, since Tajikistan has become a tourism hub, located at the crossroads of Central Asian countries, Afghanistan, China and other countries. Thanks to the visa-free regime and a single tourist package, travellers can easily plan their trips and enjoy all the delights of this unique region. Full digitalisation of all services – from registration to payment – has made the travel process as convenient as possible. Tourists can easily create their routes without leaving home, as well as instantly pay for all services.

Tajikistan has become a Mecca for mountain tourism. Ski resorts, hotels and trails are well developed, while trained instructors and modern equipment provide safety and comfort for outdoor enthusiasts. In addition, the country is known for its glamping and capsule houses, which allow you to enjoy magnificent natural landscapes and the starry sky. Geotourism has also become an important part of the tourism strategy. The creation of geoparks allows you to study unique mountain landscapes without harming nature. Archaeological tourism is thriving thanks to 3D museums that showcase the country's rich historical heritage.

Tourism in Tajikistan has become all-season, as a large number of tourists now know that all four seasons can be seen in one territory. In this regard, a quota is introduced for visiting the country, thereby emphasising the high interest in Tajikistan as a tourist destination. Thus, the future of tourism in Tajikistan looks bright and promising, opening new horizons for travellers and residents of the country.

---

9   https://www.sitra.fi/en/tool/the-futures-triangle/

When it came to choosing options for steps to implement the preferred future, the audience was divided into two camps: those supporting adaptive changes (70%) and those advocating for radical changes (30%). The actual changes and implied actions are described below.

Adaptive changes

1. We need to start with legislative reform, i.e. with a revision of the complex of special regulatory and legal acts that directly or indirectly regulate certain areas of tourism relations, as well as with the development and implementation of new standards, taking into account past experience.

2. Create the appropriate infrastructure: construction of roads, tourist routes, a network of hotels, food outlets, installation of electric charging stations, construction of roadside hotels, motels, etc.

3. Change the educational process: involve practitioners in the learning process, employers and take their opinions into account. At the same time, it is necessary to reorient tourism goals towards sustainable tourism (United Nations SDG 12), and engage in the widespread implementation of environmental education, starting with kindergartens.

4. In the energy sector, give preference to renewable energy sources.

5. Develop a visa-free regime with as many countries as possible.

6. Move to full digitalisation, develop new digital platforms, online booking, digitalisation of all tourist zones, compilation of accurate maps and move towards virtual tourism.

7. Implement the 'Open Skies' programme: increase the number of flights via private airlines and low-cost airlines. In addition, develop private aviation and make appropriate changes to the legislation.

8. Create a joint Central Asian tour, the equivalent of the Golden Ring in Russia.

9. Provide preferential loans to tour operators and create an attractive investment climate for new tour operators.

10. Develop new directions in tourism. For example, agrotourism, wine tourism or social tourism, i.e. tourism for the elderly, and accordingly prepare personnel, infrastructures, and services.

11. To popularise the country's tourism potential and the country itself, create video materials, blogs, and other forms of communication tools.

12. Adapt statistics to actual figures and numbers in order to have a realistic picture of budget revenues and the country's population in the future.

13. Revive the practice of trade union activity or implement it through modern associations, taking into account the realities of the time.

14. Create park areas in cities to improve the environment.

15. Move hazardous production practices outside the city and then completely close factories that produce hazardous waste.

Radical changes

The basic premise is that tourism becomes the main priority of the economy. This situation would imply the following.

1. A permanent working group is created to develop a strategy for the transition to 'total tourism'. Not only government bodies, but also local historians, academic historians and all interested parties would participate in this working group. In addition, Tourism Committees are created in all ministries to coordinate and implement joint efforts.

2. Educational programmes are expanded: they should be aimed not only at training future professionals, but also at expanding the whole population's tourism literacy.

3. Develop new tourism regions that are not popular now or are as yet unknown.

4. A new marketing programme would be developed and implemented, including social advertising, public advertising, documentaries, etc.

5. Develop educational tourism for all visitors, not just schoolchildren, in order to introduce them to the country and its history, past, present and future.

6. Develop the service sector, including the preparation and development of traditional 'special transport' for the needs of those in the mountains, and include extreme and ecological tourism.

These measures will help significantly improve Tajikistan's tourism sector, attract more tourists and create a strong competitive environment for businesses. To ensure success, there would need to be continuous interaction among government agencies, the private sector, and the communities.

Implementation risks

The proposed scenarios and changes imply certain risks in their implementation.

If **adaptive changes are implemented**, the risks could be the following.

1. Coordination and implementation of legislation: Participants in the process can develop laws for themselves, without taking into account the interests of other departments and the private sector; without an effective system for monitoring implementation, good plans may remain unimplemented.

2. Financial: Lack of financial resources may make it difficult to implement the plan; if the banking sector is not restructured, its structure and range of services will hinder the implementation of plans.

3. Personnel: The lack of qualified personnel to work in the field of education, media, or journalism, aimed at the tourism sector, will not make it possible to achieve high-quality results; high staff turnover calls into question the fulfilment of set plans.

4. Ecological: Climate change continues on a global scale, for example, and the melting of glaciers does not stop and the country is deprived of ski tourism; an increase in tourist flow can lead to an increase in environmental load (soil load, increased waste, carbon footprint).

5. Political: Interregional relations are not always stable, which can negatively affect the implementation of adaptive changes.

If **radical changes are implemented**, the risks could be the following.

1. Psychological risks: radical changes force people to leave their comfort zone. When work has been going in one direction for 30 years, changing this path and moving to another direction is always difficult, there will be opposition and resistance.

2. Financial: changes always require investments, and there may not be enough of them for the proposed plans. Today, the main funds come from Western or Chinese investors, which is also not an unstable source of financing.

3. Research: to justify plans, an evidence base is needed, therefore research work must be carried out, and without an evidence base it will not be possible to convince all interested parties that the plan should be implemented.

4. Administrative: with a large number of participating parties, there is a risk of not being able to cope with the coordination of joint actions.

5. Security: When considering issues of access, permissions (for filming, flights, etc.), the issue of security can either come to the forefront and overshadow all other components, or, on the contrary, fade into the background and remain in the shadows. In addition, constantly changing technologies require regular training and adaptation, which can be difficult for some professionals and tour operators.

Preferred future and implementation outlook

The foresight process confirmed that Tajikistan's tourism sector aspires to evolve into an inclusive, low-impact, and innovation-driven pillar of the national economy by 2040. Participants of the scenario-building exercise envisaged a future in which tourism contributes significantly to GDP, operates on renewable energy, and provides dignified employment across regions. Digital technologies, local entrepreneurship, and the integration of environmental and cultural assets form the core of this preferred vision.

While this vision is both attainable and strategically sound, its success will depend on the country's ability to manage implementation risks through a circular economy (CE) approach. From this perspective, the transition towards the preferred scenario may face several vulnerabilities that, if unaddressed, could slow or distort progress. These include institutional fragmentation, limited access to green finance, skills shortages, operational data gaps, and environmental rebound effects associated with rapid infrastructure growth.

Institutional misalignment remains the most significant structural challenge. Tourism, environmental, and agricultural policies often evolve separately, resulting in inconsistent application of CE principles. Establishing a *National Framework for Circular and Sustainable Tourism* – ideally under the National Circular Economy Framework – supported by an inter-ministerial coordination mechanism would harmonise regulatory efforts and ensure coherent monitoring of CE targets.

Financial constraints present another major obstacle. The preferred scenario depends on sustained investment in renewable energy, eco-design, and waste management systems – areas where Tajik SMEs currently face limited credit access. A blended-finance mechanism, such as a *Green Tourism Investment Fund*, could provide the missing link between ambition and implementation. Tax reliefs and green-loan guarantees tied to measurable CE performance such as waste-reduction rates or renewable-energy shares would further align investment with sustainability objectives. Orientation towards local products might be also more financially preferred (although they might require investments).

Equally significant is the **absence of human capital**. A circular tourism economy requires staff trained not only in hospitality and management but also in resource-efficiency practices, waste minimisation and valorisation, and environmental procurement. Integrating CE modules into national vocational and university programmes and launching train-the-trainer initiatives through regional tourism centres would help build the skills base necessary for implementation.

Operational and data-management weaknesses could also undermine CE monitoring. Without clear indicators on energy, water, and material efficiency, policy enforcement and private-sector accountability remain limited. Introducing a *Digital Green Pass* or a similar CE performance-tracking platform would enable hotels and tour operators to report resource use transparently and align with international sustainability standards.

Finally, **environmental rebound risks,** where rapid infrastructure expansion increases rather than decreases material and energy use, must be prevented. All new tourism infrastructure should undergo life-cycle assessment and comply with eco-design standards. Applying visitor-carrying-capacity limits in sensitive areas and promoting adaptive reuse of existing facilities will help maintain ecological balance and preserve Tajikistan's natural and cultural heritage.

Table 1. Circular economy risk mitigation measures

Risk Category	Circular Economy- oriented Response
Institutional Misalignment	Establish National Circular Tourism Framework and inter-ministerial CE task force
Financial Constraints	Create Green Tourism Investment Funds; link fiscal incentives to CE performance indicators
Human-Capital Gaps	Integrate CE and sustainability modules into vocational education; expand training for SMEs
Operational and Data Gaps	Develop Digital Green Pass for CE performance monitoring; require annual sustainability reporting
Environmental Rebound	Mandate eco-design and lifecycle assessments for all new tourism infrastructure; apply visitor limits in fragile zones

In conclusion, the preferred 2040 scenario offers Tajikistan a coherent and forward-looking pathway for developing a tourism sector that is economically viable, socially inclusive, and environmentally regenerative. Nonetheless, its realisation requires embedding Circular Economy principles, i.e. substitution of finite resources, operational efficiency, and circular reuse, at all levels of planning and governance. By transforming risks into opportunities for innovation and investment, Tajikistan can position itself as a regional leader in circular and sustainable tourism, demonstrating that economic growth and environmental stewardship are mutually reinforcing goals.

ANNEX B Interview findings: Circular economy transition in Tajikistan's tourism and food systems

1. Introduction and purpose

This annex presents the detailed findings from 21 structured interviews conducted as part of the Technical Advisory (TA) *'Strategic Foresight for the Circular Economy in the Tourism and Hospitality Sector with a Focus on Food Systems'* in Tajikistan.

The interviews explored how actors across government, business, civil society, and academia understand and apply circular economy principles within tourism-related food systems. The objective was to identify current practices, challenges, and actionable opportunities for transitioning towards circular and sustainable tourism.

2. Methodological note

The interviews were conducted between December 2024 and February 2025 and followed a semi-structured protocol based on the Resource Circularity, Resource Efficiency, and Resource Substitution framework adopted by SWITCH-Asia.

Participants represented the following entities.

Government institutions: Ministry of Economic Development and Trade, Ministry of Agriculture, Committee for Tourism Development, Committee for Environmental Protection, and the Agency for Innovation and Digital Technologies

Associations and business networks: National Association of Small and Medium Businesses (NASMB), Tajik Community-Based Tourism Association (TCBTA), Tajik Association of Tour Operators (TATO), Association of Hotels and Restaurants

Civil society and NGOs: Tourism Development Centre (TDC), Bargi Sabz, Little Earth

Private sector: Rumi Hotel, Greenhouse Hostel, LLC Tavr

International organisations: FAO, Swiss Cooperation Office, EBRD, CIPE Central Asia

Academic institutions: Russian–Tajik Slavonic University

The interviews generated over 200 qualitative observations, coded by thematic clusters related to resource management, food sourcing, waste handling, policy frameworks, and local entrepreneurship. Triangulation was achieved through cross-analysis with official tourism statistics and secondary literature.

3. Overview of current practices and challenges

3.1 Substitution: Transition to renewable and low-impact resources

Most respondents recognised the growing importance of reducing dependence on imported and resource-intensive inputs.

Energy use: A small but increasing number of hotels and guesthouses in Dushanbe, Panjakent, and Khorog use solar water heaters and energy-saving lighting. However, the lack of fiscal incentives and technical expertise limits broader adoption.

Materials: Some eco-lodges source locally produced construction materials (timber, stone, clay) and biodegradable cleaning products. Import dependence remains high for packaged consumables and single-use plastics.

Food sourcing: There is a noticeable shift toward purchasing local produce such as vegetables, dairy, dried fruits especially among community-based tourism (CBT) operators. Yet, inconsistent supply chains, limited cold storage, and the absence of certification for organic produce constrain scaling.

Barriers: high upfront costs of renewable technologies, limited awareness of life-cycle benefits, and fragmented coordination between tourism and agricultural policies.

3.2 Efficiency: Optimising resource use and operations

Interviewees identified inefficient resource management as a critical challenge across hospitality operations.

Energy and water: Only a minority of facilities monitor energy or water consumption. Energy audits are rare, though hotels participating in donor projects (e.g. EBRD Green Economy Facility) report savings of 15–20%.

Food and waste: Large quantities of edible food are discarded due to poor inventory planning and limited portion control. Few establishments practise composting; waste collection services are often irregular outside major cities.

Operational processes: SMEs report low staff skills in energy-saving and waste-sorting practices. Capacity-building initiatives (e.g. training for eco-guides under FAO's rural tourism projects) show measurable improvement when delivered with local associations.

Efficiency enablers: digitalisation (for stock and booking management), staff training, and improved data collection are recognised as immediate opportunities.

3.3 Circularity: Keeping materials and value in use

Circular practices are still at an early stage but emerging across pilot initiatives:

Reuse and recycling: A few hospitality enterprises cooperate with municipal recyclers for segregated collection of glass and plastic bottles. Composting of organic waste remains mostly informal but promising in mountain guesthouses linked to small farms.

Local value chains: CBT operators integrate tourism with small-scale farming, e.g. reusing food residues for animal feed and fertiliser. Such models demonstrate practical circularity through local nutrient loops.

Innovation potential: Participants identified opportunities in biogas generation, refillable packaging for amenities, and textile recycling in hotel linens. These require technical assistance and clearer regulatory support.

Respondents also stressed that 'circularity' must extend beyond waste management to other aspects of the supply chain, e.g. encouraging local procurement, increasing product longevity, and community benefit sharing.

4. Emerging opportunities and institutional readiness

Stakeholders widely agreed that the policy environment for sustainable tourism is improving, citing the Green Economy Strategy 2023–2037 and National Tourism Development Strategy 2030. However, implementation capacity remains limited. Key opportunities include:

Regulatory: Development of a legal framework for *green and zero-waste certification* under the Committee for Tourism Development.

Financial: Expansion of micro-credit and ESG-linked finance for SMEs through the new EBRD and Swiss Cooperation facilities.

Institutional: Strong engagement of NASMB and TCBTA in promoting agrotourism and local supplier networks.

Educational: Willingness of universities to integrate sustainability and digitalisation modules into tourism curricula.

Across all groups, there is growing recognition that circularity can create competitive advantage - enhancing Tajikistan's brand as a clean, authentic, and locally rooted destination.

5. Synthesis: Circular economy (CE) principles and field evidence

Table 1 shows the synthesis of key points shared by interviewees during the Scenario Development Workshop, February 2025.

Table 2. Synthesis of the key points shared by interviewees during the Scenario Development Workshop, February 2025.

CE Principle	Observed practices	Obstacles for broader uptake	Policy enablers
Resource switch (Substitution)	Solar water heating in hotels; use of local food & materials	Lack of incentives, weak supplier networks	Introduce fiscal incentives, promote green and local procurement; discourage undesirable materials
Efficiency	Energy-saving devices; staff training; inventory management pilots	Limited measurement systems; low awareness	Develop eco-audit standards; integrate efficiency in certification
Circularity	Composting and recycling in CBTs; food-waste reuse	Fragmented logistics; lack of municipal recycling	Establish zero-waste guidelines; support rural composting schemes
Cross-cutting	Partnerships between tourism & agriculture actors	Weak coordination among ministries	Create inter-ministerial CE task force on tourism–food systems; certification

6. Reflections for scenario design

The interview findings confirm that Tajikistan's tourism sector has entered an early but promising phase of circular transition. The stakeholders have demonstrated conceptual understanding and willingness to engage, but they require systemic enablers: policy coherence, financing mechanisms, and technical assistance.

- Circular economy (CE) principles are already visible in Tajikistan's emerging tourism-food nexus through local sourcing, waste reuse/recycling, and renewable energy adoption.
- Institutional readiness exists, though capacity gaps and financing barriers persist.
- The findings provide a baseline for monitoring CE integration in tourism policy and for guiding the establishment of national zero-waste certification schemes.

Three analytical reflections emerge.

- ***Circular economy as integrator.*** CE provides a bridge between tourism, agriculture, and energy policy, offering a coherent framework for cross-sector collaboration.
- ***SME focus is critical.*** Small tourism enterprises drive innovation but face financing and certification barriers that must be addressed through targeted green finance and capacity-building.
- ***Regional cooperation matters.*** Peer learning with neighbouring Central Asian countries (Uzbekistan, Kazakhstan) can accelerate the adoption of CE standards and eco-labelling.

The evidence gathered during the interviews directly informed the Scenario Development Workshop (February 2025) and underpins the policy recommendations in Section 4 of this report.

Global Gateway

switchasia

**Funded by
the European Union**

www.switch-asia.eu

EU SWITCH-Asia Programme
@EUSWITCHAsia

SWITCH-Asia
@SWITCHAsia

SWITCH-Asia Official
@switch-asia-official