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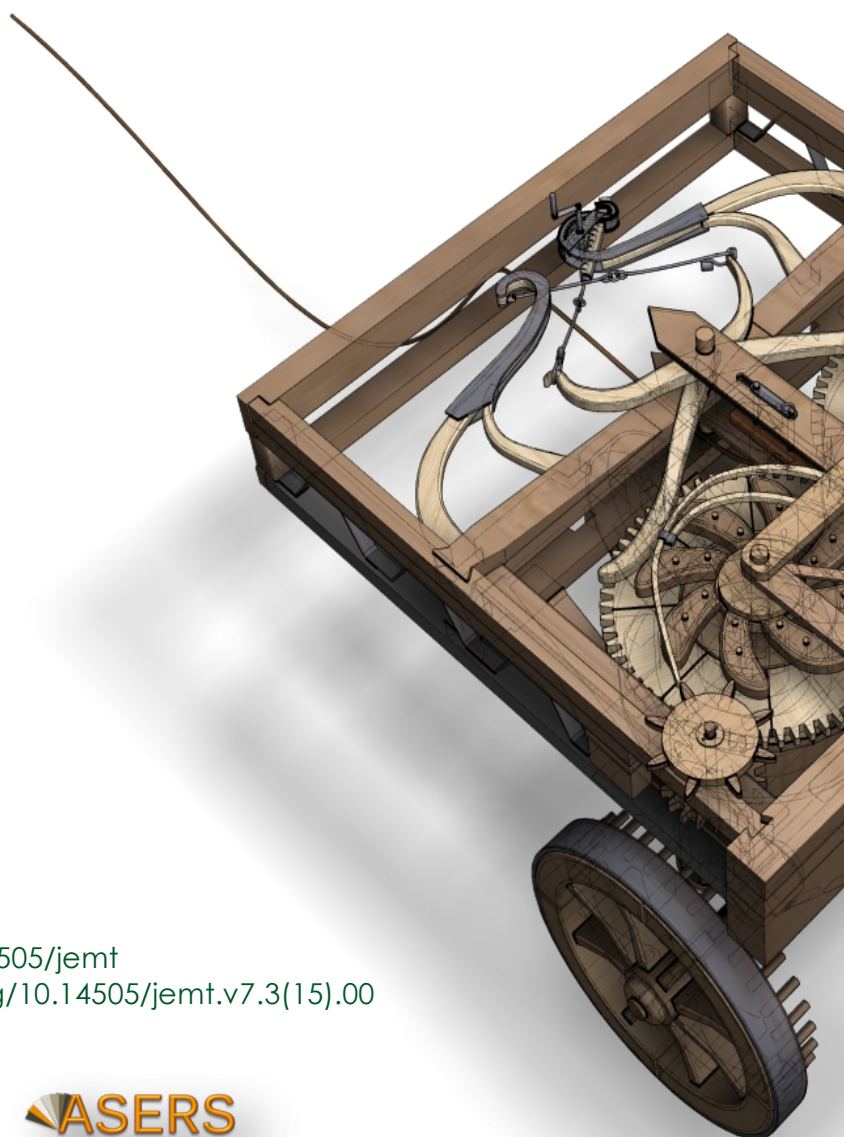
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Journal of Environmental Management and Tourism

Journal of Environmental Management and Tourism is a young interdisciplinary research journal, aimed to publish articles and original research papers that should contribute to the development of both experimental and theoretical nature in the field of Environmental Management and Tourism Sciences.

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Analysis of Tourism Cluster Development: Kazakhstan Experience

Aliya NIYAZBAYEVA

Academy of Public Administration under the President of the Republic of Kazakhstan

Astana, Kazakhstan

aliya_amore@inbox.ru

Anar YESSENGELDINA

Academy of Public Administration under the President of the Republic of Kazakhstan

Astana, Kazakhstan

yanar77@inbox.ru

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Abstract:

At the present moment, formation of clusters in the tourism industry in order to improve the competitiveness of relevant administrative and territorial units has become the most pressing task for Kazakhstan. Formation and development of tourism clusters is the effective mechanism for involvement of foreign direct investments and activation of foreign economic integration. Inclusion of domestic tourism clusters into global value chains will allow raising the level of economic growth essentially by means of raising the international competitiveness of enterprises included into the cluster.

The purpose of this article is to analyze the current state of the clustering process in the tourism industry in Kazakhstan and to define the most important causes preventing more complete and effective use of the cluster approach in tourism, as well as to state the recommendations for solution of the problems identified through the means of the state policy. Particular attention is paid to the experience of the Kazakhstan cluster initiative implementation into the tourism industry with the purpose of finding out the key accomplishments and problems of the pilot clusters.

Keywords: tourism, cluster, Kazakhstan, development, cluster initiatives.

JEL Classification: L83, Z32.

1. Introduction

At present, the formation of the national tourism system based on the theory of cluster development of tourist areas (Morozov and Morozova 2016). Clusters are a striking and common feature in today's economy (Adrian 2002). They have received widespread attention as an instrument for enabling firms to overcome internal limitations by joining efforts and resources with other firms, R&D institutions and universities, and public sector organizations in pursuit of a common objective or vision (Andersson *et al.* 2004) and have become a prevalent component of national and regional economic development plans (Sölvell *et al.* 2003). Clustering allows the market participants to use the synergetic effect and to create lasting business objectives with a focus on increasing sales and profits (Fetisova *et al.* 2015). Given the importance of space and distance in economic development, Kazakhstan, since the early 2000s, has enthusiastically embraced the concept of cluster development (McCombie and Spreafico 2014). Thus, the project named "Diversification of Kazakhstan Economy through Cluster Development in Non-Extraction Sectors of the Economy" was launched in 2004 (Bidelmanova 2012). According to the opinion of the experts involved in the implementation of this project, the tourist cluster was identified as one of seven potential clusters for development of the Kazakhstan economy. In

this regard, the formation of regional territorial clusters in the tourism industry and stimulation of their growth is one of the most important tasks faced by modern Kazakhstan.

2. Cluster theory

Many distinguished scholars were engaged in scientific researches in the field of clusters. For the first time, the cluster approach as one of the most effective systems of economic organization was mentioned in the works of Marshall (1993) and Schumpeter (1982). We can say the cluster approach is based on Marshall's "industrial area" and agglomeration economy. Additionally, Schumpeter's innovations that encourage the growth of intra-regional agglomerations are also its historical basis. Thus, on the one hand, the transaction expenses are reduced in a cluster due to the physical proximity of the associated entities, and on the other hand, the innovations are extended from one organization to another providing a constant increase in productivity in the cluster, as a whole.

American economist Porter (1993, 2005, and 2008) created the theory of competitiveness and clusters based on Marshall's agglomeration approach and Schumpeter's innovative approach. Enright (2000) took a step further by developing the concept of a regional cluster in which member firms of the cluster are in the geographical proximity. He considered that competitive advantages are generated not at the national level, like in Porter's theory, but at the regional level. Indeed, a state cannot be competitive in the absence of competitive regions. Herewith the main role is given to the historical premises of the territory development, special characteristics of business culture, organization of production and education.

The study of the cluster approach in the tourism industry received the application development in the works of Jackson and Murphy (2002) who emphasize the need for use of the cluster approach in the tourism industry due to the new opportunities for development of local markets, strengthening the interaction between business entities of the region and business consolidation. According to Nordin (2003) the benefits from the cooperation of firms providing tourist services allows to use effectively the collective possibilities to create tourist service and foster the enterprises not related directly to this area. Bernini (2009) agrees with this statement, in his opinion, the cluster approach is very suitable for the tourism sector, since it is characterized by a fragmentary structure, usually based on small and medium-sized enterprises, as well as various independent task forces not necessarily involved in the same sectors of the economy.

3. Implementation experience of the Kazakhstan cluster initiative in the tourism industry

In 2004, the Government of the Republic of Kazakhstan initiated the project named "Diversification of Kazakhstan Economy through Cluster Development in Non-Extraction Sectors of the Economy". The Marketing and Analytic Investigation Center of the Ministry of Economy and Budget Planning of the Republic of Kazakhstan developed the project in cooperation with foreign consulting companies J.E. Austin Associates, Inc. and Economic Competitiveness Group, Inc. (Turginbayeva 2008). At the same time, Professor Michael Porter, the Head of the Institute for Strategy and Competitiveness at the Harvard Business School, the founder of the concept of clusters, was a scientific consultant of the project (Bochkova 2015). As a result, tourism was identified among the first of the seven priority non-resource sectors to create a basis for improvement of industrial competitiveness and diversification of the economy.

According to the experts' opinion, the competitive advantage of Kazakhstan is in a unique culture (cultural and educational tourism), rich natural potential (ecotourism), increased business activity (business tourism), as well as the opportunity to be engaged in active leisure activities, such as sports and adventure (extreme) tourism.

Given the importance of creating a tourist cluster, IPK International conducted the market researches of Kazakhstan regions' image and tourist potential in order to determine the further tourist industry development strategies. The results of the studies allowed to formulate the recommendations on the tourist industry development strategy in the country with due consideration of the competitive advantages of Kazakhstan and cluster initiatives for the long term, and to provide implementation of the number of projects, including the creation of the State program of tourism development in the Republic of Kazakhstan for 2007-2011 (Government of the Republic of Kazakhstan 2006). Moreover, the following work was carried out in framework of the implementation of the above-mentioned Plan:

- tourism industry has been included into the list of priority economic activities providing the opportunity to use benefits and preferences under the investments legislation to potential investors;
- the Tourism Expert Council has been approved under the tourism authorized body;

- beginning from 2005, students are trained in tourist specialties in the leading foreign educational institutions within the framework of the international program “Bolashak”;
- the implementation methodology of Tourism Satellite Account in the System of National Accounts was developed under the recommendations of UNWTO in association with the Agency on Statistics of the Republic of Kazakhstan;
- for stimulation of the inflow of foreign and domestic tourists into the national parks and specially protected natural reservations, the uniform tariffs were established at the rate of 0.2 MCI for their visit (Hasenov 2009).

Thus, the domestic tourism industry that entered the period of serious qualitative changes increasingly obtains features of the dynamic, civilized sectors of the economy. Ministry of Tourism and Sports of the RK has determined the gradual establishment and development of tourism clusters and approval of master plans. For comparison, we will give examples of the pilot tourism clusters in Kazakhstan implemented in 2005-2010.

The tourist cluster of Almaty and Almaty region was developed originally, as this region is the most suitable for implementation of cluster initiatives both in infrastructure and in the business men's readiness to cooperate with the government to achieve the common goal, i.e. to achieve the region attractiveness increase for tourists. Thus, the biggest tourist sites have been selected and included into the development of the Almaty tourist cluster program. The Small and Big Almaty Gorge, Road to Gorelnik, Tuyk-Su and Chimbulak, National Park “Altyn-Emel”, the Great Silk Road, Charyn, Kolsai Lakes, Tamgaly Tas Gorge are among them. It has been determined that such types of tourism as ecotourism, cultural and educational, conference and business tourism will encourage the development of the pilot cluster in Almaty region to a greater extent. In particular, Almaty Congress Center (Congress Office) was created for the development of conference and business tourism. A set of measures and proposals is provided for credit resources available for the tourism industry, for the issues of the tax preferences and lending in the development institutions, assistance to tourism organizations on transition to international standards of quality.

The business incubator Sodbi was created in the South Kazakhstan region during the implementation of action plan for the tourism cluster development. Its mission is the support and assistance to small businesses, motivation for new companies' activity, as well as stimulation of the innovation development in the region. The tourist portal Southkazakhstan.com has been launched in trial operation in order to promote domestic tourist products. The tourist sites of the region, such as places of interest, historic sites, monuments, cultural heritage, etc. are made the basis of the portal content. Besides, the akimat of the South-Kazakhstan region adopted the State Program “Development of Turkestan as a spiritual, cultural and tourist center of Kazakhstan for 2007-2015”. The main tasks of this program were:

- formation of the target structure of the city and its periphery economy on the basis of the complex of historical and cultural heritage of the Turkestan Tourist Ring;
- creation of engineering and tourism infrastructure of the city, close to the level of the developed world cultural and tourist centers;
- improvement of the tourist service quality to international standards and, ultimately, increase in foreign exchange inflows into the Republic's economy;
- expansion of the tourism industry on the basis of tourism cluster development and build-up of the partnership relations with countries of the world;
- provision of new jobs and reduction of poverty and unemployment, through the expansion of the tourism industry and the complex of industries providing its needs.

In 2007, the Master plan for tourism development up to 2015 was presented within the plan of creation and development of tourist cluster in the Mangistau region. One of the economic priorities of the region was the creation of a strong, world-class competitive tourist cluster. The unique project of tourist recreation zone “Kenderli” was developed. “Kenderli” is a tourist town with a business center, onshore and offshore facilities and all the necessary substructures. The development area in the master plan was 530 hectares in the first stage and 795 for future expansion. Five-star hotels should be situated directly within the coastal zone; four-star hotels with a capacity of 400-500 beds and a chain of hotels of different categories also have to be offered to the tourists' services. 60,000 workplaces had to be created during implementation of the tourist cluster project. According to preliminary estimates US\$ 2.3 billion was to be invested for the successful implementation of the project in the region, including 0.6 billion of public investments and 1.7 billion of private investments. State benefits and preferences should make US\$ 0.2 billion. At the same time, the estimated

income from sale of land would make US\$ 270 million, and annual income to the budget would make US\$ 110 million.

Therefore, it would be possible to state that the global work on the actual realization of the Kazakhstan cluster initiative in the tourism industry was put into practice in Kazakhstan. But the results are more negative than positive, as the stage of practical realization was not fully reached by any pilot project of tourist clusters development. Thus, the negative results of the clustering process of the tourism industry underlined the following problems:

- lack of effectiveness of the state support tools;
- lack of a complex national program for development of tourism clusters;
- weak interaction between science, business and government in the development and implementation of cluster policy;
- the high price for accommodation and air tickets that considerably increases the cost of tour and respectively reduces its competitiveness by prices on the international market;
- insufficient development of infrastructure, including significant physical and moral deterioration of a large number of places of interest in the tourism industry;
- lack of scientific support for tourism activities;
- lack of qualified staff in the tourism industry, including academic education, some isolation of educational programs from requirements of labor market, requirements of production, employers' expectations.

Thus, the full development of regional tourist clusters as one of the priority directions to increase competitiveness and diversification of Kazakhstan economy was not reached.

4. Analysis of the current state of the clustering process of the tourism industry in the Republic of Kazakhstan

Problems which arose at realization of the cluster policy started in 2005 caused need of revision of approaches and methods of formation and functioning of domestic clusters by the Government of Kazakhstan. So, the "Concept of Formation of Perspective National Clusters of the Republic of Kazakhstan till 2020" was approved on October 11, 2013 (Government of the Republic of Kazakhstan 2013). The Concept was developed in order to create the institutional, methodological and organizational foundations for the development of promising national clusters, their scientific and educational, infrastructural and personnel support. According to this Concept, tourist clusters were determined as one of nine potential clusters in traditional sectors of economy.

The Concept of Development of the Tourism Industry of the Republic of Kazakhstan till 2020 was approved by the Government of the Republic of Kazakhstan in 2014 (Government of the Republic of Kazakhstan 2014). This Concept adoption emphasizes the importance of tourism and serves as a responsible step on the way to use the available potential as well as its further increase. The Concept provides use of the cluster approach to the development of tourism, as it will allow the best use of available resources, concentrating the related production in one particular area, providing increase of the industry competitiveness in general, due to the growth performance of enterprises and organizations belonging to the cluster, the innovations stimulation and the development of new tourist destinations. According to this Concept, the creation of five tourism clusters is possible in Kazakhstan: Astana, Almaty, East Kazakhstan, South Kazakhstan and West Kazakhstan.

Astana cluster is a cluster which includes Astana, Akmola Region, the South-West part of the North Kazakhstan Region, the Western part of Pavlodar and North-East part of Karaganda Region. Astana shall be the cluster center, where the following key places of tourist interest are located: Korgalzhyn State Nature Reserve, Burabay State National Natural Park, Kokshetau State National Natural Park, Buyratau State National Natural Park, Karaganda; Karkaraly State National Natural Park, Bayanaul State National Natural Park. In the future, the cluster can be updated with new places of tourist interest included in the UNESCO preliminary list: barrows with stone ranges of the Tasmola culture, mausoleas of the Begazy-Dandybai culture, as well as places of interest included in the "Silk Road" Serial and Transnational Nomination. Astana with its surroundings and the Borovsk resort area will be the center of the nomadic culture and the steppe diversity. The main tourism products that will be developed in this cluster are the MICE-tourism, cultural tourism and touring holidays to the mountains and on the lakes, a brief rest.

Almaty cluster is a cluster including Almaty and the part of Almaty region. In the future, the cluster can be extended and shall include other parts of the Almaty region, as well as provide new places of tourist interest, such as Lake Balkhash and the mountain chain of Dzungarian Alatau with Eshkiolmes petroglyphs included in the preliminary list of UNESCO, as well as the Issyk kurgans and places of interest included into the "Silk Road" Serial and Transnational Nomination. Almaty will become a center of the international mountain, business and mountain skiing tourism and will be positioned as the cluster named "Entertainments in the City and in Mountains". This cluster will present main tourism products such as the MICE-tourism, cultural tourism and touring holidays in the mountains and on the lakes, a brief rest.

East Kazakhstan cluster includes north and east parts of the East Kazakhstan Region. Ust Kamenogorsk will be the cluster center. In the future, the cluster can be extended, including the remaining part of the East Kazakhstan Region, including Alakol State Nature Reserve, "Berel" State Historical and Cultural Reserve. East Kazakhstan cluster will be positioned as "the world of natural wonders" and will be an eco-tourism development center. The main tourism products, to be developed in this cluster, are active and adventure tourism, vacation in the mountains and on the lakes.

South Kazakhstan is a cluster that includes the central and eastern part of the Kyzylorda Region, the southern part of the South Kazakhstan Region and the south-western part of the Zhambyl Region. Shymkent will be the cluster center. In the future, the cluster can be extended, including the remaining parts of all three regions, providing new places of tourist interest, such as the Turkic sanctuary Merke included in the preliminary list of UNESCO and the Barsa-Kelmes State Nature Reserve as well as places of interest included into the "Silk Road" Serial and Transnational Nomination. South Kazakhstan cluster will be positioned as "The Heart of the Great Silk Road". The main tourism products to be developed in this cluster will be cultural tourism and around trip.

West Kazakhstan is a cluster which includes all the Mangystau Region and the part of the West Kazakhstan Region. Aktau will be the center of this cluster. West Kazakhstan cluster will be positioned as "Caspian Riviera". The main tourism products to be developed in this cluster will be coastal tourism, cultural tourism and around trip. Within implementation of "International Transport Corridor Western Europe - Western China", the creation of modern tourist infrastructure for placement, rest and receiving of necessary services by tourists with a binding to unique places of interest for tourists of regions and with the corresponding conditions on the west and east "boundary gates" of the Republic is supposed.

Thus, the development of the tourism industry in accordance with the designated clusters will ensure the achievement of national objectives of economic diversification and improvement of the population well-being of the Republic of Kazakhstan.

Conclusion

Analysis of the implementation of the Kazakhstan cluster initiative in the tourism industry, originating from 2004 has shown that the results are mostly negative, rather than positive. In this regard, the "Concept of the Formation of Promising National Clusters of the Republic of Kazakhstan till 2020" was developed in 2013 for the purposes of institutional, methodological, organizational bases for development of perspective national clusters, their scientific and educational, infrastructure and personnel support. "The Concept of Tourism Industry Development until 2020" was adopted in 2014, within which five tourist clusters will be realized.

According to the documents, the further development from the industrial clusters based on creation of chains of a value added in traditional sectors of economy to the innovative clusters based on key competences, a transfer of knowledge and technologies and innovative business will become a basis of a new stage of cluster policy.

The cluster policy will be directed to transfer the national economy to a new technological platform, formation of branches with high performance level, a value added and extent of repartition of production and services. The tasks of cluster policy are:

- formation of favorable conditions for the development of promising national clusters in traditional sectors of the economy, taking into account the global trends and technological development prospects;
- creation of perspective national clusters, capable to provide a stable, "smart growth" in the future and create new competitive advantages of the country;
- formation of innovative environment for the formation of long-term basis of a modern economy.

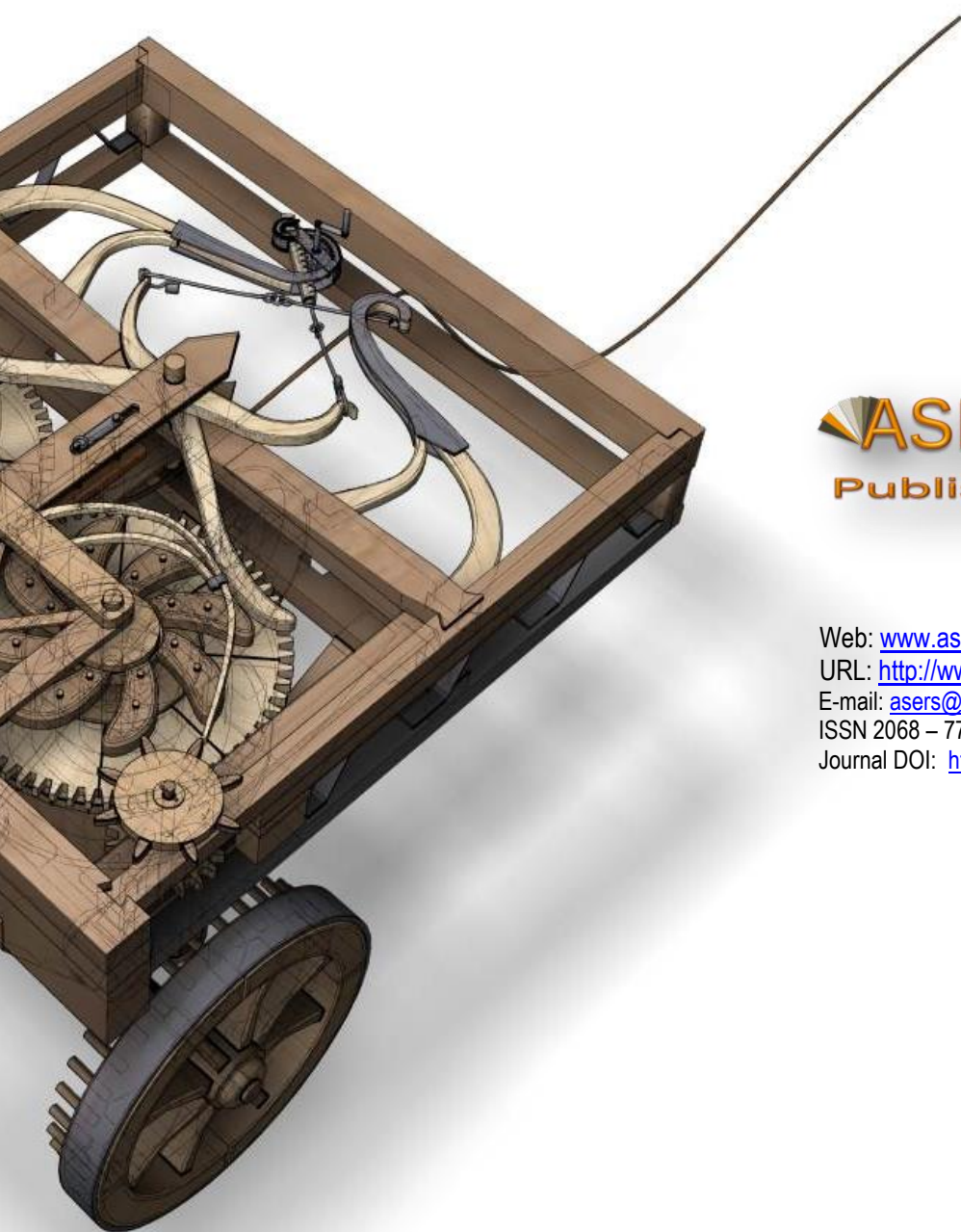
Therefore, it is clear that we must develop a competitive tourist cluster meeting the high demands of tourists and foreign visitors, contributing to the creation of new high-quality and modern jobs, attracting foreign investments and promoting Kazakhstan in the world tourism market.

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