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Tourism Development in Kazakhstan – Issues and Ways Forward

Potencjał rozwoju turystyki w Kazachstanie – stan obecny i perspektywy

Abstrakt: Niniejszy artykuł stanowi głos w dyskusji dotyczącej potencjału i perspektyw rozwoju turystyki w Kazachstanie. Oparty jest na literaturze przedmiotu i wybranych dokumentach strategicznych. Celem jest zaproponowanie drogi rozwoju turystyki w Kazachstanie. Zaprezentowano tu dwa modele: 1) proponujący wybrane rodzaje podejść do rozwoju turystyki, na których kraj może się skoncentrować w strategiach wykonawczych; 2) dotyczący szczegółowych ram funkcjonowania sektora turystycznego. Mimo że modele te z pewnością nie powinny być uważane za ostateczne, to mają one na celu zapewnienie spójnego przewodniego wkładu w przyszły rozwój turystyki w Kazachstanie.

Słowa kluczowe: Kazachstan; turystyka; liczba turystów; korzyści społeczności lokalnych; rozwój zrównoważony; myślenie strategiczne

Abstract: This article intends to contribute to the growing debate related to tourism in Kazakhstan and to understand future perspectives on tourism development in this country. The aim of the article, which is a desktop research based on previous literature and documents, is to propose a way forward for tourism development in Kazakhstan. Two models will be presented in the article, the first one – proposing the types of tourism development approaches, which the country can focus on, and the second model – illustrating more in details the tourism development working

framework. Although these models should certainly not be considered final, they aim at providing a consistent guiding input on future tourism development in Kazakhstan.

Keywords: Kazakhstan; tourism; number of visitors; local communities benefits; sustainable development; strategic thinking

INTRODUCTION

In the period before the COVID pandemic, tourism was one of the most dynamically developing sectors of the global economy. In 2019, tourism services contributed to the production of as much as 10.4% of the global GDP (decreasing to 5.5% in 2020), and as much as 11% of people in the world were employed in the tourism sector (WTTC 2019). Tourism was also to be a path of sustainable development (WTTC 2019). The year 2017 was, after all, declared by the United Nations, the International Year of Sustainable Tourism for Development. The prospect of an end to the pandemic causes governments of many countries to (re)focus on tourism development and excogitate new tourism strategies to prepare for the reopening of the national and international tourism markets. The Republic of Kazakhstan, like many countries, is waiting eagerly to welcome tourists again.

The priorities for the development of tourism in Kazakhstan were developed just before the pandemic by the Ministry of Culture and Sport of the Republic of Kazakhstan (MCSRK) in the *State Program of Development of Tourist Industry of the Republic of Kazakhstan for 2019–2025* (MCSRK 2019). The strategy includes a proposal for the development of selected & priority tourist destinations/products which are supposed to have the greatest potential. The potential for the development of tourism in Kazakhstan seems to be large. The country is located on the route of the famous Silk Road, and it has five properties inscribed on the World Heritage List (UNESCO/World Heritage Convention, n.d.). In addition it is proposed that there are more than 100 known tourist objects, so-called “tourist magnets” and “points of tourist growth” now (Myrzadiyar 2021), and that Kazakhstan is an excellent proposition for travellers who love nature (Teberghein 2019). Still, despite being the ninth largest country in the world, Kazakhstan remains, for many people, an unknown and enigmatic destination.

Compared to other sectors of the economy, tourism in Kazakhstan occupies a very negligible place. The contribution of the travel and tourism sector in 2019 was only 5.2% of total GDP and dropped to 2.4% in 2020 (WTTC 2021). The economic impact on the workforce market is very low, with a 5.1% stake of the total amount (443,000 jobs) in 2019 and 3.9% in 2020 due to COVID-19 restrictions (WTTC 2021). To compare, globally within 2014–2019, the number

of jobs in this sector comprised 334 million or 10% of total employment, as well as it had a 25% share in providing the new jobs (WTTC 2021).

Tourist spending also remained low. According to WTTC (2021), the visitor's international guests' impact reached 4.4% of total exports in 2019 or KZT 1,165 bn. Local visitors spent KZT 1,349 bn in the same year, 12% more than international tourists: 54% vs 46% of total spending. Unfortunately, there was an 80% and 42% decrease in 2020 in international and domestic visits (WTTC 2021).

It is hoped that, as in many other countries around the world, also the Kazakh tourism industry will recover over the coming years, driven by a rebound in tourism as travel restrictions are lifted. The above mentioned *The Programme for the Development of the Tourism Industry for 2019–2025* (MCSRK 2019) approved in May 2019 by the Kazakh government hopes to make Kazakhstan's tourism sector more competitive, facilitating growth in the hotels and motels. The government aims to increase the number of overseas tourists from 830,000 to 3 million, increase the number of domestic tourists from 5 million to 8 million, and increase the contribution of tourism to the country's GDP from 5.7% to 8% (MCSRK 2019).

Kazakhstan is an emergent tourism destination and literature related to tourism in Kazakhstan is growing from only one article in 2010 to 47 articles in 2020 (about literature production on tourism in Kazakhstan, see Wendt 2020). This article intends to contribute to the growing debate related to tourism in Kazakhstan and to understand future perspectives on tourism development in this country. Thus, the aim of the article, which is a desktop research based on previous literature and documents, is to propose a way forward for tourism development in Kazakhstan. Two models will be presented in the article, one proposing the types of tourism development approaches which the country can focus on, and the second, illustrating more in details the tourism development working framework. While the models should surely not be considered final and are certainly open to debate, they intend to give a consistent guiding input on future tourism development in Kazakhstan. Future research is welcome to further enhance the models and to excogitate always new solutions to the article topic, tourism development in Kazakhstan.

LITERATURE REVIEW

Tourism can have positive and negative points. On the one hand, tourism firms create jobs for “socially vulnerable categories of the population, contribute to the development of self-employment”, while on the other, competition between “tourism firms and big business, leads to the ruin of part of small enterprises

and the loss of jobs” (Aktymbayeva et al. 2020a, p. 1242). Therefore, it is important to create proper “conditions for the functioning of the tourism system under which employment growth would be stable” (p. 1242). Tourism can also contribute to various aspects of development – specific tourism development can have its spin-off, thus

apart from infrastructures, the arrival of tourists enhances the efficiency of human resources at the destination, as tourists require certain services in order to feel better during their stay at the selected tourist destination. In particular, there is an increase in the demand for infrastructure services in terms of water supply, waste disposal, communication and electricity supply, as the necessary elements for comfortable functioning of tourists at the selected destination. (Biolo 2017, p. 25)

In Kazakhstan, tourism can be an important way to diversify the economy (see Shevyakova, Munsh, Arystan 2019). Recognising the possible value of tourism, the Kazakh government in 2019 approved *The Programme for the Development of the Tourism Industry for 2019–2025* aimed to ameliorate the tourism sector, including its human resources, and concurrently local population’s quality of life (Aktymbayeva et al. 2020b, p. 74). The programme aims to improve the tourism sector investment climate and to increase the flow of international and local tourist and promoting Kazakhstan locally and internationally (p. 74).

However, “Kazakhstan is an emerging tourist destination with limited tourism infrastructure, weak product and services offers, and does not have a high image in global tourism markets” (p. 74). Kazakhstan is not yet prepared – it still has various weaknesses and gaps – to reap potential of a vibrant and valuable tourism sector. Numerous issues need to be resolved or improved. For example, the Kazakh “government recognises that the quality of tourist infrastructure, openness of bilateral service agreements, complexity of the visa regime, and low quality of roads are areas for further improvement” (p. 74). Specific weakness for Kazakhstan’s tourism has been recognised in the absence of information on Kazakhstan tourism in the international market, under-qualified personnel in the tourism sector (including some inconsistency between educational and labour contexts), and weak transport infrastructure (p. 74). Actions need to be taken to improve the tourism sector in the country. For example, advertising of Kazakhstan at international and local levels “must become a priority for authorities in the sphere of tourism” (Biolo 2017, p. 13). In this context “an innovative image strategy must be initiated for Kazakhstan and product development, special marketing, pricing and security regulations must be made” (Abubakirova et al. 2016, p. 6).

Infrastructures such as transport and communication are “crucial for the implementation of various forms of tourism” (see Dmitriyev et al. 2021, p. 291). A study on transport accessibility in the north Kazakhstan region as a factor of tourism development proposed that the road network is weak, thus, “[it] does not ensure sufficient transport accessibility to areas with a high degree of lakes, which is a barrier to the development of tourism both domestic and the arrival of tourists from the Russian Federation” (Dmitriyev et al. 2021, p. 294). Information technology is also important and each tourism segment can also have its own specific requirement about it (Shevyakova, Munsh, Arystan 2019, p. 147), therefore, information and communication technologies (ICTs) can “provide new opportunities for tourism companies in Kazakhstan” (Kim, Garkavenko 2019, p. 122).

The growth of the tourism segment is very challenging because many providers are geographically very remote, there is a lack of skilled personnel and relevant statistics (Aktymbayeva et al. 2020b, p. 74). A 2020 study indicates that the government is busy preparing a framework for the operation of the hospitality sector and that in 2019 “a specialised educational institution – the International University of Tourism and Hospitality was funded as a model for training tourism personnel so to reach international standard” (p. 74).

The issue of human resources is certainly fundamental because the “development of tourism in a country depends firstly on the development of an educated and qualified workforce” (Abubakirova et al. 2016, p. 6). The same issue is recognised for Kazakhstan. To have high quality tourism and be competitive internationally, Kazakhstan needs “to solve the problem of personnel in the country” (Aktymbayeva et al. 2020b, p. 74). A study on human resource management system in tourism of the Republic of Kazakhstan revealed the “need for training professionals with HR skills for the tourism industry who are actively involved in the system of innovative tourism development” (Pestova et al. 2021, p. 1009). Proper human resources are necessary to advance tourism, thus, “the issue of training professional tourist personnel with the skills of managing the human resources system in the conditions of modern society is relevant for the entire world tourism community” (p. 1006). The higher, vocational and technical education sectors will have opportunities in the training of tourism personnel (Aktymbayeva et al. 2020b, p. 75). Government will have to be a protagonist and properly recognise the roles and value of tourism; “the tourism sector of Kazakhstan needs the strategic focus of the government” (Allayarov, Embergenov, Han 2018, p. 122). However, it is noticed that “one of the main reasons for Kazakhstan’s underdeveloped tourism sector is the lack of adoption of tourism as an economic activity by local administrations” (Abubakirova et al. 2016, p. 6).

When considering the country's rich tourism potential, Kazakhstan can diversify its tourism offer, promoting "the diversification of different types of tourism, from the cultural to the ethnographic; from event to medical; from ecological to sport; from sacral to trophy hunting" (Biolo 2017, p. 7). A study about Qatar indicates that tourism diversification can be considered in two ways: "first diversification of the economic sector as a whole; secondly, diversification within the tourism sector" (Giampiccoli, Mtapuri 2015, p. 3). Innovation is also fundamental in tourism, and the role of government, sustainable tourism approach, innovation, human resources and ICT are also interlinked. It is important "that serious and immediate efforts should be taken by the government to sustainably develop Kazakhstan" (Allayarov, Embergenov, Han 2018, p. 123). For example, the advancement "of tourism studies must include innovation strategies and the way through which the tourism industry can be innovated" (p. 122) and "the use of ICTs for sustainable tourism development depends significantly up on the existence of an ICT policy which signifies the official adoption of such technologies" (Kim, Garkavenko 2019, p. 123). At the same time, the introduction of "ICTs alone will not meet the development challenge. For ICTs to succeed in Kazakhstan, education for all must be the first priority" (p. 124). However, weaknesses are present – despite the "proper application of ICTs promoting the Kazakhstan marketing, information, EMS system, host community development, etc., it has been observed that it has a very slow progress at study area but awareness is strongly creeping up" (p. 130).

Another important area of concern is related to investment. Tourism investment in Kazakhstan is low, inhibiting "the industry's development and restricting potential growth" and many project struggle to take-off due to the lack of supportive framework (Aktymbayeva et al. 2020b, p. 74). Various strategies to favour investment are on the way (p. 74).

However, not everything is negative and opportunities and potential of tourism sector in Kazakhstan are present. For example, a Kazakhstan-based study assessing tourism destination competitiveness shows three negative and three positive issues. Kazakhstan is competitive in terms of availability of historical sites, natural resources and safety, whereas the country is weak as far as language knowledge, professionalism of tourism personnel, and pricing policies are concerned (Tleuberdinova, Salauatova, Pratt 2022, p. 12).

It should also be recognised that the competition amongst "destinations is usually focused not on certain aspects of the tourist product (transport, environmental resources, hospitality, tourist services, etc.), but on tourist destinations as an integrated set of tourist experiences and objects" (Kenzhebekov et al. 2021, p. 4). Therefore, in order to fully exploit the tourism potential it is crucial to

recognise positive tourism attractions, the product available to the country and possible strategies that can enhance the tourism development and tourist experience. The characteristics of Kazakhstan make tourism a priority sector to develop for five main reasons which in general are: providing employment, creating business opportunities, contributing to infrastructure development, enhancing cooperation between the tourism sector and other economic sectors, and, lastly, favouring cross-cultural relations (see Shevyakova, Munsh, Arystan 2019, p. 143).

Entrepreneurship and community involvement are certainly two fundamental issues in tourism development. Community involvement in tourism is a fundamental approach to foster sustainable tourism development and local population's well-being. For example, in relation to world heritage sites (WHS), the involvement of local population in tourism planning and conservation of the WHS "will help improve the quality of life of local residents and make the heritage protection plan more sustainable" (Akbar et al. 2020, p. 36). The involvement of local people "in tourism activities at the WHS is essential for the sustainable tourism development" and community involvement can also contribute to a more equitable and efficient distribution of benefits and costs (p. 36). Nevertheless, in Kazakhstan society, participation in WHS is weak.

A study devoted to the Aksu-Jabagly State Nature Reserve in Kazakhstan revealed that while difference between specific people living in two different settlements was present, "both settlements had a weak involvement in tourism at the heritage site" (Akbar et al. 2020, p. 44) and the "overall participation status was very low" (p. 46). The results of the study revealed the lack of preferential policies for local residents' participation in tourism; fewer visits to the tourism destination; and lack of necessary funds, labour force and knowledge of tourism planning (p. 46). Another similar study showed that "the two main neighbouring communities of the Aksu-Zhabagly tourist destination are dissatisfied with two dimensions (economic and political) of sustainable tourism development to some degree, which are the main driving forces for the development of local areas. Currently, few people see the economic benefits of the tourism industry, especially in the village of Abaiyl, which is relatively far from the reserve" (p. 80). There is certainly room for improvement, the local population needs to be involved and possibly the tourism approach should be channelled toward leaning to community-based tourism principles and characteristics so that the local population, especially the disadvantaged section of society, can consistently increase its participation in, and benefit from, the tourism sector.

Tourism is a field with many opportunities for entrepreneurial development (Tleuberdinova et al. 2021, p. 180) and proper involvement of local people should therefore be a priority. In "emerging economies like Kazakhstan, tourism

development needs active entrepreneurship” and tourism entrepreneurs are fundamental for the growth and attractiveness of tourism destinations (p. 179).

Kazakhstan with its “strong backing of history and culture” (Allayarov, Embergenov, Han 2018, p. 118) does not lack attractions which certainly can be “exploited” for the development of the tourism sector. For example, there are five UNESCO cultural and natural heritage sites in the Kazakhstan area: the Mausoleum of Khawaja Ahmed Yasawi, Petroglyphs within the Archaeological Landscape of Tamgaly, Saryarka – Steppe and Lakes of Northern Kazakhstan, the Silk Roads: the Routes Network of Chang’an-Tianshan Corridor, Western Tien-Shan (Brugier 2014; UNESCO/World Heritage Convention, n.d.). It is important to underline that two of these sites (the Silk Roads: the Routes Network of Chang’an-Tianshan Corridor and Western Tien-Shan) are transborder sites.

Cultural tourism can have a prominent position in the country’s tourism development strategy as cultural identity is at the heart of tourism development in Kazakhstan, as expressed: “Within the modernization of national identity, the President paid special attention to the issues of preserving Kazakhstan’s cultural identity and its own national code, which should make the country recognizable on the global tourism market” (Biolo 2017, p. 7). For example, the country’s intention to develop “Kazakhstan’s Sacred Belt” consisting of a large amount of monuments some of which are listed in the UNESCO World Cultural Heritage List (p. 7). A study on the northern regions of Kazakhstan also proposes many possible attractions in that area categorised under five types, namely “natural, natural-technical, architectural, historical-revolutionary, archaeological” (Dmitriyev, Fomin, Wendt 2021, p. 1072). Thus, the same study ends with a specific ecotourism proposal with great potential of the northern regions (p. 1072). It is clear that Kazakhstan’s rich history and culture together with its vast land and natural resources offer a great potential for the tourism development:

The Republic of Kazakhstan with its extensive territory, favorable in respect of trade relations between Europe and Asia by the geographical location, rich with the cultural and historical heritage and traditions which have remained till these days, has all reasons for the successful development of tourism. (Shevyakova, Munsh, Arystan 2019, p. 143)

The Silk Road is certainly the perfect representation of a possible powerful brand of cultural tourism value (see Biolo 2017, p. 16). Concurrently, to focus on cultural tourism, it is also proposed that in Kazakhstan, tourism development “should be developed on the principles of a model of sustainable development of the region [and] be treated as an integral part of the country’s economy, which depends on the sustainable development of all other sectors” (Aimagambetov et

al. 2017, p. 195). A sustainable and community-based approach of tourism based on nature and cultural attractions should be the basis for Kazakhstan's tourism development strategy. It is not surprised that a study indicates that

the majority of stakeholders emphasised not only the importance of ecological (fauna and flora) but also cultural (traditional games, craft-making and cooking traditions) aspects in the design of the visitors' experiences [and] more than half of the tourism providers indicated that eco-cultural tourism, among other models of tourism development such as ethnic tourism and community-based tourism, was the most appropriate model for tourism development in the rural areas. (Tiberghien 2019, p. 502)

Thus, research on the Kyzylarai tour in Central Kazakhstan proposes that the eco-cultural tourism development model "offered in the Kyzylarai tour encompasses all the elements necessary to satisfy visitors' demand for authentic tourism experiences based on genuine reciprocal relationships with their hosts" (p. 510).

Beyond the cultural context it is important to focus on other types of tourism that can contribute to Kazakhstan's tourism development and development in general. The Business/MICE tourism and the health/well-being tourism are a case in point. Numerous "exhibitions which take place around the globe are the images of political and cultural backgrounds of any country" (Allayarov, Embergenov, Han 2018, p. 119), thus, they not only help in tourism development but reflect and spread the country's image internationally. It is therefore important for the country to start organising – as it did, for example, at the Expo 2017 – various exhibitions "which will result in the development of the tourism industry of Kazakhstan" (p. 119). In Kazakhstan, the potential of business/MICE tourism is recognised. However, there is a need for adequate infrastructures and services, and individual national companies should understand the value and role of business/MICE tourism. It should also be noted that the Russian market seems the most probable foreign destination market for this type of tourism (Trusheva, Syzdykbaeva 2018, p. 734) (however, the current – April 2022 – conflict situation could probably change this market relevance).

The emergence of "wellbeing tourism (particularly nature-based wellbeing-focused forms of tourism and recreation) can be enriched by the recognition of the benefits that human health and wellbeing derive from ES/CES [ecosystem service/cultural ecosystem services], and that also this »reframing« of such linkages can equally inform policy-making" (Dłużewska, Tuohino, Correia 2020, p. 289). An example from Poland shows that wellbeing centres, health SPA and other stations and services for improving health and wellbeing "are located in prime natural landscapes and settings. It is not hard to conceive that these cultural

and historical contexts could provide good opportunities to explore more holistic and nature-based »wellbeing tourism« development initiatives, beyond the narrower more traditional focus on health or curative tourism, as currently happens” (p. 299). The Polish examples can well lead to the recognition of the possible value of wellbeing/health tourism in Kazakhstan. The country’s potential of health tourism development in the northern part is recognised (see Makhanova et al. 2022). In that part of the country, the landscape elements “that have balneological significance in human life and are formed in special landscape-forming factors, contain a huge potential for medical and health tourism development” (p. 253).

PROPOSAL FOR FURTHER DEVELOPMENT OF TOURISM IN KAZAKHSTAN

It seems apparent that the tourism development strategy of Kazakhstan should be based on the two main criteria of sustainability and culture. At the same time, the community involvement – thus, community-based tourism (CBT) – and a diversified approach to different types of tourism should be present. Based on these issues, Fig. 1 illustrates the various types of tourism that the country development strategy should focus on. Figure 1 proposes five main general tourism development directions for Kazakhstan, all of them should adhere and be in line with a sustainable approach. The five main directions of tourism development are: alternative tourism, food tourism, conventional tourism, health-well-being tourism and business/MICE tourism. Taking into account these five directions, it is necessary to look at more specific types of tourism that should be considered by Kazakhstan. The three main general approaches, i.e. alternative tourism, food tourism and conventional/mass tourism, should be within a cultural tourism context where local culture and, at the same time, national identity should be considered. Alternative tourism should focus on the three main types of tourism – ecotourism, adventure tourism and CBT. These three types of tourism perfectly match the need for the sustainable use (as a tourist attraction) of Kazakhstan’s natural resources and, at the same time – through CBT – increasing the involvement of local community, which will certainly translate into the development of tourism. Community-based tourism is particularly geared towards engaging the poorer strata of the population in this sector, therefore, allowing them to control the tourism sector in their location and gain from it. Ecotourism and adventure tourism are well positioned to take advantage of the vast natural and wild landscape of Kazakhstan, thus, allowing to offer various products. The proposal of ecotourism, adventure tourism, and CBT does not mean that high spenders cannot participate in this type of tourism if specific forms of such tourism, namely

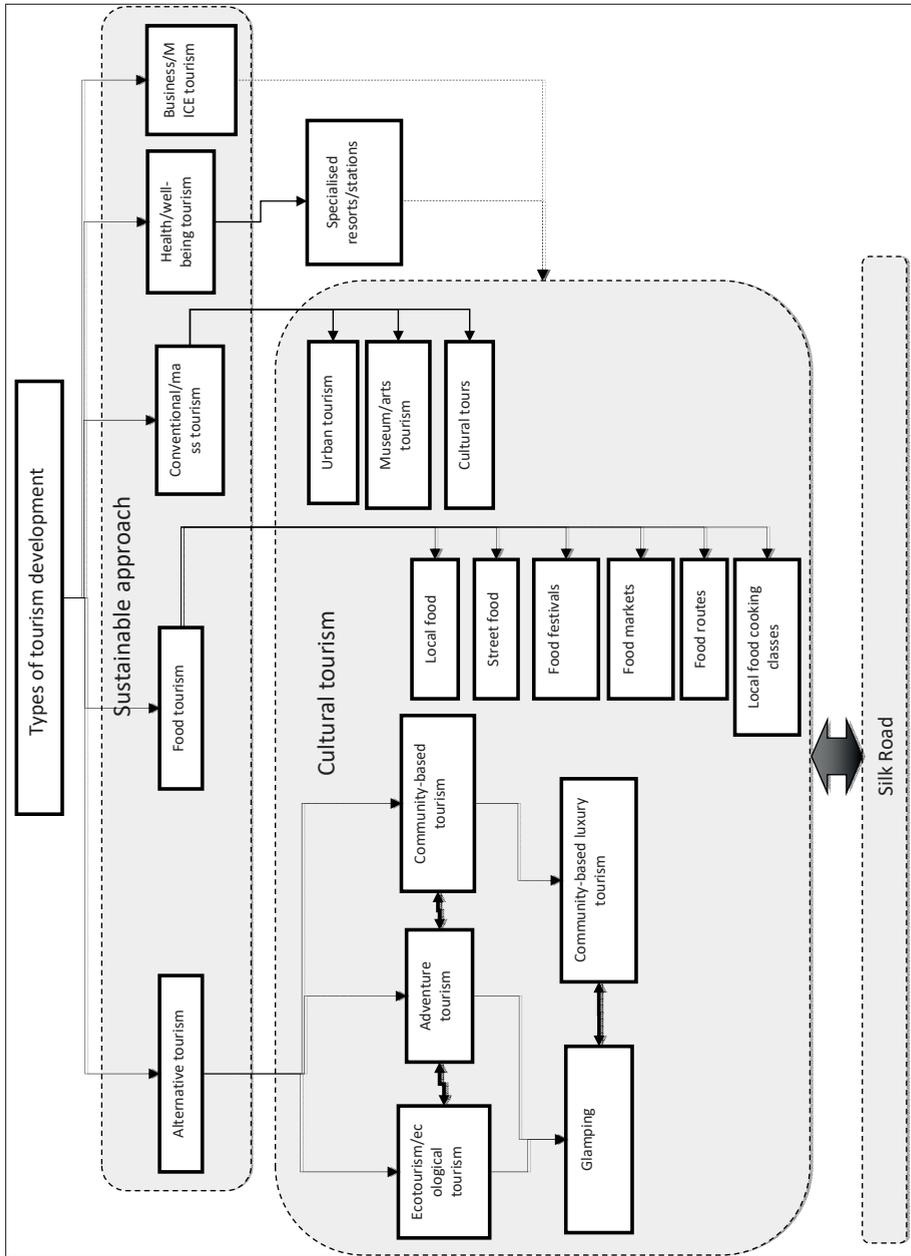


Fig. 1. Proposed tourism development strategy in Kazakhstan (authors' own study)

“glamping” and community-based luxury tourism (for community-based luxury tourism, see Mtapuri, Giampiccoli 2017), are also developed in the country.

At the same time, it will be risky to focus only on alternative tourism, hence additional types of tourism markets are necessary. In a cultural context, food tourism markets are certainly important.

As is common knowledge, each country has its own traditional food, ingredients and cuisine that can be an important tourism resource attracting tourists with various attractions such as restaurants, street food, food festivals, etc. Conventional/mass tourism, which should also remain largely within a sustainable approach, should also concentrate its attention on culture, and therefore, tourism products and services should be linked to the local culture such as monuments, museums, World Heritage Sites, specific cultural tours, and so on.

Beyond culture the country should take advantage of its natural resources and landscape in order to focus its attention on developing health/well-being tourism through the development of specialised resorts and stations. While this type of tourism is not related to culture, the guest of the resort/station could certainly be invited to visit or participate in local culture tours and attractions during their stay at the resort. Last but not least, the country should evaluate the possibility to advance business/MICE tourism. The business/MICE tourism sector is very lucrative and it is important not to forget to take advantage of this sector by attracting both the international and domestic market. Similarly, to health/well-being tourism, the business/MICE tourism sector is not related to culture, however, also in this case, the business/MICE tourists could certainly be invited to visit or participate in local culture tours and attractions. Beyond the specific types of tourism proposed for Kazakhstan, it is important to propose a general model/framework within which tourism development should occur (Fig. 2).

Figure 2 proposes that tourism development should work within the general framework based on four foundations: innovation, cooperation, sustainability and diversification. It is important that the development of tourism is part of the country's broader diversification strategy and is innovative and sustainable in that direction, where different stakeholders, starting from the fundamental role of the government, work cooperatively. Within the context of these four foundations, tourism development has various components, namely: attractions/activities, policies/regulations, businesses/services, promotion/marketing, and human resources, infrastructure. All these components do not work in isolation but, as Fig. 2 illustrates, they are all connected. It is obvious that each of these components will have its own practical elements. For example, the business/services component includes restaurants, tourism operators and so on (the rectangle element with dots connected with each item just indicated other possible elements).

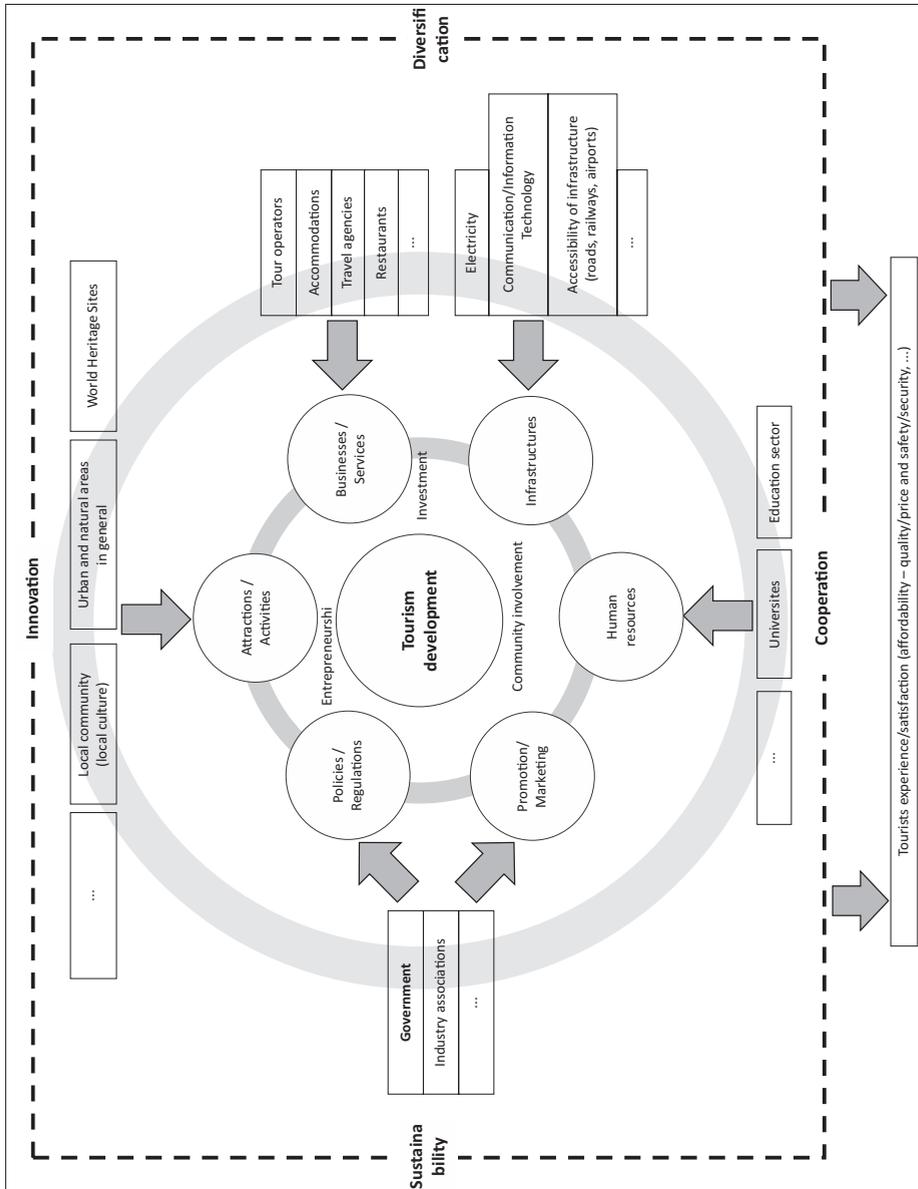


Fig. 2. Proposed elements and context of tourism development (authors' own study)

Again, all the various elements (the practical elements such as restaurants) of different components are connected to each other and should work cooperatively in a coordinate manner. Finally, within the general four foundations, the various tourism development components (and their practical elements) should work in order to facilitate and promote entrepreneurship, investment and community involvement. These three directions of tourism development are fundamental for increasing community participation in the tourism sector, favouring the investment in the tourism sector and enhancing the entrepreneurship spirit and capacity in tourism.

In the proposed model (Fig. 2), everything is always connected to each other. Taking the example of investment, this should be innovative. For example, a possibility should be looking at new investment approaches, such as the Investment Redistributive Incentive Model (IRIM), which “leverages investment incentives such as tax cuts or relief as a redistributive measure effected through the reconfiguration of the management and ownership structure of a company” (Giampiccoli, Mtapuri 2020a, p. 7) or the possible evolution of IRIM including the establishment of special tourism zones (STZs), i.e. specific geographical areas where the tourism sector should be based on the CBT approach (Giampiccoli, Mtapuri 2020b) or eventually on other specific agreed approach or regulations. Other examples of investment cover the implementation of “new” specific forms of tourism such as community-based diffused tourism (Giampiccoli, Mtapuri 2020c), or establishing specific categories in a specific tourism subsector such as accommodation (see, e.g. Giampiccoli, Muhsin, Mtapuri 2020). Figure 2 shows that the final aim should be to enhance the tourist experience/satisfaction including such issues as affordability, quality/price and safety/security. This is to strengthen the image of the visited places and, therefore, of Kazakhstan.

Figures 1 and 2 represent the various tourism approaches, components and elements of a general tourism development model for Kazakhstan. However, to put this into practice, it will require more research. It is important that while the government maintains a leading and central role in the process of tourism development, all stakeholders are involved and the different approaches, components and issues are coordinated.

CONCLUSIONS

The tourism sector in Kazakhstan is not delivering its proposed potential. It is necessary to implement new strategies and initiatives in order to improve the tourism sector in the country. Within this context, this article aimed to contribute to the literature related to tourism development in Kazakhstan by proposing some proposals. The article literature has provided the strengths, weaknesses and

potential types of attractions and tourism segments that can, in various ways, influence tourism development in Kazakhstan. Thereafter, two models were proposed. The first model shows the various types of tourism types/segments that the country should focus on. Based on the literature, the article proposed a sustainable tourism approach and focused on a cultural tourism sector. Specific types of tourism are envisaged as important, such as community-based tourism, adventure tourism and, in a different context, also MICE tourism. This model gives the general direction on what types of tourism Kazakhstan government should focus its attention.

The article proposed two models showing the elements and context of tourism development that should be considered when developing tourism in Kazakhstan. It is important that the government, as the main entity, remains the leader (highlighted in bold in the model) in guiding and managing tourism development in the country. However, the government must be ready to collaborate with other stakeholders. Many elements must be taken into consideration such as – for example – human resources and infrastructure development. The two models are proposed as a kind of “guidelines” on how to go ahead with tourism development in Kazakhstan, they constitute a modest contribution for the Kazakh government on the proposals concerning the tourism development. Although these models are not fully exhaustive and flawless, they are surely worth paying attention to as they aim to participate in the ongoing debate and proposals on the development of tourism in Kazakhstan.

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