

## Comparative Analysis: Strategic Planning for the Kazakhstani Tourism Industry

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**Abstract.** *Study of the process and content of the evaluation of strategic and program documents, assessment of regulatory impact in the Republic of Kazakhstan, and determination of further prospects for assessment development. Analysis of the strategic and program documents of national and regional government bodies regulating the development of the tourism industry, the allocation of tasks and targets for the development of tourism, as well as the risks of the implementation of tourism development programs. Evaluation of these instruments is carried out using the SMART method, and guidelines for the development of programs for regional tourism development are given. The analysis identified problems that contribute to the further development of the assessment. For performance-based management, it is proposed to introduce changes to the basic provisions, principles, system parameters and algorithm for rating the activities of central and local tourism development authorities to improve the competitiveness of tourism clusters at the national and regional levels. The scientific novelty lies in the study of the relationship between the genesis of the evaluation of strategic and program documents from the moment of the formation of the state planning system in the Republic of Kazakhstan.*

**Keywords:** *tourism industry, strategic planning, strategic and program documents, state strategic planning*

**Raktažodžiai:** *turizmo pramonė, strateginis planavimas, strateginiai ir programos dokumentai, valstybinis strateginis planavimas*

## Introduction

Effective development of domestic and inbound tourism in the Republic of Kazakhstan is possible subject to the formation of a competitive environment and the development of appropriate strategic management at the national and regional level, and the relationship with strategies at the micro level. This requires studying and understanding the institutional features of the strategic management of the tourism industry, identifying the main factors influencing the formation of a strategy at the micro level, developing a methodology for assessing the effectiveness of public administration in the tourism sector, and creating a competitive environment in tourism based on a combination of government and market mechanisms for self-regulation in tourism.

Both in the annual Addresses of the Head of State (in particular, “Kazakhstan’s Way – 2050: Common Goal, Common Interests, Common Future” and “Nurly Zhol – The Way to the Future”) and the State Program for Industrial and Innovative Development of the Republic of Kazakhstan, development of the tourism industry has been referred to as a priority. Until tourism, recreation, and the other potentials of the various regions of Kazakhstan are used effectively, tourism cannot become a profitable sector of the economy. The Concept for the Development of Tourism until 2023 has been approved as a key strategic document. The concept provides for the development of six national tourism clusters: Astana: The Heart of Eurasia, Almaty: The Free Cultural Zone of Kazakhstan, the Pearl of Altai, the Revival of the Great Silk Road, the Caspian Gates, and the Unity of Nature and Nomadic Culture. The content of state regulation of the development of tourism is determined by the objectives of state institutions as well as the tools that the state has in pursuing this policy.

Kazakhstan does not yet have a tourism identity, and the region is not known for any particular form of recreation. Tourism products which will be competitive in the international market must be clearly defined, and tourism products that will meet the needs of the domestic market must also be identified, especially for the development of social and youth tourism. The low profitability due to climatic conditions and the short season in some regions of Kazakhstan results in many tourism sites provide poor service quality.

Currently, strategy formation is one of the most effective organizational and economic mechanisms to increase the amount of income that the tourism sector contributes to the national economy. Modernization of the strategic management of the tourism industry is an effective method that helps solve systemic problems through the introduction of tourism management tools which make it possible to make rational use of the natural, recreational, economic, human and management opportunities that are available.

For Kazakhstan, improving the strategic management of the tourism industry is particularly important, as it will allow for more efficient distribution of the managerial influence of state bodies on the optimal development of tourism, as well as economic

opportunities to be used to increase the profitability of the tourism industry. How to improve strategic management in the development of the tourism industry has not been fully studied and requires more attention in terms of scientific research. In particular, strategy development issues, the lack of developed criteria and indicators for the effectiveness of a tourism development strategy, the unresolved problem of measuring and ranking the influence of external and internal factors on the implementation of the adopted strategy, and the lack of effective mechanisms for implementing the adopted strategy have not been sufficiently studied.

The complexity and number of unresolved issues necessitate research to find solutions to the strategic management problems in the development of the tourism and hospitality industry.

### **Methodological bases of management and functioning of the tourism industry in the context of sustainable development**

There are different approaches to the strategic planning process. This article focuses on the work of the following authors: D. Aaker (Aaker, 1995), I. Ansoff (Igor, 1979), M. Porter (Porter, 2005), A. Thompson and A. Strickland (Thompson, 2003), A. Chandler (Chandler, 1962), O. S. Vikhansky (Vikhansky, 2003), L. G. Zaitsev and M. I. Sokolova (Zaitsev, 2002), A. T. Zub (Zub, 2012), V. S. Katkalo (Katkalo, 2003), V. N. Parahlina, L. S. Maksimenko and S. V. Panasenko (Parahlina, 2007), and A. N. Petrov (Petrov, 2012). According to these authors, the emergence of strategic management techniques and their use in practice was due to the development of intra-organizational management systems, growing instability in the external environment, and the conceptual evolution of strategic management.

The aim of this article is to study and evaluate the target indicators for strategic documents to determine the number of system areas directly affecting the level of tourism development.

### **Evaluation of strategic and program documents**

The Republic of Kazakhstan has significant tourism and recreational potential. The country is home to unique natural and recreational resources, as well as objects of national and global cultural and historical heritage. The variety of resources provides an opportunity to develop almost all major types of tourism: beach resort, cultural, educational, business, sports, medical and ecological tourism.

In modern practice, as defined by the World Travel and Tourism Council (WTTC) and the World Tourism Organization (UNWTO), the efficiency of tourism industry development is determined by the competitiveness index of the travel and tourism sector. This index is calculated on the basis of 70 components within three sub-indices: regulatory framework, business environment and infrastructure, and human, cultural and natural resources. The index is compiled every two years. In the

Travel and Tourism Competitiveness Report 2017, Kazakhstan was ranked 81<sup>st</sup> out of 136 countries.

In general, we can agree with the opinion of experts that the tourism industry in Kazakhstan is nowhere near meeting its full potential in terms of development, and is often characterized by paradox. For example, it is often selected as a tourist destination due to its nature and climate. Its diverse flora and fauna and unique UNESCO World Heritage sites are the catalysts for development of the tourism industry. At the same time, the climate is a limiting factor in the development of the tourism industry – the vast breadth of the country and the long off-season require extensive investments in infrastructure development.

Largely due to these circumstances, the level of development of the country's tourism industry is still far from global trends. According to the World Tourism Organization (UNWTO), tourism accounts for approximately 10% of global GDP, but in Kazakhstan this figure was a mere 1% in 2016, despite the growth dynamics. Income from tourism in Kazakhstan is planned to increase to 8% of GDP by 2025.

Similar trends can be observed with employment in the field of tourism. According to the estimates of the World Travel and Tourism Council (WTTC), 8% of the global population is employed in the tourism industry; meanwhile, only a bit more than 1% of the population in Kazakhstan is employed in this area.

*Table 1. Development of Kazakhstan's tourism industry vs. global average*

	2013	2014	2015	2017
Scope of services provided by placements, million KZT	59,714.1	72,618.70	72,597.2	82,853.4
Scope of services for providing food and drinks, million KZT	238,307.70	269,320.50	321,919.0	415,836.9
GDP, million KZT	37,085,327.9	40,754,832.5	40,884,133.6	46,971,150.0
Share of the tourism industry in GDP, %	0.80	0.84	1.00	-
Salary number of employees of travel agencies	6.6	6.5	7.3	7.2
List of employees by placements	50.4	53.9	54.2	56.8
List of employees of sanatorium-resort institutions	10.8	10.3	10.5	10.0
Workforce in Kazakhstan, thousand persons	5,949.7	6,109.7	6,294.9	6,342.8
Share of tourism professionals in workforce, %	1.14	1.16	1.12	1.14
Kazakhstan's rank in the Travel and Tourism Competitiveness Index (out of 141)	88		85	81
Share of the tourism industry in global GDP	10%			
Share of tourism professionals in global workforce	8%			

Source: Statistics 2016.

Weakly expressed trends affect the rating change. Over the past five years, Kazakhstan has improved its position in the tourism and travel competitiveness index, moving from 88th to 81st place.

It should be noted that for the past 15 years, the tourism sector has officially been one of the priorities in the development of Kazakhstan's economy. Much effort has been put into stimulating the development of the tourism industry. Initially, the development of tourism and hospitality was included in the Concept for the Development of Tourism in the Republic of Kazakhstan dated March 6, 2001; this concept was created by the Council for Tourism under the Government of the Republic of Kazakhstan, which is now an advisory body in the field of tourism development.

In the State Program for Accelerated Industrial and Innovative Development of the Republic of Kazakhstan for 2010–2014, the tourism industry was identified as a development priority. Regional master plans were compiled for the development of tourism, and the Burabay special economic zone was established in the Akmola region until December 1, 2017 in order to stimulate entrepreneurial activity.

In the national strategy, President Nursultan Nazarbayev announced “100 concrete steps to implement five institutional reforms”, with considerable attention going to the tourism sector:

Step 57: Attracting strategic (anchor) investors with successful experience in creating tourism clusters.

Step 69: Transforming Astana into a Eurasian business, cultural and scientific center, attracting researchers, students, entrepreneurs and tourists from all over the region. At the same time, a modern international transport and logistics system will be created in the city, including a new airport terminal.

Step 86: Development and implementation of “Big Country – Big Family”, a large-scale project of the Assembly of the People of Kazakhstan which will strengthen Kazakhstan's identity and create conditions for the formation of an integral civil society. All of this work will be linked to the implementation of the Concept for the Development of the Tourism Industry of Kazakhstan until 2020 (taking into account the development of domestic tourism) and the establishment of regional cultural and tourism clusters: Astana: The Heart of Eurasia, Almaty: The Free Cultural Zone of Kazakhstan, Unity of Nature and Nomadic Culture, Pearl of Altai, Revival of the Great Silk Road, and the Caspian Gates.

Step 87: Development and implementation of “Menin El”, a national project to strengthen civic identity within the framework of which the implementation of a series of technological projects is envisaged. One such project is the creation of the “Encyclopedia of Kazakhstan”, a large-scale Internet project that will help citizens and foreign tourists learn more about the country. The portal will feature 3D video tours of Kazakhstan and present information about the country's history and culture, interesting events, and the lives of ordinary people. The portal will be Kazakhstan's

“business card”, serving as a country guide, a national hall of fame, and a platform for online discussion.

Following the Address of the Head of State entitled “Socio-economic Modernization: The Main Vector in Kazakhstani Development”, the following plans were drawn up: the master plan for the development of the tourism industry in Astana, in light of EXPO-2017; the system plan for the development of the Burabay resort zone until 2020; the master plan for the cluster tourism development program in the East Kazakhstan Region; the system development plan for the Almaty ski area; and the system plan for the development of the Kenderli resort zone.

Currently, the main strategic document for the development of the tourism and hospitality industry in Kazakhstan is the Concept for the Development of the Tourism Industry of Kazakhstan until 2020, which was approved by Government Decree No. 508 of May 19, 2014. This concept summarizes the fundamentally new approaches to the development of the tourism industry in Kazakhstan, primarily identifying six key tourism clusters:

- Astana: The Heart of Eurasia (Astana);
- The Pearl of Altai (tourism potential of the East Kazakhstan Region);
- Almaty: The Free Cultural Zone of Kazakhstan (ski resorts near Almaty, Ile-Alatau National Park);
- Revival of the Great Silk Road (architectural and archaeological heritage of the Turkistan Region, Sayram-Ugam National Park);
- Caspian Gates (Kenderli resort);
- Unity of Nature and Nomadic Culture (Burabay-Shuchinskaya resort zone, Akmola and Karaganda regions, the south-western part of North Kazakhstan and the western part of Pavlodar regions).

To implement the development of tourism clusters, the following measures are being taken to stimulate the tourism industry:

#### I. Measures to improve the regulatory framework:

- A set of measures to rationalize land use in specially protected areas (PAs) and areas rich in water and forest resources, designed to provide an unimpeded opportunity for bona fide investors to build and manage tourism properties with minimal permits but with a clear process of environmental monitoring;
- The introduction of special tourism zones, involving budget investments in infrastructure, opportunities for foreigners without residence permits to purchase real estate, and the possibility of obtaining a license for gambling establishments;
- The introduction of a co-financing mechanism by the state and the employer for employees to purchase tourism services in Kazakhstan, including those of a recreational nature, as a tool for developing domestic social tourism;
- Additional tax incentives for the tourism industry;

- A set of visa, border and migration control measures designed to make it much simpler to plan and organize trips to Kazakhstan for foreign tourists, including mass tourism from key markets in Russia, China, Europe, India, the Middle East and the OECD member countries;
- Creation of competitive conditions for the development of the domestic air travel market, including continued development of the program for subsidizing domestic flights;
- A set of measures to simplify foreign ownership of tourism properties, as well as the introduction of new forms of timeshares.

II. Measures to develop engineering and transport, tourism and the soft infrastructure and to improve the institutional structure.

A list of priority regional transport infrastructure facilities has been defined: airports, railway and bus stations and highways that need to be built or reconstructed within the existing financing mechanisms. Furthermore, proposals were developed to improve the urban and intra-resort infrastructure with financing from local budgets (signs, street furniture, etc.).

For equity financing of the development of tourism clusters, it has been proposed to create an operator represented by a subsidiary of Samruk-Kazyna JSC as an organization under the Ministry for Investment and Development of the Republic of Kazakhstan.

All of the activities are planned to be implemented in three stages:

Stage 1. By 2016, it was planned to adapt and create new legal and institutional mechanisms to facilitate the development of the tourism industry in Kazakhstan. It was planned to absorb about 30% of all investments, which is approximately USD 2 billion to prepare and begin major projects in the field of tourism. In addition, investments were made in the development of a common tourism infrastructure, and destination branding was undertaken. According to the concept, the main outcomes of the first stage are expected to be an increase in the flow of tourists to 4.1 million arrivals and an increase in the number of overnight stays to 13.3 million. Accordingly, tourism revenues are planned to reach USD 4.6 billion.

Stage 2. This is the main stage and was designed for two years: 2017–2018. About 40–45% of all investments that went to finance the construction of accommodation sites and tourist infrastructure facilities as part of the development of national tourism projects were mastered. The main outcomes of this stage are expected to be an increase in the flow of tourists to 6.5 million arrivals and an increase in the number of overnight stays to 23 million. Accordingly, tourism revenues are planned to reach USD 7.6 billion.

Stage 3. This is the final stage, which will focus on the diversification of tourism products throughout Kazakhstan and the development of small- and medium-sized businesses in the field of tourism. The expected outcomes at this stage are an increase in the flow of tourists to 8.5 million arrivals and an increase in the number of over-

night stays to 33.8 million. Accordingly, tourism revenues are planned to reach USD 10.2 billion.

Table 2 summarizes the overall expected outcomes of implementation of the concept as well as their actual values from 2013 to 2015.

**Table 2. Concept for the Development of Tourism: Planned and actual outcome**

	2013 actual	2014 plan	2014 actual	2015 plan	2015 actual
Total bed-places	92,053	109,331	109,094	124,609	118,355
Occupancy rate, %	21.4	24.8	22.0	28.1	23.5
Total overnight stays, days	7,186,444	10,979,809	7,212,995	14,773,174	7,017,070
Average stay, days	2.17	2.43	1.89	2.69	1.84

*Continuation of Table 1*

	2016	2017	2018	2019	2020
Total bed-places	140,887	157,166	173,444	189,722	206,000
Occupancy rate, %	31.5	34.9	38.3	41.6	45
Total overnight stays, days	18,566,539	22,359,905	26,153,270	29,946,635	33,740,000
Average stay, days	2.96	3.22	3.48	3.74	4

*\*Source: Statistics 2016*

After completion of Stage 1 of the Concept for the Development of Tourism in Kazakhstan, we can say that the outcome is modest. This is confirmed by a slight increase in the number of non-resident visitors (Table 3).

**Table 3. Number of non-residents who entered the Republic of Kazakhstan**

	2011	2012	2013	2014
Number of non-residents who entered the Republic of Kazakhstan	5,685,132	6,163,204	6,841,085	6,332,734
from:				
CIS countries	5,195,043	5,542,447	6,213,390	5,655,246
non-CIS countries	490,089	620,757	627,695	677,488

*\*Source: Statistics 2016*

Since 2011, there has been a slight increase in the number of non-resident visitors, with nearly 90% coming from CIS countries. As shown in Figure 1, Kazakhstan had 5,303,373 visitors from three CIS countries (Uzbekistan, Kyrgyzstan and the Russian Federation) in 2015, which accounts for 71% of the total number of people who visited.



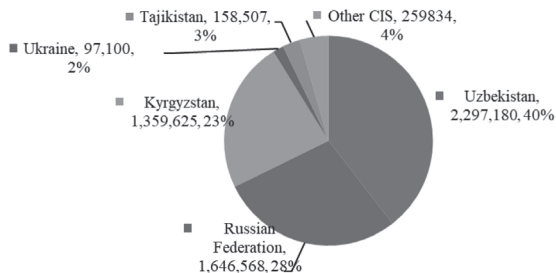


Figure 1. Breakdown of CIS visitors, 2015

\*Source: Tourism in Kazakhstan 2011–2015, 2015

The main reason for entry among citizens of CIS countries is labor. Kazakhstan’s labor-intensive economy as well as the active development of the country’s construction and wholesale and retail trade sectors have created a growing demand for workers with largely low or average qualifications. It is also worth noting that the country’s agricultural sector, which accounts for 10% of the GDP and development which is typical mainly extensive character development also contributes to the labor deficit.

An important factor in the migration processes in Kazakhstan is its close proximity to “donor countries” in the labor force. More centers should be allocated according to geographical distribution in order to attract as many migrant workers as possible. This includes the cities of Astana (both due to the high wage level and the amount of construction and installation being done) and Almaty (the financial and trade sector), the western region of Kazakhstan (the oil-producing regions: Mangistau, Atyrau oblasts), and the southern regions of the country, directly Neighbouring work-force donor countries (mainly agricultural regions).

Outside of the CIS, China, Turkey and Germany were dominant, with 306,353 people visiting Kazakhstan from these three countries in 2015, which accounts for 52% of all non-CIS entries (Figure 2). The main reason is the same – labor.

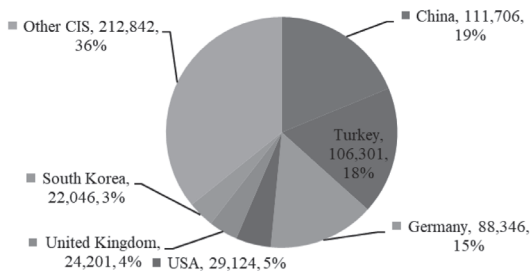


Figure 2. Breakdown of other non-CIS visitors, 2015

\* Source: Tourism in Kazakhstan 2011–2015, 2015

As of January 1, 2016, the country operates 30,728 permits for foreign labor by employers (tengrinews.kz 2015). The majority of foreign workers are employed in the construction sector (20,800 people, or 66.5%), the mining industry (2,300; 7.4%) and the processing industry (1,600; 5.2%). Some 42.9% of foreign workers are specialists, while 28.2% are skilled workers, 20.6% are department managers, and 6.5% are deputy managers.

In order to protect the domestic labor market, the Government of the Republic of Kazakhstan establishes an annual quota for foreign experts. The size of the quota is constantly decreasing, from 2.4% of the economically active population in 2007 to 0.7% in 2016 (365info.kz 2015).

Thus, the main reason for visiting Kazakhstan is labor, which is not a direct result demonstrating the success of the tourism industry.

In such a situation, the prospects for the development of Kazakhstani tourism are largely dependent on the role of the state in the tourism sector. It should be noted that since 2010, there has been considerable activity in the reorganization of the system of public administration in the field of tourism. Moreover, the level and status of central government authorities in the regulation and development of the tourism sector has gradually decreased: the Ministry of Tourism and Sports of the Republic of Kazakhstan until 2012; the Tourism Industry Committee under the Ministry of Industry and New Technologies of the Republic of Kazakhstan until 2014; the Tourism Industry Department under the Ministry of Investment and Development of the Republic of Kazakhstan until 2016; the Committee of Tourism Industry under the Ministry of Culture and Sports of the Republic of Kazakhstan since 2017; the Department of Tourism under the Ministry of Investment and Development of the Republic of Kazakhstan.

We believe that this part of the transformation of state regulation in the sphere of tourism has caused a number of problems associated with a lack of a clear understanding of development priorities, and, frankly, that it has effectively hindered the development of tourism in Kazakhstan. This is evidenced by comparing the targets outlined in the strategic plan of the Ministry of Investment and Development of Kazakhstan for 2014–2018 (approved by Order No 256 of December 9, 2014 of the Minister of Investment and Development of the Republic of Kazakhstan) with the expected outcomes of the aforementioned concept (Order of the Minister of Investment and Development of the Republic of Kazakhstan, 2014).

This strategic plan for the tourism sector identifies the strategic goal of “creating a competitive tourism industry”. This goal is defined by only two target indicators, the values of which are presented in Table 4.

Table 4. Strategic target indicators for the tourism industry in Kazakhstan

Target indicator	2015 plan	2015 fact	2016 plan	2017 plan	2018 plan
Non-resident nights spent in tourist accommodation establishments	587,240	692,250	587,759	588,798	589,836
Resident nights spent in tourist accommodation establishments	2,950,745	3,115,416	3,051,025	3,196,431	3,299,219

\* Source: Order of the Minister of Investment and Development of the Republic of Kazakhstan, 2014

As the table shows, the actual non-resident nights spent in tourist accommodation establishments in 2015 already exceeded the plan, and is even 17% above the planned level for 2018. Meanwhile, the actual resident nights spent in tourist accommodation establishments in 2015 exceeded the planned values for both 2015 and 2016.

However, the Concept for the Development of the Tourism Industry of Kazakhstan until 2020 was approved by the Government of the Republic of Kazakhstan six months earlier, and contained completely different targets. The concept provides for 6.5 million arrivals in 2018, which is almost double the level planned by the Department of Tourism under the Ministry of Investment and Development of the Republic of Kazakhstan and the Committee on the Tourism Industry under the Ministry of Culture and Sports of the Republic of Kazakhstan.

The strategic tourism goals are financed under the budget program 088 (“Formation of a national tourism product and its promotion in the international and domestic market”) with annual funding of KZT 219.114 million. Indicators for the direct result of this budget program are shown in Table 5.

Table 5. Strategic target indicators for the Kazakhstani tourism industry

Direct result indicators	Unit	Planning period		
		2016	2017	2018
Kazakhstan’s participation in international tourism exhibitions	events	7	7	7
Number of domestic tourism activities	activities	4	4	4
Number of travel websites	websites	1	1	1
Amount of promotional and informational materials about Kazakhstan’s tourism potential distributed to international (foreign) activities	pieces	9,500	9,500	9,500
Expenditures for budget program 088 (“Formation of a national tourism product and its promotion in the international and domestic market”)	million KZT	219.114	219.114	219.114

\* Source: Order of the Minister of Investment and Development of the Republic of Kazakhstan, 2014

In general, the activities of the department are reduced to participation in international tourism exhibitions. According to the progress report for 2015, the Tourism Industry Department arranged for Kazakhstan to participate in a number of international tourism exhibitions in 2015: ITB (Berlin), Intourmarket (Moscow), ATM (Dubay), ITE (Hong Kong), PATA Travel Mart-2015 (Bangalore), JATA-2015 (Tokyo) and WTM (London).

On December 14, 2015, a memorandum was signed between the Ministry of Investment and Development of the Republic of Kazakhstan and the China National Tourism Administration on simplifying Chinese tour group trips to the Republic of Kazakhstan. This will help to increase the influx of tourists from China.

In terms of domestic tourism events, of note are the Kazakhstan International Exhibition KITF that was organized in April 2015 in Almaty, the annual Ile-Balkhash Regatta that took place in May 2015, and the national seminar on effective participation in exhibitions that was held in September 2015 at the Astana Leisure 2015 event.

For a more detailed assessment of the activities of the Tourism Industry Department, we will use the SMART method, a tool commonly used in management which assumes that any goal must be Specific, Measurable, Attainable, Realistic, and Time-bound. For the assessment, 30 people were selected as experts: 15 employees from the tourism industry, 10 staff members from universities who teach undergraduate tourism, and five civil servants. According to the SMART method, experts were asked to evaluate the strategic goal, target indicators and indicators of the Tourism Industry Department and score them on a 10-point scale. The evaluation criteria are presented in Table 6.

Table 6. Evaluation criteria

Evaluation based on SMART criteria	Determining the final score (FS)	Maximum FS	Range FS	Level
Each target indicator and task indicator is evaluated by the experts based on SMART criteria	FS is defined as arithmetic mean	50	$10 < 30$	Unsatisfactory
			$30 < 10 < 40$	Needs improvement
			$40 < 10 < 45$	Satisfactory
			$45 < 10 < 48$	Good
Specific Measurable Attainable Relevant Time-bound	-	-	$10 \hat{=} (49.50)$	Excellent

\*prepared by the authors

As indicated in Table 6, the maximum final score is 50 points, since each criterion is of equal weight. The ranges for the FS are rated as follows:

- less than 30: the level of activity of the state body is assessed as unsatisfactory, which indicates that the main provisions and activities are erroneous;
- from 30 to 40: the level of activity is assessed as in need of improvement; there are problems with fragmented activity, non-compliance with the logic and completeness of the solution of the problem;
- from 40 to 45 points: the level of activity is assessed as satisfactory, characterized as fulfillment of the minimum necessary requirements, with only insignificant deviations from the strategic goal;
- from 45 to 48 points: the level of activity is assessed as good – the activity is systematic and deeply covers all areas of the industry;
- from 49 to 50 points: the level of activity is considered to be excellent, which indicates comprehensive fulfillment of all requirements.

Table 7 shows the results of the expert assessment of the activities of the Tourism Industry Department under the Ministry for Investment and Development of the Republic of Kazakhstan.

*Table 7. Expert assessment of the activities of the Tourism Industry Department*

	Specific	Measurable	Attainable	Relevant	Time-bound
Target indicators	6.3	8.1	9.6	3.2	5.8
Direct task indicators	3.4	6.2	9.7	2.4	5.2
Average score	4.9	7.2	9.7	2.8	5.5
Final score (FS)	30.1				

\*prepared by the authors

Unfortunately, the level of activity of the Tourism Industry Department was only evaluated by experts as needing improvement, and was just one-tenth of a point from being assessed as unsatisfactory. The Tourism Industry Department received the lowest scores for the relevance and validity of the selected strategic guidelines. In other words, the department basically seems to be ignoring the real strategic goal for the development of the tourism industry.

## Conclusion

As you know, the goals and objectives of the tourism policy depend on the prevailing economic, political and social conditions in the tourism industry. According to the current policy, it can be concluded that tourism is now only a development priority on paper – the strategic indicators and indicators for the development of tourism do not correspond to reality and the potential of the tourism sector. Furthermore, indicators vary in different program documents and are often contradictory.

Based on the strategic guidelines for the development of the tourism industry stated in the concept, it is possible to identify a number of systemic directions that

directly affect the level of tourism development. In particular, we will show enlarged in separate directions:

1) *Competitive tourist destination on the international tourism market.* Any country that enters the international tourism market also enters into competition with other countries. A country's position in the international tourism market depends on how the tourism policy in the country is adhered to, how effective it is, and how it is implemented. In this regard, Kazakhstan needs to clearly define its niche and segment in the international tourism market and develop a strategic action plan for this.

2) *Development of tourist destinations at the regional or local level.* Many investment projects in the development of regional tourism products remain unimplemented due to a lack of transparency in this area and the significant impact of infrastructural factors. In this regard, we believe that each region is capable of developing and organizing regional tourism products that can satisfy domestic demand in the fields of youth tourism, social tourism, amateur sports tourism, etc.

3) *Development of a cluster network approach based on tourist destinations.* The concept identifies five key tourism clusters. As they currently operate, these areas cannot be called clusters. They are more like prototype clusters, i.e. areas potentially capable of performing tourism functions. Each cluster should be able to create a special tourism brand, perform special functions in the regional system of tourism and recreation, and stand out for its own kind of tourism and recreation. We feel that this requires tourist zoning within each potential tourism cluster and the development of a clustering strategy based on the results.

The proposed changes to the basic provisions, principles, system parameters and algorithm for rating the activities of central and local authorities for the development of tourism will improve the competitiveness of tourism clusters at the national and regional levels.

Kazakhstan has considerably tourism potential, and tourism is identified as a priority in the development of the national economy. However, not a single region of Kazakhstan has a developed tourism infrastructure that offers the attractive and accessible tourism facilities that are so popular among foreign tourists.

The targets specified in the Concept for the Development of the Tourism Industry of Kazakhstan until 2020, as the main strategic document, are more than double those planned by the Committee on the Tourism Industry under the Ministry of Culture and Sports of the Republic of Kazakhstan. This indicates a lack of ownership of the situation on the part of the state.

This is also confirmed by an expert assessment of the performance of the Tourism Industry Department under the Ministry of Education and Science of the Republic of Kazakhstan using the SMART method, which barely resulted in a fair score.

In our opinion, an increase in the number of visitors is not a target indicator for state development agencies – this cannot be a direct result of their work.

Improving the state strategic management system of the tourism sector in Kazakhstan will require concentrated work.

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**Kazachstano turizmo industrijos strateginio planavimo lyginamoji analizė**

Anotacija

Nacionalinių ir regioninių valdžios institucijų strateginių ir programų dokumentų, reglamentuojančių turizmo sektoriaus plėtrą, analizė, skirta šioms problemoms spręsti ir turizmo plėtros tikslams bei turizmo plėtros programų įgyvendinimo rizikai. Šių instrumentų termino įvertinimas naudojant balų ir ekspertų vertinimo metodus „SMART“. Remiantis šia metodika, įvertinta Kazachstano Respublikos strateginiai ir programos dokumentai, atsižvelgiant į regioninių turizmo plėtros programų gaires.

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