



## **On approval of the Concept of Tourism industry development of the Republic of Kazakhstan until 2023**

### *Invalidated Unofficial translation*

Decree of the Government of the Republic of Kazakhstan dated June 30, 2017 No. 406.  
Abolished by the Decree of the Government of the Republic of Kazakhstan dated 03/28/2023 No. 262

#### *Unofficial translation*

**Footnote. Abolished by the Decree of the Government of the Republic of Kazakhstan dated 03/28/2023 No. 262.**

The Government of the Republic of Kazakhstan HEREBY DECREES:

1. To approve the attached Concept of tourism industry development of the Republic of Kazakhstan until 2023 (hereinafter referred to as the Concept).

2. The Ministry of Culture and Sports of the Republic of Kazakhstan within the period of four months shall develop and submit for approval to the Government of the Republic of Kazakhstan the Action Plan for implementation of the Concept.

3. To recognize invalid the decree of the Government of the Republic of Kazakhstan dated May 19, 2014 no. 508 "On approval of the Concept of tourism industry development of the Republic of Kazakhstan until 2020".

4. This decree shall come into force from the date of signing.

*Prime Minister*

*of the Republic of Kazakhstan*

*B. Sagintayev*

Approved by the decree  
of the Government of the  
Republic of Kazakhstan  
dated June 30, 2017 no. 406

## **Concept of tourism industry development of the Republic of Kazakhstan until 2023**

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## 1. ANALYSIS OF THE CURRENT SITUATION OF TOURISM INDUSTRY DEVELOPMENT IN THE REPUBLIC OF KAZAKHSTAN AND INTERNATIONAL EXPERIENCE

The Concept of tourism industry development of the Republic of Kazakhstan until 2023 (hereinafter referred to as the Concept) have been development for the purposes of formation of the uniform institutional, methodological, organizational basis for formation of modern, highly efficient and competitive tourism industry of the Republic of Kazakhstan, including main principles and approaches for its implementation.

The Concept is aimed at the implementation of main principles provided for within the framework of the Plan of the nation - Plan of the nation - 100 concrete steps to implement the five institutional reforms of the Head of State N.A. Nazarbayev (57, 86, 87 steps), as well as the key areas of diversification of economy, defined in the Strategic Development Plan of the Republic of Kazakhstan until 2020, and strategic areas of long-term development of Kazakhstan until 2050, in accordance with the Order of the President of the Republic of Kazakhstan dated January 17, 2014 no. 732 " On the Concept of Kazakhstan joining the top 30 most developed countries of the world".

The Concept have been developed on the basis of approved system plans of tourism development of the Republic of Kazakhstan, Shchuchinsko-Borovsk resort area of Akmola region, ski area near the city of Almaty, Kenderli recreation area, as well as a master plan for a cluster tourism development program in the East Kazakhstan region.

Tourist industry is one of the largest and dynamically developing industries in the world. According to the data of the World Tourism Organization (UNWTO) in 2014, tourism accounts for 9% of world GDP (taking into account direct and indirect effects), 6% of world exports of goods and services. About 100.9 million people are employed in this area, moreover every 11 jobs in the world are created in the tourism sector.

Tourism, influencing such related industries as telecommunications and transport, construction, trade, agriculture and others, contributes to the socio-economic development of the regions.

Kazakhstan, having a rich tourist and recreational potential, is characterized by an insufficient level of tourism development. Its share in GDP (only accommodation and food services are calculated) amounts to approximately 0.9%. In 2015, the volume of income from tourism activities amounted to 236.4 billion tenge, which is almost 2

times higher than the 2010 level (126.5 billion tenge). The number of employees in the industry amounted to 103.6 thousand people. The taxes paid and other obligatory payments from tourist activities to the budget of the republic amounted to 11.0 billion tenge in 2015.

As of the year 2016, 2,031 tourist organizations were operating in Kazakhstan, 2,754 accommodation units with a capacity of 138,062 beds, which is 16.6% higher than the previous year.

It should be noted that of the total number of places of accommodation, 62.4% were hotels, of which 10.1% were hotels with a category, 52.3% were without a category, 37.6% were other accommodations (Fig. 1).

Figure 1. Categories of the places of accommodation

Main part of the places of accommodation (63,3%) is concentrated in East Kazakhstan, Almaty, Akmola, Karaganda, South Kazakhstan regions and Astana city respectively (Fig. 2).

Figure 2. Specific gravity of the places of accommodation in terms of regions

In 2016, the occupancy rate of hotel beds amounted to 23,8% (23,5% in 2015).

In hotels with a category, the average occupancy rate was 24.3%, in hotels without a category - 19.3%. At the same time, the highest occupancy rate is observed in category 5 \* hotels (31.1%), the lowest - in category 1\* hotels (14,6%) (Fig. 3).

Figure 3. The level of occupancy rate in the places of accommodation

The highest occupancy rate of beds in 2016 is observed in the following areas: West Kazakhstan - 29.5%, Atyrau - 27.6%, East Kazakhstan - 26.8% and Aktyubinsk - 24.3%. The lowest occupancy rate was recorded in Zhambyl (15.6%) and Akmola (17.3%) regions. In Astana and Almaty, the hotel occupancy rate was 27.6% and 28.2% respectively (Fig. 4).

Figure 4. The level of occupancy rate in the places of accommodation in terms of regions

The result of significant amount of unclassified objects from accommodation may be poor quality of service and low attendance, taking into account high prices.

Prices for accommodation in the places of accommodation with a high level of hotel services are much higher than in similar hotels in the world's leading tourist destinations. The average cost of a standard room in a 5 \* hotel in Astana and Almaty are approximately 20% higher than the average cost of a standard room in leading European cities and tourist destinations in the world.

Prices for services in other places of accommodation - boarding houses, tourist camps, huts, camping sites, hostels for visitors and others are approximately 25-30% lower.

Overprices are related to the lack of a competitive environment and a strong dependence on business tourists. The tourist services offered, including hotel services, are provided with limited service and are poorly regulated. It should be noted that the high price of accommodation and air tickets significantly increase the cost of a tour to Kazakhstan and, accordingly, reduce its competitiveness by price in the international market.

The growth of the demand for domestic and inbound tourism in Kazakhstan was observed between 2000 and 2007, followed by a decline in 2008 and 2009 due to the economic crisis. With the recovery of economy in 2010, the growth in tourism demand resumed in 2011 and reached a record level in 2014. In 2016, an increase in the number of visitors compared to 2010 was 65.5%, an increase in the number of overnight stays – 34,6% (Fig. 5, 6).

Figure 5. Number of visitors in 2010 and 2016.

Figure 6. Number of overnight stays in 2010 and 2016.

In 2016, the structure of visitors served by placements was characterized by the following indicators:

1) by category of places of accommodation: 81.2% of visitors were accommodated in hotels (42.4% in hotels with a category, 38.8% in hotels without a category), in other places of accommodation 18.8% of visitors. At the same time, in 2013, 86.4% of visitors were accommodated in hotels (42.1% of visitors in hotels with a category, 44.3% in hotels without a category), in other places of accommodation 13.6% of visitors (Fig. 7).

Figure 7. Structure of serviced visitors by categories of the places of accommodation in 2013 and 2016.

2) by regions: 47.1% of visitors were served in Astana (17.4%), Almaty (18.8%) and the East Kazakhstan region (10.9%), while in 2013 these regions accounted for 47.7 % of visitors served (Fig. 8).

Figure 8. Structure of serviced visitors by regions in 2013 and 2016.

3) by countries of origin: 82.8% of Kazakhstan visitors (82.3% in 2013), of non-resident visitors (722 515 people) - 31.4% of visitors from the Russian Federation, 7.4% of visitors from the People's Republic of China, 5 , 9% of visitors from the

United States of America, 5.9% of visitors from the Republic of Turkey, 4.5% of visitors from the Federal Republic of Germany, 2.9% of visitors from the Republic of Italy and 42.0% of visitors from other countries (Fig. 9).

Figure 9. Structure of serviced visitors by countries in 2016

4) by travel purposes: business and professional - 54.1%, vacation and leisure - 45.6%, for other purposes - 0.3%, in 2013, the structure of travel purposes was as follows: business and professional - 60.0%, vacation and relaxation - 33.7%, visits to friends and relatives - 3.7%, religion and pilgrimage - 0.4%, medical and health procedures - 0.4%, shopping - 0.4% and other purposes - 1.4%. It is remarkable that, compared with foreign visitors, Kazakhstan citizens traveled more for leisure and vacation purposes (51.7%), while non-residents mainly for business and professional purposes (81.7%) (Fig. 10).

Figure 10. Structure of the serviced visitors by travel purposes in 2013 and 2016.

Thus, tourism in Kazakhstan is based mainly on the local population, as well as on business and professional trips of foreign residents.

The total number of all foreign residents who entered Kazakhstan in 2016 amounted to 6,509.4 thousand people, which is 1.2% more than in 2015. Most foreign residents came from three neighboring countries: the Republic of Uzbekistan (37.8%), the Russian Federation (24.4%) and the Kyrgyz Republic (20.7%).

The main reasons for the arrival were private visits (75.4%), while business trips were (16.2%), and for tourism purposes less than 1%. (Fig. 11).

Figure 11. The specific gravity of foreign residents arrived to the Republic of Kazakhstan in 2016

Many foreign residents entering Kazakhstan stay with their families or friends, transit or arrive for one day (one-day visitors).

The number of citizens of the Republic of Kazakhstan who went abroad in 2016 amounted to 9,755.6 thousand people, which is 15.8% less than in 2015. Kazakhstani citizens spend 1.6 billion US dollars on international travelling, including tourism, business and other trips, while under the same article non-residents received services worth 1.5 billion US dollars.

Thus, over the years, the country's balance of payments under the item "Travel" has been negative and amounts to about 109.3 million US dollars.

Kazakhstan remains a "tourist donor" for countries such as the Republic of Turkey, the People's Republic of China, the United Arab Emirates, the Kingdom of Thailand, where the tourism industry is developing rapidly, new jobs are being created, the balance of payments structure is improving, and the welfare of the population is growing.

The demand of Kazakhstan tourists for outbound tourism represents a loss of business share for tourist destinations and accommodation facilities in Kazakhstan, so it is natural to assume that with the qualitative development of tourism in the republic, a certain number of domestic tourists vacationing abroad now will prefer Kazakhstan tourist destinations, spending on tourism within the country.

The main reasons that impede the accelerated development of tourism in Kazakhstan include:

1) insufficient development of engineering, transport and social infrastructure in places of tourism, inaccessibility of tourist facilities, low level of service in places of recreation for tourists, insufficient quantity and quality of service of roadside infrastructure facilities;

2) lack of qualified personnel in the tourism sector, including the academic nature of education, some isolation of educational programs from labor market requirements, production needs, employers' expectations, etc.;

3) visa and migration formalities;

4) insufficient level of coordination of the concerned state bodies to implement an integrated approach to the development of the tourism industry, including cultural and sports areas;

5) poor marketing and branding;

6) low investment attractiveness.

Analyzing the change in the main economic indicators of tourism development, we can make a conclusion that the potential of Kazakhstan tourism is not fully realized, since the development of the tourism industry directly depends on the creation of a modern competitive tourist complex, including natural and climatic conditions, tourist attractions, and the necessary infrastructure (transport, aviation, railway, engineering and communication, “soft”), including the reconstruction of points of entry across the State border of the Republic of Kazakhstan, places of entertainment, catering facilities etc., providing opportunities for satisfaction of the needs of local and foreign citizens in the tourist services.

The creation of a modern competitive tourist complex can make a significant contribution to the development of the country's economy through tax revenues to the budget, the influx of foreign currency, an increase in the number of jobs, as well as ensuring control over the conservation and rational use of cultural and natural heritage.

The state support for tourism is a prerequisite for sustainable development of the industry. International experience shows that an active state policy aimed at creating conditions for the development of tourism infrastructure, attracting private investors, creating a regulatory framework that provides favorable economic conditions for the activities of tourism industry entities, allows the tourism industry to take an important place in the socio-economic development of the country.

In addition, the world's experience evidences that the countries actively developing tourism, allocate significant budgetary funds to implementation of the national projects and programs, providing their citizens with high quality touristic services.

This Concept provides recommendations of major international consulting companies Horwath HTL, Ecosign Mountain Resort Planners Ltd, THR, IPK International, as well as the results of studies of tourism potential in Kazakhstan in 2012.

Analysis of the international experience of the countries, determined tourism as the priority area of the economy, showed a number of the most effective measures of state support for touristic activities:

1) direct political will and support for a number of years by the country's leadership to combine conflicting priorities.

The Kingdom of Morocco. In the early 2000s, King Mohammed VI of Morocco approved the status of tourism as a strategic sector of the economy. The Government of Morocco has developed a Vision 2010 tourism development strategy. An essential element of this strategy was the plan to build six new coastal resort areas from scratch (Azur Plan).

To implement this plan, in 2007 it was decided to create a new operator for investing in tourism infrastructure - SMIT (Moroccan Society of Tourism Engineering) based on several state-owned enterprises. SMIT implements the following tasks: allocation of land for the construction of new coastal resort areas; development of master plans and FS for the development of these zones, the purchase and sale of land, the construction of infrastructure and attracting private investors. Moreover, in the implementation of the Vision 2010 strategy, liberalization of air traffic in the framework of the 2006 bilateral agreement on open air space with the EU was of great importance for the tourism industry of the country.

The liberalization of air traffic consisted mainly of authorizing the air carriers of new airlines and European low-cost air carriers with the right to land; the creation of new national low-cost airlines AtlasBlue, Jet4You and new air routes. These measures led to a significant reduction in airfare and a general increase in the international flow of passengers (tourists).

Malaysia. Since the 90s, tourism has occupied a prominent place in the five-year economic development plans of Malaysia. Within the framework of these plans, a strategy was developed for the development of rural, ecological, cruise and other types of tourism by providing tax benefits (exemption from income tax or benefits when reinvesting in the expansion and modernization of hotels and other tourist facilities; full exemption from import duties).

2) direct financial participation of the state in the development of large resort areas through the creation of specialized agencies, funds and operators.

The United Mexican States. In the 70s, the Government created the National Tourism Development Fund - FONATUR on the basis of the merger of the two funds INFRATUR (Fund for the Development of Tourism Infrastructure) and FOGATUR (Guarantee and Promotion Fund for Tourism). The main objective of FONATUR was the greenfield development of the five largest coastal resort areas - Cancun, Inca, Los Cabos, Hautulco and Loreto. In order to develop these resorts, FONATUR took a leadership role not only in attracting borrowed funds and private investors, urban planning and regional planning, but also in matters of land ownership and the real estate market. Nowadays, taking into account the results already obtained, FONATUR has taken a secondary role in the development of resorts and has focused on the development of public-private partnerships.

The Kingdom of Spain. In the 60s, the state-owned company ENTURSA was created, which was engaged in the construction and management of hotels designed for a more extensive beach holiday. Subsequently, most of these hotels were privatized.

3) financial benefits and mechanisms of supporting the investments in tourism facilities.

The Arab Republic of Egypt. In the 70s, the Law on the Establishment of Free Economic Zones and the Permission to Create Joint Ventures by State Companies and Foreign Investors was passed, under which foreign investors became eligible to invest as a junior partner in joint ventures, were exempted from taxes for up to fifteen years, obtained guarantees from the state regarding property rights to land plots.

Foreign investors also obtained guarantees from the state regarding capital, being authorized for, as well as local companies with foreign participation, exporting the proceeds abroad;

4) direct government funding for the creation of engineering and communications, transport and soft tourism infrastructure (provision of qualified human resources, information support), as well as the creation of the most significant projects in the tourism industry.

The United Arab Emirates. In 2006, a tourism development and investment company was established. The government of the United Arab Emirates allocated about 3 billion US dollars in the form of grants, on the basis of which the company attracted significant borrowed funds abroad. The main project has been the construction of the artificial island of Saadiyat.

The Republic of Turkey. In the 70s, the Government of the Republic of Turkey developed regional plans for tourism development projects and initiated infrastructure development projects for the industry.

Thus, international experience shows that the active role of the executive in the infrastructure support of tourism development is one of the significant success factors. The forms of state support for tourism development are quite diverse. At the same time



, we can highlight some examples that correspond to the current situation in the field of state regulation of the tourism industry in the Republic of Kazakhstan for a number of signs:

1) the active role of the state in modernizing the country through direct participation in the economy;

2) lack of natural development of resort areas, as a rule, due to remoteness, lack of infrastructure and underdevelopment of the domestic market regarding sanatorium-resort tourism.

In examples with similar features, the state has actively created a new offer in tourism through the centralized development of the resort from scratch, the construction of infrastructure and tourist facilities. Commercial facilities in these resorts were built either at the expense of public funds or with the attraction of private investment. As a rule, the state created for these purposes a national operator whose activities were of quasi-commercial nature.

All these examples can be called successful both in terms of a powerful impetus for the tourism industry development in the country, and taking into account the return on public investment.

## 2. VISION OF TOURISM INDUSTRY DEVELOPMENT IN THE REPUBLIC OF KAZAKHSTAN UNTIL 2023

There are several main economical and social prerequisites for consideration of tourism as one of the national priority areas of economical development in the Republic of Kazakhstan:

1) increase income, government revenues, improving social well-being, the ability to create new jobs, including provision of employment in rural and remote areas, youth without departing from the traditional way of life;

2) Assistance in development of a culture of entrepreneurial activity among the general population by creating opportunities for family, small and medium-sized businesses, including through the implementation of anchor tourism projects in the most promising areas of tourist clusters;

3) contribution to the development of regions and rural areas of the Republic of Kazakhstan, including the development of engineering, transport and tourism infrastructure in remote areas, the infrastructure of checkpoints across the state border of the Republic of Kazakhstan;

4) assistance in cooperation and creating opportunities in other sectors of the economy, including agriculture, transport, trade, engineering, light and food industries, creative industries, non-manufacturing sectors;

5) assistance in creation of positive and productive intercultural relations that facilitate the promotion of national and interstate mutual understanding, including the promotion of socio-cultural, ethnographic, medical, sports, cultural and educational,

scientific, children and youth and other types of tourism, contributing to the promotion of the values of the national idea "Mangilik El";

6) increasing the recognition of the republic in the regional and global markets through active country marketing and promotion of the Great Silk Road brand;

7) rich historical and cultural heritage of Kazakhstan included in the UNESCO World Cultural Heritage List, and the State List of Republican Monuments of History and Culture.

In order to achieve the national goals of diversifying the economy and improving the welfare and quality of life of the population of the republic, the tourism industry should develop in certain tourism clusters with a competitive tourism business, the basis of which is qualified workers offering attractive tourism products for both domestic and foreign tourists. Development in this direction should contribute to a powerful and sustained growth of income from tourism activity for all concerned parties - the state, business and employees.

The development of inbound and domestic tourism in Kazakhstan will depend on a number of market trends in general in tourism, the economy, demography, ecology, technology and other areas.

Main long-term tendencies of tourism as a whole shall be:

1) sustainable development of international tourism with subsequent increase in the number of international arrivals and income from the international tourism, which ensures as a whole the positive market basis for development tourism industry in Kazakhstan;

2) the growing tourist demand for emerging foreign markets such as the People's Republic of China, the Republic of India, the Middle East and the Russian Federation. The geographical position of these countries provides an opportunity to develop tourism products for these markets and is relatively easy to implement due to their territorial proximity to Kazakhstan;

3) relatively high and sustainable demand in the developed external markets, such as Europe, which provides Kazakhstan with an opportunity to implement in these markets its attractive and unique tourism products;

4) a growing tourism offer from developing destinations such as the Republic of Azerbaijan, the People's Republic of China, Georgia, the Kyrgyz Republic, Mongolia, the Russian Federation, Turkmenistan and the Republic of Uzbekistan, which in the future is likely to compete with Kazakhstan's tourism offer.

High and intense competition among developed tourist destinations requires from Kazakhstan's analogues to have adequate positioning in this market, as well as the ability to adapt to its constantly changing conditions.

Main long-term economical tendencies shall be:

- favorable economic prospects and the expected growth of GDP, income and a tendency to travel among consumers within Kazakhstan and in developing foreign markets, such as the People's Republic of China, the Republic of India, the Middle East and the Russian Federation, which provides the opportunity to develop and sell tourism products both in domestic and external emerging markets, especially those located near Kazakhstan;

- economic instability of the developed markets such as Europe and the United States of America, leading to increased consumer price sensitivity, which, in its turn, poses a serious threat to premium tourism products, but at the same time increases the competitiveness of mass tourism products.

Main long-term demographical tendencies shall be:

1) increase in the number of people of middle and retirement age, especially in developed markets, such as Europe, which provides an opportunity for the development and sale of tourism products to consumers of a more mature age: off-season, cultural, wellness and spa tours, etc.;

2) decrease in the amount of free time for the working population, leading to an increase in the number of short-term rest breaks during the year;

3) growing embrace of the outdoor activities among young people, giving the opportunity to design and implement a variety of adventure tours;

4) the growing tendency of people of all ages to “cosmopolitanism” in behavior (or lifestyle) - the pursuance of travel around the world, getting acquainted with other cultures and landscapes, which represents an opportunity for the development and implementation of a number of tours and positioning Kazakhstan as a new tourist destination with unique tourism products;

5) a growing pursuance of self-development and / or “self-challenge”, especially among consumers of developed foreign markets, such as Europe, providing opportunities for the development and implementation of “creative” tourism products.

Main long-term ecological tendencies shall be:

1) the growth of public awareness in the field of preservation and protection of the environment, which makes it possible to develop and sell tourism products "in the lap of nature" that are environmentally sustainable: hiking, cycling, horseback riding and bird watching;

2) changes in the economy of the country caused by climate change, make it necessary for local service providers, tour operators and transport companies to adapt to new conditions.

Main long-term tendencies in the field of technologies shall be:

1) the intensive development of air services through the introduction of new routes, the creation of new (low-cost) air carriers, the modernization of existing airports and

the construction of new ones, which, combined with the growing use of the Internet, reduces travel costs and increases the number of trips;

2) the increase in the use of environmentally friendly and energy-saving technologies and processes in the construction and operation of facilities, which, in its turn, has a positive effect on the image of facilities that implement such technologies, attracting more tourists;

3) the growing use of the Internet for the search and purchase of tourism products, inducing the availability of the Internet presence of companies, both for advertising and sales of tourism products;

4) increase in the use of various technological applications in all sectors related to tourism, - applications for smart phones, connected with tourism and hospitality industry, GPS for car, etc..

Main long-term tendencies in other areas shall be:

1) a growing tendency towards health, personal safety and well-being, implying the need to establish and maintain high quality standards in all matters related to health and hygiene, safety and well-being, and, in its turn, making some tourist destinations more attractive than others;

2) the growing number of destinations, cancelling or weakening visa requirements to incoming tourists, allowing the countries with a visa-free or simplified visa regime to attract more foreign tourists.

### 3. GOALS AND OBJECTIVES OF THE CONCEPT

The goal of this Concept shall be the creation of highly efficient, competitive tourism industry, integrated into the system of the global tourism market.

The objectives shall be:

1) development of domestic and inbound tourism;

2) development of regional cultural and tourism clusters;

3) increasing the contribution of the tourism industry to the state economy, stimulating investment;

4) creation of jobs in the tourism industry and related sectors of economy;

5) development of entrepreneurship, including SMEs in related sectors of the economy, and human potential, in the whole country and regions, including rural areas;

6) increasing the quality of a tourism product and ensuring their competitiveness;

7) tourism development planning, including in the area of specially protected natural areas;

8) ensuring further development of tourism infrastructure;

9) promoting tourist destinations in the domestic and international markets;

10) formation of a uniform national tourist brand.

One of the ways to solve these problems will be the development of the Concept of the draft law “On amendments and additions to certain legislative acts of the Republic

of Kazakhstan on the issues of tourism activities” with its subsequent submission to the interdepartmental commission under the Government of the Republic of Kazakhstan. An instrument for implementing the specific tasks of this Concept shall be the Action Plan for the implementation of the Concept of tourism industry development of the Republic of Kazakhstan until 2023.

#### 4. MAIN PRINCIPLES AND GENERAL APPROACHES OF TOURISM INDUSTRY DEVELOPMENT IN THE REPUBLIC OF KAZAKHSTAN

##### Main tourist clusters

In the age of high international competition, tourist demand is undergoing significant dynamic changes. In this connection, new principles and approaches to the formation and promotion of the tourism product of the Republic of Kazakhstan from the side of interested structures will be developed in order to create the most effective system of tourism "experience" for domestic and international visitors.

It should be taken into account that despite the uniqueness and quality of a tourism product, the lack of a highly developed infrastructure (transport infrastructure, telecommunication channels, consumer services, etc.) reduces the degree of satisfaction with travel, which, as a result, leads to the decrease in the number of tourist arrivals and decrease in the level of competitiveness of the territory in the domestic and global tourism markets.

In this regard, new approaches will be developed in the organization of tourism at various territorial levels (countries, regions, districts, cities). One of these methods is the cluster approach.

At present, for domestic tourism, the task of forming clusters in order to increase the competitiveness of the corresponding administrative-territorial formation has become the most topical.

A tourist cluster is the concentration within one limited territory of interconnected enterprises and organizations involved in the development, production, promotion and sale of a tourism product, as well as activities related to the tourism industry and recreational services.

The purpose of creation of a tourist cluster is the increasing the competitiveness of the territory in the tourist market due to the synergistic effect, including:

- 1) improvement of the efficiency of enterprises and organizations included in the cluster;
- 2) stimulation of innovations and development of new tourist destinations.

The creation of a tourist cluster actually determines the positioning of the territory and affects the formation of a positive image of the region, which as a whole will create highly integrated tourist offers and competitive tourism products.

Taken into account the priorities of the Concept of cultural policy of the Republic of Kazakhstan, approved by the Decree of the Head of State of November 4, 2014 no. 939, in Kazakhstan it is possible to create six cultural and tourist clusters:

1. "Astana - the heart of Eurasia" – is a tourist cluster on the basis of Astana city.

Astana is the political, administrative, business and cultural center of the country. The main tourism products that will be developed in this cluster are MICE, tourism and short-term leisure.

Key elements of tourist interest in this cluster are:

- 1) objects of the international specialized exhibition "Astana EXPO-2017";
- 2) Astana-Baiterek monument;
- 3) "Astana Opera" State Opera and Ballet Theatre;
- 4) "Khan-Shatyr" Shopping and Entertaining Center;
- 5) "Ethno-memorial complex "Map of Kazakhstan "Atameken"
- 6) Hazret Sultan Mosque;
- 7) Independence Square;
- 8) National Museum of the Republic of Kazakhstan;
- 9) Park of Lovers
- 10) Triumphal Arch "Mangilik El".

The most relevant and promising of the main areas of tourism for Astana shall be congress, business, event and ethno, recreational tourism (cultural and sporting events, events, conferences, forums, etc.).

For the purposes of development of the indicated tourism trends, a number of key elements have been determined - general (availability from outside, place of accommodation, visitor's experience) and specific (venues and active attraction of events, improvement of sights, high-quality healthcare, competitive prices).

The following priority initiatives will be implemented along with it:

- 1) creation of the city's brand and marketing company;
- 2) development of city navigation;
- 3) accession to the international tourism and congress and exhibition organizations (MICE);
- 4) formation of a program of concert events in participation of event-management agencies;
- 5) involvement of international companies for the effective management of sports and cultural facilities;
- 6) creation of a training center for service workers.

2. "Almaty - the free cultural zone of Kazakhstan" shall be the cluster that includes the city of Almaty and a part of Almaty region, in which the following key places of tourist interest have been determined:

- 1) archaeological petroglyphs of Tamgaly (UNESCO site);

2) Altyn-Emel State National Natural Park, included in the preliminary list of UNESCO;

3) Charyn Canyon in the territory of Charyn State National Natural Park;

4) Lake Balkhash (south-eastern part);

5) Alakol Lake (southern part);

6) Kapchagay reservoir;

7) international tourist center "Akbulak";

8) ski areas near the city of Almaty with the Ile-Alatau State National Natural Park included in the preliminary list of UNESCO;

9) "Zhongar-Alatau" state national natural park;

10) State National Natural Park "Kulsay Kulderi";

11) balneological resort area "Kara Dala";

12) Tengri Khan peak - the highest peak of Kazakhstan.

In the future, the cluster may expand and include other parts of Almaty region, as well as provide new places of tourist interest - the mountain range of Zhetisu Alatau with the Eshkiolmes petroglyphs included in the preliminary list of UNESCO, as well as the Issyk Kurgans.

Almaty is a city with a thousand-year history, the "golden cradle" of Independence of our Motherland. Almaty is characterized by:

1) multi-vector dynamics of development;

2) wide range of possibilities;

3) versatility and fullness of energy;

4) environmental friendliness of green technology development;

5) creativity and aspiration for the future;

6) brightness and unique atmosphere of warmth and hospitality.

Almaty will become the center of international business and ski tourism and will be positioned as a cluster of "Entertainment in the city and mountains." The main tourism products that this cluster will represent include MICE tourism, cultural and environmental tourism, adventure tourism, mountain and lake recreation, short breaks, and the formation of a concert program with the participation of event-management agencies.

3. "Jewel of Altai" shall include the northern and eastern parts of the East Kazakhstan region. The city of Ust-Kamenogorsk will be the center of the cluster, in which eight key places of tourist interest are identified:

1) Berel mounds;

2) Bukhtarma reservoir;

3) Yertis River - Zaysan Lake;

4) Katon-Karagai State National Natural Park;

5) Kiin-Kerish;

- 6) Ridder city - West Altai State Nature Reserve;
- 7) Alakol Lake (northern part);
- 8) Semey city and Abay district (Zhidebay).

In the future, the cluster may expand, including the remaining parts of the East Kazakhstan region.

The “Jewel of Altai” cluster will be positioned as the “World of Natural Wonders” and will be the center for the development of ecological tourism.

The main tourism products that will be developed in this cluster include active and adventure tourism, entertainment, recreation in the mountains and lakes, pantotherapy, gastronomic, spa, SPA tourism and others.

4. "Revival of the Great Silk Road" shall include the central and eastern parts of the Kyzylorda region, the south-eastern and north-western parts of the South Kazakhstan region and the south-western part of Zhambyl region.

Key places of tourist interest shall be:

- 1) modern city of Turkestan;
- 2) Mausoleum of Khoja Ahmed Yassawi (UNESCO site);
- 3) archaeological sites of the medieval fortification of Otrar and the Otrar oasis, included in the preliminary list of UNESCO;
- 4) Sauran archaeological complex;
- 5) Karatau State Nature Reserve with Paleolithic sites and geomorphology; Arpa-Uzen petroglyphs included in UNESCO preliminary list;
- 6) Sairam-Ugam State National Nature Park;
- 7) Aksu-Zhabagly Nature Reserve;
- 8) Baikonur complex;
- 9) Kaskasu mountain resort;
- 10) Kyzylorda, Saryagash, Shardara, Taraz cities.

The central object of the cluster will be the city of Turkestan, positioning itself as a spiritual, historical, cultural and tourist center of Kazakhstan at the level of recognized international centers of pilgrimage and tourism.

In the future, the cluster may expand, including the remaining parts of all three regions, as well as provide new places of tourist interest, such as the Merke Turkic shrine, monuments of the Dzhetyasar oasis, Syganak settlement included in the preliminary list of UNESCO, the palace complex of Akyrtas (VIII-XII centuries), which is the UNESCO site.

The “Revival of the Great Silk Road” Cluster will be positioned as “The Heart of the Great Silk Road”. The main tourism products that will be developed in this cluster include spiritual, historical and cultural tourism and tours, mystical, adventure, entertaining, sanatorium-resort and spa tourism.



Within the framework of the international transport corridor “Western Europe - Western China”, a modern tourist infrastructure will be created to accommodate, rest and receive the necessary services by tourists, with reference to the unique tourism facilities of the regions and relevant conditions at the western and eastern “border gates” of the republic.

The comprehensive implementation of this Concept is able to transfer the economy of the city of Turkestan to a new competitive state by developing a tourist-service type of specialization. Therewith, conditions will be created for the formation of a service-innovative economy, where the tourism sector, based on the use of information and communication technologies (ICT), will play a dominant role.

5. "Caspian Gates" shall include the entire Mangistau region and a part of West Kazakhstan and Atyrau regions. The city of Aktau will be the center of the cluster, in which the following key places of tourist interest are located:

1) underground mosques Beket-Ata, Shopan-Ata and Karaman-Ata, the mausoleum of Omar and Tur;

2) Sherkala mountain;

3) Karakiya- Karakol State Nature Reserve;

4) complex of monuments "Bukeevskaya Horde";

5) Saraishik ancient settlement;

6) Kenderli resort area.

The main tourism products that will be developed in this cluster include beach, historical, mystical, industrial, cultural tourism and tours.

6. "The Unity of Nature and Nomadic Culture" shall include Akmola and Karaganda regions, the southwestern part of North Kazakhstan and the western part of Pavlodar regions. Shchuchinsko-Borovsk resort area will be the center of the cluster, in which the following key places of tourist interest are located:

1) Kokshetau State National Nature Park;

2) Burabay State National Nature Park;

3) Buiratau State National Nature Park;

4) Karaganda city;

5) Karkaraly State National Nature Park;

6) Bayanaul State National Nature Park;

7) Ulytau State Nature Reserve (zoological);

8) Ulytau National Historical, Cultural and Natural Museum-Reserve;

9) Imantau-Shalkar resort area, including monuments of Botai culture of the Eneolithic Period;

10) Zerendy resort area;

11) Northern Balkhash region;

12) Kyzylarai State Nature Reserve.

In the future, the cluster may be supplemented with new places of tourist interest included in the preliminary list of UNESCO: megalithic mausoleums of the Begazy-Dandybaevskaya and Tasmolinskaya cultures.

The cluster will become the center of nomadic culture and steppe diversity. The main tourism products that will be developed in this cluster are cultural tourism and tours, entertainment, adventure, recreation in the mountains and lakes, sanatorium-resort and spa tourism, as well as short-term and active rest.

The first priority clusters shall be "Astana - the Heart of Eurasia" and "Almaty - free cultural zone of Kazakhstan" clusters.

The second priority clusters shall include all other clusters.

Attraction of strategic (anchor) investors

Kazakhstan is at the dawn of a new stage of socio-economic modernization. One of the most important tasks of the state for the next decade is the implementation of the Strategy of accession of Kazakhstan to the number of 30 most competitive countries in the world.

To solve these problems, the creation of an innovative economy and the development of the non-resource sector play a decisive role.

Today, more and more countries see the economic attractiveness of tourism development, expressed in increasing tax revenues, increasing the number of jobs, improving living standards and attracting investment.

In this regard, in order to implement the 57th step of the Nation Plan "100 concrete steps" to implement the 5 institutional reforms of the Head of State, as well as to stimulate the flow of both external and internal investments in the tourism industry, three anchor projects are being implemented:

1) construction of the Akbulak international tourist center, Almaty region (Talgar region), the investor is Steppe Capital JSC;

2) "Mount Sinai" medical center in Almaty city, the investor is "Capital Partners" JSC;

3) development of the Kenderli resort recreation area in the Mangistau region.

In the field of attracting investment in the tourism industry, the following measures will be taken jointly with the Ministry of Investment and Development, JSC "NC" "Kazakh Invest" and JSC "Export Insurance Company "Kazakh Export":

1) continuation of work to attract strategic (anchor) investors with successful experience in creating tourist clusters;

2) development of basic approaches to attract investment in the development of tourist clusters;

3) inclusion of the tourism industry in the list of priority activities for the implementation of investment priority projects;

4) creation and maintenance of a database of investment projects in the field of tourism;

5) development of PPP forms together with the business community for financing and investing in tourist areas, as well as adjacent territories for placement of service facilities;

6) supporting the private business initiatives and investment projects through the introduction of long-term financing mechanisms;

7) adoption of a joint action plan to attract foreign investment for the development of six tourist destinations;

8) addressing the issue of lending to tourist projects for a period of 10, 15, 25 years ;

9) work with foreign donors to develop the tourism industry in Kazakhstan ( assistance programs of the EU, USA, UN, OSCE, international financial institutions, as well as China, the Russian Federation, India, Iran, etc..).

10) elaboration of “guides” for development of tourism business in Kazakhstan;

11) elaboration of system, short-term and long-term forms of state investments to the tourism industry of Kazakhstan.

Main types of tourism

Cultural and educational and ethnographical tourism

Kazakhstan is a country with a rich historical and cultural heritage. Located in the center of Eurasia, Kazakhstan was at the crossroads of the most ancient civilizations of the world, the intersection of transport arteries, social and economic, cultural and ideological ties between the West and the East, South and North. In ancient times, the Great Silk Road passed through the steppes of Kazakhstan. In various periods of history in the territory of present Kazakhstan, states with a distinctive cultural history emerged and developed.

The legacy of that period is numerous historical and cultural monuments, geographical attractions.

Cultural leisure, like all other forms of entertainment and recreation, does not stand still. It acquires new functions, expands and rationalizes, outlining all the great boundaries of its content. A special role in this process is played by the creation of leisure and recreation centers that meet international standards, environmental and ethno-parks, various cultural, natural and historical reserves.

In addition to natural attractions, Kazakhstan is rich in historical and cultural monuments located on the Great Silk Road, which have worldwide significance. The organization of transit tours on the Great Silk Road is especially relevant, as this will give Kazakhstan the opportunity to enter the zone of interest of countries such as Japan , Malaysia, China, Korea, as well as European states. The Great Silk Road is one of the priority directions of tourism development in Kazakhstan.

The global experience shows the special role of cultural and educational tourism as an effective tool to popularize the culture of your country abroad. Attracting foreign tourists is also an important condition for the intensive development of the creative industry.

Nowadays, when most people live in multinational megalopolises and cities, ethnographic tourism acquires particular relevance and popularity, in which one gets acquainted with the customs, traditions, rites, architecture, folk costumes and holidays, the culture and language of one or another ethnographic group of population.

Ethnographic tourism will contribute to strengthening family relations, spiritual and moral education of youth, preservation of cultural and development of family values.

#### Sacred or spiritual tourism

According to the article of the Head of State dated April 12, 2017, “The Course towards Future: Modernization of Public Conscience”, work will begin on the implementation of the project “Sacred Geography of Kazakhstan”.

The project “Sacred Geography of Kazakhstan” – is a set of measures on formation of cultural and geographical zones of shrines of Kazakhstan, being the framework of the national identity.

The strategic core of the project “Sacred Geography of Kazakhstan” is the idea put forward by the Head of State to strengthen national identity. One of the key priorities is the formation and promotion of national Kazakhstan patriotism.

Kazakhstan faces a number of global challenges, many of which can be overcome through the preservation and strengthening of its culture, its own national code. In such conditions, the need to promote own national symbols, the fast and constructive organization of competitive educational, informational and tourist strategies, including through the development of domestic tourism, comes to the forefront.

Over the years of Independence, a number of major programs have been implemented: since 2004, the “Medeni Mura” program aimed at restoring historical and cultural monuments and objects in Kazakhstan has been implemented; Since 2013, the "Khalyk Tarikh Tolkynynda" Program has been implemented, systematically collecting and studying documents from leading world archives on the history of Kazakhstan.

A large-scale inventory of domestic historical and cultural monuments was carried out, state lists of historical and cultural monuments of “macro-sacred” and “micro-sacred” significance were approved.

The best samples of folk arts were systematized within the frameworks of unique projects "Kazakhstan dasturli myn kuyi", "Kazaktyn dasturli myn aeni" and "Batyrlar zhyry".

The cultural monuments - the mausoleum of Khoja Ahmed Yassauy and petroglyphs of the archaeological landscape of Tamgaly, as well as the natural heritage

site “Saryarka - steppes and lakes of Northern Kazakhstan” were included into the UNESCO World Heritage List. Eight Kazakhstan sites of the Semirechensky section of the Silk Road: Talgar, Koylyk, Karamergen, Aktobe Stepninskoye, Ornek, Kulan, Kostobe, the Akyrtas archaeological complex were included in the UNESCO World Heritage List as part of the serial transnational nomination “Silk Road: route network of Chanan-Tien Shan corridor”.

Implementation of the project "Sacred Geography of Kazakhstan" will be based on the following principles:

- 1) strategic importance of modernization of the public consciousness;
- 2) preservation of own culture, own national code;
- 3) the priority of the national cultural heritage that determines the identity of national culture in the global world;

4) competitiveness, pragmatism, a cult of knowledge and an open mind;

In the field of sacred tourism, the following measures will be taken:

- 1) detailed classification of sacred objects has been carried out;
- 2) a virtual map of cultural and tourist attractiveness of Kazakhstan ”and placed in the search engine“ Google ” has been created;

3) a map of localization of historical and cultural sites, as well as places of universal pilgrimage in Kazakhstan has been created with the necessary materials ( historical facts, legends, myths);

- 4) encyclopedia "The Sacred Kazakhstan" has been published;
- 5) series of books "The Sacred Monuments of Regions" have been published;
- 6) The National Atlas of the Republic of Kazakhstan has been published;
- 7) series of popular science films about sacred objects of Kazakhstan with subtitles and dubbing in six UN languages have been created;

8) new subjects studying the sacred geography of Kazakhstan have been developed and introduced into the educational process;

9) relevant mobile apps have been created;

10) several visit-centers in the sacred sites of Kazakhstan have been put in operation;

11) works on restoration of objects, as well as works on development of infrastructure to sacred objects have been conducted.

The remaining key measures for the development of domestic tourism within the framework of the formation of the “Sacred Zones of Kazakhstan” will be provided for in the Action Plan for the implementation of the Concept of tourism industry development of the Republic of Kazakhstan until 2023.

Social Tourism

One of the priority areas of activity for all regions is the development of social tourism, which provides opportunities to meet the needs for tourist services within the country of certain categories of the population.

The 1980 Manila Declaration on World Tourism proclaims social tourism as the goal towards which society should strive for the benefit of less affluent citizens when using their right to vacation.

The international organization for social tourism defines this type of tourism as relations and phenomena associated with the participation of people in destination countries, which are low-income, who cannot afford to be involved in tourism. This participation is made possible or facilitated by a combination of policies, clear social measures and the commitment of social players.

This wording implies not only direct support to target groups of people, but also the formation of affordable tourism infrastructure, which is especially important for the development of domestic tourism in Kazakhstan.

target groups of social tourism (including veterans, people with disabilities) are practically not involved in tourism processes. Their needs and potential for the tourism industry have not been investigated. The subjects of the tourism business practically do not have information about the specifics of servicing the target groups of social tourism and, accordingly, the volume and quality of the services they provide are at a low level. The country has an insufficient number of accessible tourist facilities, accessible tourist transport. The work on the issues of social tourism among tourism industry entities is not coordinated.

The following measures will be taken in the field of social tourism:

- 1) strengthening the functions of social tourism in all entities of the tourism industry;
- 2) in all tourism projects, as a prerequisite, accessibility for people with limited mobility will be provided according to standards;
- 3) development and promotion of available tourist routes in every region of the country and creation of a register of available routes;
- 4) monitoring and analysis of existing Kazakhstan websites for tourists with the development of recommendations for their adaptation for tourists from mobility groups ;
- 5) exchange of experience on involvement of new organizations into the field of social tourism.

Youth tourism

The development of youth tourism will be carried out comprehensively in conjunction with all interested bodies and akimats through:

1) determining the strategic directions for creating an open informational, educational, social space for youth tourism, teaching skills in labor, social activities, search and research, professional orientation, social adaptation;

2) creating the conditions for development of youth tourism, regional study and excursion work;

3) renovation of the content of tourism and local history events in the context of cultural-educational and socio-pedagogical design and the competency-based model of the educational process.

Youth tourism being an active type of tourism promotes:

1) introducing the younger generation to a healthy lifestyle;

2) education of the will and spirituality;

3) practical development of knowledge of the native land, familiarity with the surrounding nature, historical and cultural monuments.

Engaging in various types of tourism from childhood allows you to cultivate a sense of citizenship, tourist culture and develops the ability to perceive the ideology of hospitality as a national idea, through the implementation of which real development of tourism is possible as an effective sector of the economy, ensuring sustainable development of the state with minimal consequences for nature and society.

In the field of youth tourism, the following measures will be implemented:

1) development of educational programs, advance training courses for teachers of additional education in tourist technology and orienteering;

2) improvement of normative regulation of the youth regulation in the Republic of Kazakhstan;

3) development of tourist routes for schoolchildren and students during holidays;

4) development of methodical recommendations;

- on the organization of tourism and local history work in organizations of additional and secondary education;

- on the organization of activities of an instructor of youth and school tourism;

- on the organization of activities of youth and youth tourist camps, agro-tourism facilities;

- on the judging school tourism competitions;

- on the storage of tourist equipment and gear;

5) development of standards for passing the hiking and orienteering;

6) opening of youth tourist bases and student tourist clubs in higher educational institutions;

7) detection and dissemination of best practices;

8) conducting vocational guidance work in the field of tourist management among students;

9) conducting republican events on youth tourism, the annual republican winter and summer sports and athletic meetings for tourist multidiscipline competition;

10) organization of the republican expedition "Menin Otanym - Kazakhstan".

#### Sports Tourism

In view of the increasing interest of people in sports, special attention will be paid to the development of sports tourism, which is the holding of mass events at the international level: olympiads, tournaments, festivals and others. Kazakhstan has experience in organizing and conducting such events (7th Asian Winter Games, 28th World Winter Universiade) and the corresponding material and technical base.

Holding such major sports events not only strengthens the country's image in the international arena as an open and hospitable state, but also creates a stimulus for the development of tourism infrastructure, which will serve for many years, attracting new tourist flows to the region.

#### Medical Tourism

According to estimates by the World Health Organization (WHO), by 2022, tourism and healthcare will jointly become one of the mainstream global industries. Over the past 12 years in the world, the volume of income in the medical tourism sector has increased more than 17 times - from 40 billion to 700 billion US share. Medical tourism accounts for about 16% of total tourism revenue, and world medical tourism centers are currently shifting to countries of the Asia-Pacific region.

According to the data of Global Spa & Wellness Summit (GSWS) by 2017, 50% of the medical tourism market will be in Asia, Latin America and the Middle East.

In Kazakhstan, the potential of medical tourism (both internal and external), in particular, for complex treatment, is available mainly in Astana. The number of foreign patients is growing, the number of which for 12 months of 2016 in the country exceeded 10 thousand, mainly from the countries of the Commonwealth of Independent States. Therefore, Kazakhstan is gradually becoming part of the global medical tourism industry.

For the development of medical tourism and the introduction of international standards for diagnosis and treatment, at the initiative of the Head of State in Astana, the National Medical Holding JSC was established, transformed into the Corporate fund "University Medical Center", the main mission of which is to provide a high level of medical care, taking into account synergies research, educational and clinical activities.

In several cardiology clinics of the capital (National Scientific Cardiac Surgery Center, National Scientific Medical Center, Hospital of the Presidential Administration, 2nd City Hospital), more than 30 thousand complex and unique heart operations were performed, including about 40 cardiac transplantations and 5 lung transplantations.



The National Center for Neurosurgery is the only specialized clinic in Kazakhstan that provides a full range of medical services for neurosurgical pathology, from diagnosis to early rehabilitation of patients using cutting edge medical technologies aimed at maximum efficiency and safety for the patient. The center is equipped with the latest medical equipment, which has no analogues in the republic. This equipment allows minimally invasive neurosurgery to be performed with maximum accuracy and safety for the patient.

In the field of medical tourism, the availability of medical services in six tourist clusters (“Astana - the heart of Eurasia”; “Almaty - the free resort area of Kazakhstan”; “Jewel of Altai”; “Revival of the Great Silk Road”; “Caspian Gate”; “Unity of Nature and Nomadic Culture” will be ensured).

#### Business Tourism (MICE - Tourism)

Business tourism (MICE - tourism) – is relating to the type of organized travel related to business motives: business meetings, incentive tours, conferences, exhibitions, events, working group meetings, seminars and leisure during business trips

#### Coastal Tourism

In our country, the coastal tourism is characterized by a short season, lack of necessary infrastructure, however, this type of tourism should not be excluded from the list of attractive ones.

The coastal tourism means staying in coastal areas for recreation purposes and for rest, as well as water sports, boating and yachting (sea vacations). The main countries generating tourist arrivals to Kazakhstan for this tourism product include Kazakhstan, the Russian Federation.

In order to develop beach tourism in the Republic of Kazakhstan, a number of measures will be developed, including measures on supporting entrepreneurial activity in cases of emergency.

#### Agritourism

Agritourism is a relatively new and promising area, involving the formation and provision of comprehensive services to visitors for accommodation, recreation, food, excursion services, leisure and sports events, fishing and hunting, the acquisition of knowledge and skills, as well as the possibility of engaging in active tourism in rural areas.

Attractive features of agritourism are clean air, a homely atmosphere, primary nature, natural products, silence and leisurely living. This is a powerful tool for protecting the environment, contributing to the involvement of the local population, for which a careful attitude to nature will become economically viable.

In this regard, it is advisable to determine the mechanisms for the establishment and development of SMEs of the regions involved in agritourism, to formulate

teaching aids, to provide advisory assistance to entrepreneurs opening guest houses, to identify effective tools for information support and promotion of guest houses at the local level.

In the area of agritourism (rural tourism) the following measures will be taken:

1) introduction of the conceptual framework of agritourism, incl. concepts of rural tourism ("Agritourism");

2) popularization and promulgation of "Agritourism" (rural tourism);

3) development by the LEB of agritourism facilities in rural areas: guest houses, specialized private hotels in the form of stylized "agritourism villages", "fishing and hunting villages", etc.

#### Hunting and Fishing Tourism

Hunting tourism is a world-recognized mechanism for attracting finance for the conservation of wildlife, which dramatically changes the attitude of the local population and local bodies to the conservation of wild animals and their habitats.

According to various expert evaluations, in Kazakhstan, the costs of protecting rare and endangered species can be fully covered at the expenses of the development of hunting tourism.

World practice has shown that a scientifically based limit on the removal of old males does not have a depressing effect on the population, and in some cases only increases its productivity. For some states, it was the only way to preserve rare species of animals. For example, females of some species of the cavicornians family remain dry when the old male does not allow males younger to participate in the estrus, and he is not able to leap all females.

In Kazakhstan, the current situation of the populations of many rare species has stabilized and we can talk about the sustainable use of old individuals for hunting purposes. Perhaps the Red Book Regulation should be revised with regard to replacing complete bans with scientifically based seizures.

The analysis of development of hunting tourism in the world shows that this is a dynamically developing industry. As an example, we can cite the data on the United States of America (significant in connection with the developed financial accounting system). Americans spend \$ 22 billion annually on hunting, and the total multiplier effect of hunting is \$ 61 billion. The US hunting farms create more than 700 thousand jobs and provide earnings of more than 16 billion US dollars per year.

In the late 60s in Europe, this type of outdoor activity began to sharply gain popularity and is currently most developed in Spain, Hungary and some other countries

Hunting tourism has invaluable economic value for some developing countries in Africa, where, along with other forms of tourism, it is one of the sources of foreign exchange. Safari in Africa is by far the most well known hunting tourism product for

the general consumer. For example, about 8,000 hunters visit the Republic of South Africa annually, and the total revenue from this industry is \$ 100 million per year.

Our country is extremely rich in wildlife, traditionally hunted.

In general, it can be stated that the presence of a diverse fauna with a developed hunting infrastructure attracts significant funds to the country, helps to preserve nature, and at the same time contributes to the development of regions:

- 1) the state receives funds through the sale of the right to hunt in general and the issuance of licenses to shoot certain species of animals;
- 2) private hunting farms receive funds from hunters through the organization of hunting;
- 3) local representatives make a profit by arranging accommodation, meals, transporting hunters, selling souvenirs, making hunting trophies.

The created infrastructure of hunting tourism will provide an opportunity for the development of ecological tourism in these areas, providing the local population with an extra incentive to conserve wildlife.

For the purposes of development of fishing tourism, it is planned to introduce an all year round license for fishing based on the principle "catch and release".

The capabilities of Kazakhstan are represented by the opportunity of lake and river fishing in numerous reservoirs, and in these conditions, fishing tourism in the country is developing very quickly and everywhere. The country has the Federation of Sports Fishing. The Kazakhstan team is one of the strongest in the world. Spearfishing is also rapidly developing. More and more tourist sites include fishing in the list of services offered.

The experience of the sanatorium resort "Rakhmanovsky keys" in the East Kazakhstan region is illustrative. After a corresponding study of aquaculture, some species of fish were brought to the lake, which was considered "dead", which allowed increasing already great flow of tourists to this resort and sanatorium.

In the field of hunting tourism the following measures will be taken:

1) review of approaches to shooting certain animal species from the Red Book of Kazakhstan;

2) the study of the organization of auctions for the shooting of certain rare species of animals. For example, in the Islamic Republic of Iran, marhurs (goat-horned goat) were almost hunted to extinction by the British, and then by local hunters. The Government of the Islamic Republic of Iran has allocated several licenses for marhur, which were sold at the US auctions. The total amount of funds received from the sale of five licenses amounted to about \$ 300,000, which was spent on the work to restore the number of marhurs. At their expense, special environmental units were created in the Islamic Republic of Iran, equipped with modern equipment - walkie-talkies, vehicles, weapons and with good wages for its employees;

3) creation of conditions for the development of natural and hunting tourism. First of all, it relates to the promotion of artificial breeding of wild endangered and rare species of animals, the regime of entry and hunting of visiting hunters.

In the field of popularization of hunting and fishing tourism:

1) creating a dialogue platform for fans of extreme recreation (hunting, fishing) via Facebook or other popular Internet resources with the involvement of a foreign audience;

2) study of the issue of creating a series of documentaries on biological diversity and hunting enterprises of the Republic of Kazakhstan and showing them on central domestic television channels, as well as broadcasting on popular foreign channels (National Geographic, BBC, etc.).

Camping Tourism, Autotourism and Caravanning

Autotourism and caravanning are the most up-to-date, mobile and available types of tourism. For the purposes of temporary accommodation of campers and caravaners, campsites (outdoor areas equipped for tourist transport), parking in ethno-villages, recreation areas, hotels, guest houses, roadside services, and any protected area in nature are used.

According to the European Federation of Camping site Organizations and Holiday Park Associations, the camping tourism and caravanning sector each year, on average, accounts for about 25% of all campers in Europe. This sector provides 10.8 million bed places for tourists and is the largest tourist network in Europe, being ahead of the traditional hotel business with 8.7 million beds. The total number of campsites in Europe is about 25 thousand.

In aggregate, the total annual turnover of the caravanning industry in Germany is about 10 billion euros, about 170 thousand people are employed in this industry, and its profit is estimated at 4.1 billion euros. The total turnover of the tourism industry in the Federal Republic of Germany is 140.6 billion euros or 8% of the country's GDP.

In the People's Republic of China, a tourism development program has been adopted for the current five-year period as the main driver for the transformation and modernization of the economy of the People's Republic of China, caravanning and camping tourism are a part of this tourism development program. According to the forecast, by 2020 in the People's Republic of China the number of campsites will increase to 10 thousand. Yet today there is a large number of campsites (about 500), especially in the southern part, and their number is growing annually. The People's Republic of China has its own companies producing motorhomes and caravans, and annually international caravanning exhibitions are held in the country, attracting many local and foreign visitors. Analysts believe that in the future trailer tourism will become one of the most popular types of tourism in the People's Republic of China.

Camping tourism, autotourism and caravanning are developing rapidly in the neighboring Russian Federation. Moreover, if earlier Russian autotourists and caravaners preferred traveling over Europe for autotourism purposes, then in the light of recent political events, Russian autotourists and caravaners are happy to travel along the routes of the Silk Road. Caravanning is almost all-season. Other interests are easily combined with traveling on wheels: local history and regional studies, history, sports, photography. Caravanning allows the tourist to feel complete harmony with nature, while not depriving him of the comfort and amenities of civilization.

In the field of camping tourism, autotourism and caravanning, a number of regulatory requirements will be adopted regarding:

- 1) relevant traffic signs in the traffic regulations (hereinafter referred to as the traffic regulations);
- 2) determining the procedure for inspection of tourist vehicles by the traffic police for compliance with traffic regulations;
- 3) determining the procedure for passing technical inspection of tourist vehicles;
- 4) establishing the standards for tourist vehicles.

For the development of camping tourism in accordance with international requirements,

- 1) Standards for opening campsites and parking lots;
- 2) standards for equipment for electric power and water supply of tourist vehicles will be adopted.

#### Gastronomic tourism

Gastronomic tourism is a new and promising type of tourism, the main purpose of which is to get acquainted with a country through the prism of national culinary. Gastronomic tourism is one of the fastest growing in the CIS countries. Kazakhstan has the potential to develop gastronomic tourism. The history of culinary (gastronomy) of Kazakhstan is inextricably linked with the history of development and formation of Kazakhstan society as a whole.

Primarily, the historic background of domestic culinary art takes its roots in the culture and life of nomadic civilizations, in this connection, the basis of Kazakh national cuisine is the skillful preparation of meat dishes from the meat of various animal species, capable of long-term journeys. In this regard, the Kazakh national cuisine has acquired a special art and specificity in the preparation of delicious dishes from a seemingly limited range of products due to the life of nomads. As a result, national Kazakh cooking brands emerged: Kazakh-style meat, horse meat delicacies - kazy and zhaya, boiled or baked carcasses of lamb, cheese, unique milk drinks koumiss and shubat, fermented milk products kurt and irimshik, dough products - nan, bauyrsak and much more.

The historical community with the ancient civilizations of the neighbors brought the color of oriental settled cultures in the form of pilaf, manti, lagman and other numerous Central Asian dishes. The formation of the Great Silk Road and the cuisines of the peoples who inhabited it, including the Uyghur and Dungan peoples, had a certain influence on the formation of national cuisine.

The 19th and 20th centuries, the history of relations with the Russian Federation, peoples living in the territory of the former Soviet Union had a tremendous impact on the multinational character of the formation of Kazakhstani cuisine. Multinational Kazakhstan has become a home for representatives of more than 130 ethnic groups, each of which has its own special, national cuisine. As a result, local cuisine was enriched by a huge variety of cuisines of all nationalities of the post-Soviet space. Borshch, dumplings, Russian salad, Caucasian shashlik and much more firmly entered the daily diet of Kazakhstan people.

As a result of the last decades of globalization of the global economy, Kazakhstani restaurant has adopted the best trends in world culinary: Italian cuisine, European cuisine, fast food and Pan-Asian cuisine. Thus, Kazakhstan is a unique gastronomic project, the feature of which is the interweaving of the historical and cultural culinary past with the preservation of a bold national presence.

Another culinary feature of Kazakhstan is that dishes are prepared from environmentally friendly products without the use of genetically modified organisms (hereinafter referred to as the GMOs) and preservatives. Dishes of different nations, prepared from environmentally friendly products without GMOs and preservatives, will increase interest in inbound tourism. The following events will be held to develop gastronomic tourism:

1) intensified work with entrepreneurs in the restaurant business, as well as related areas of activity to identify levers that contribute to the effective work of local government support tools. Measures to promote gastronomic tourism will include economic incentives for SMEs.

2) thematic gastronomic tours in tourist clusters is developed;

3) holding gastronomic festivals - food shows, master classes, during which tourists will have the opportunity to participate in the preparation of dishes, is organized.

#### Personnel Training for Tourism Industry

Nowadays personnel training for the tourism industry in organizations of higher and postgraduate education is carried out by 47 higher educational institutions on specialties “Tourism”, “Regional Studies” - 12 universities and 45 universities - “Translation Studies”.

A personnel training for the tourism industry, in the system of technical and vocational education is carried out in 41 educational institutions of technical and vocational education.

At the same time, graduates are trained in isolation from today's realities. In this regard, the State Compulsory Education Standard (GOSO) in the field of tourism will be reviewed and the issue of extending the certification of the UNWTO (World Tourism Organization) through the TedQual system to all higher education institutions teaching the specialty "Tourism" will be considered, which should lead to the active introduction of dual education in tourism.

Kazakh National University named after al-Farabi has successfully passed this certification.

TedQual (Tourism Education Quality) - voluntary certification of higher education institutions in the specialty "Tourism", aimed at the continuous improvement of the quality of education. The certification analyzes and evaluates the 5 components of the education system that affect the internal and external aspects of the curriculum, including the relevance of curriculum content to the current needs of the tourism industry.

It is important to establish at the National Tourism Office a Center for the short-term training of guides and guides who speak English, French, Chinese, Turkish and other languages. At the same time, in order to develop social tourism, it is planned to provide for the training of guides and guides for people with disabilities (elderly people, people with visual impairment, hearing impairment, impairment of musculoskeletal system, etc.).

Also, for the purposes of increasing the number of scientists in the field of tourism, work will be carried out to consider the issue of increasing the state order for the PhD specialty in tourism (today the state order is 3-4 places per year).

Along with this, it is topical today to return of specialty "Management in the field of tourism" (without the hotel and restaurant business) to the list of priority study abroad programs as part of the Bolashak International Scholarship of the President of the Republic of Kazakhstan.

In the field of specially protected natural territories and forestry management the following measures will be taken:

- 1) coordination of master plans for specially protected natural areas with the authorized tourism authority, which can make suggestions when adjusting master plans for tourism development, while identifying balneological projects for improving the population and facilities for ecological tourism as priority for implementation in specially protected natural areas;

- 2) In order to simplify the procedures for granting land plots of state national nature parks for long-term and short-term use, the issues of issuing by the authorized body in the field of specially protected natural territories permission to use these sites for construction projects and approval of a draft design by it will be considered;

3) Together with the authorized body in the field of forestry management and animal world, as well as with administrations of specially protected natural territories, ecotrails and routes will be equipped taking into account the needs of people with limited mobility, which will make them more accessible and safe;

4) Together with the authorized body in the field of forestry management and animal world, conditions will be created for fair competition among bidders, openness and transparency of the process of issuing permits for the use of state national parks for construction sites by simplifying existing mechanisms.

In the field of land relations, the issue of construction of seasonal buildings and light architectural forms (coastal cafes) on the land plots of water protection bands without using heavy construction materials has been considered.

In the field of simplifying the procedures of migration control and visa processing, the following measures will be implemented:

1) continuation of work on simplification of a procedure for issuing Kazakhstan visas to ensure the tourists flow into the country;

2) consideration of the issue of opening in pilot mode the visa center of Kazakhstan abroad;

3) study of the issue of determining the procedure for paying fines by foreign citizens and stateless persons both in the Republic of Kazakhstan and abroad in electronic form;

4) consideration of the issue of simplifying the process of registration and record keeping of foreign citizens, including through the introduction of new technologies.

In the field of aviation space, measures aimed at creating competitive conditions for the development of the domestic air transportation market will be supported, including the further development of subsidizing domestic flights.

In the field of gambling, it is planned to expand the list of permitted gambling zones, as well as to work out the issue of amending the current legislation of the Republic of Kazakhstan in the field of gambling in terms of the location of gambling establishments and determining the target audience.

In order to improve the legislation of the Republic of Kazakhstan in the field of outbound tourism, it is planned to amend some of the legislative acts of the Republic of Kazakhstan on issues of insurance and insurance activities.

As an alternative to legal liability insurance of market entities (hereinafter referred to as the LLI), it is proposed to introduce compulsory insurance by the tour operator of each tourist traveling abroad, which is a world practice. These amendments will increase the interest of outbound tourism tour operators in avoiding an insured event and preventing risks. At the same time, the travel agent will be completely exempted from the insurance by the bill since the travel product is fully formed by the tour operator.



Also, the bill will determine the events recognized as an insured event, and the types of expenses to be reimbursed.

Kazakhstan has great tourism potential to attract foreign tourists, but almost 90% of domestic tour operators works in outbound tourism.

In order to stimulate tour operators on the development of inbound and domestic tourism, the issue of canceling the existence of a LLI insurance contract for the implementation of tour operator activities on inbound and domestic tourism within the framework of the bill will be worked out.

In the field of standardization it is planned:

- 1) together with interested authorized state bodies to conduct monitoring and analysis of existing regulatory documents on standardization and regulatory legal acts in the field of tourism;
- 2) to prepare necessary normative and technical basis in the field of tourism;
- 3) to work out the issue of introducing standards for tourist services.

#### EXPO-2017

The EXPO International Specialized Exhibition is the largest international event, which is a symbol of industrialization and an open platform for demonstrating technical and technological achievements..

During the exhibition period, the forecasted flow of tourists will create additional demand for 10,000 beds. As of December 2016, in the city of Astana there are 164 hotels with 12,482 beds, as well as 25 hostels with 664 beds. By EXPO-2017 it is planned to put into operation 23 hotel facilities for 2,829 beds.

In total, by May 2017, 34,739 beds will be commissioned in Astana, including through rented apartments and student hostels.

The efforts associated with the organization of EXPO-2017 will be aimed at creating the missing tourist infrastructure, making “soft” changes and solving the main problems related to increasing the competitiveness of the tourism product of Kazakhstan: simplifying entry formalities, creating tourism and transport infrastructure , organizing vocational training and developing human resources for the tourism sector, the ability to provide attractive prices and an effective destination management model, etc..

In order to ensure a comfortable stay for the guests of the exhibition, familiarization with the natural, cultural, architectural sights of the country, the main tourist routes from Astana were identified along 6 national clusters of the Republic of Kazakhstan with a mandatory visit to the EXPO-2017 exhibition.

#### Infrastructure

#### Transport Infrastructure

The number of incoming visitors to Kazakhstan in 2015 amounted to 6.4 million people. This indicator has been growing steadily over 5 years by an average of 10%. In

2015, 3.8 million people were served by locations, of which 692,250 were non-residents. This indicator increased by 18.1% compared to 2013. In addition, outbound tourism indicators are also steadily growing and exceed inbound tourism indicators. Thus, in 2015, the number of outbound tourists amounted to 11.3 million people..

Despite the rich tourist and recreational potential, the share of tourism in gross domestic product is about 0.9%.

The successful development of the tourism industry is determined by the presence of a high-quality and well-developed transport system that connects places of tourist interest inside and outside the cluster.

#### Air Transport

Air transport plays a crucial role in the development of the tourism industry in view of the fact that it will be the main mode of transport for inbound tourism.

In this direction, the issue of providing more affordable prices for air transportation will be considered in order to increase the occupancy rate of flights on existing air routes. Along with this, new air routes will be developed.

#### Railway Transport

Railway transport plays an important role in the functioning and development of the country's commodity market and in satisfying the travel needs of tourists and the public. The main role of railways is determined by the large transportation distances from the main clusters to tourist centers.

Compared to other types of passenger transport, railway transport has a number of advantages, of which the most important are:

1) regularity of transportation notwithstanding the season of the year, day and weather;

2) low cost of transportation compared to the cost of transportation by other means of transport.

In this direction, measures will be considered to expand routes, including the opening of international communication with countries near and far abroad by using new (high-speed) trains.

#### Internal Transport

For the purposes of development of internal transport, the following activities will be performed:

1) opening of tourist bus routes for sightseeing tours in the cities of Astana, Almaty and Shymkent;

2) determining and implementing the quality standards for local taxi services, taking into account the provision of stops with signs for taxis, new cars marked with

taxi signs, as well as the quality and price of taxi rides in mainly cities in Astana, Ust-Kamenogorsk, Shymkent and Aktau, as well as in all key places of tourist interest clusters in which taxi services are available or required;

3) considering the issue of introduction of seasonal bus routes to regional tourist sites.

#### "Soft" Infrastructure

"Soft" infrastructure includes low cost but critical projects and events, which increase the competitiveness of tourist destination, including provision of high quality information to tourists and investors, high level of education and training of specialists in the field of tourism and hospitality.

Projects and events, related to information environment, shall include, but not limited to as follows:

1) organization of work of LEB visit centers providing free tourist information, the possibility of booking, purchasing souvenirs, books and cards, especially at airports, railway stations, central bus stations, as well as along highways;

2) tourist signs in the main places of tourist attractions, hotels and other accommodations, airports, at railway stations, central bus stations, in ports, as well as other places of tourist interest;

3) guaranteed programs - cultural, sightseeing and other programs offered by the tourist destination;

4) destination cards offering a package of tourist attractions, services and destination products;

5) monitoring demand for destinations (e.g., customer satisfaction), offers (e.g., hotel services), competitors, products, etc.;

6) partnership among stakeholders involved in the development of hotels and other accommodations, restaurants, tourist attractions, tour operators, airlines, local executive bodies, universities, the media, etc.;

7) formation of a positive attitude of the local population towards tourists through seminars, information brochures and other events that demonstrate positive results from the development of tourism;

8) attracting both local and foreign investors in the development of the tourism industry of the Republic of Kazakhstan.

#### Institutional Transformations

The authorized body in the field of tourism is the state body responsible for the formation and implementation of state policy in the field of tourism, the implementation of state control over compliance with the legislation of the Republic of Kazakhstan on tourism.

To ensure efficient work in the areas and development of six tourist clusters in the regions, the following work will be carried out by the authorized body in the field of tourism in cooperation with LEB:

- 1) supporting and facilitating the promotion and implementation of the tourism product, projects at the regional level;
- 2) Destination promotion, including brand building and image building;
- 3) coordination and management of tourist destinations;
- 4) coordination of the annual operational and marketing plans for the promotion of tourism with the authorized body in the field of tourism.

To fulfill the tasks set by this Concept, existing institutional structures will be strengthened, and the possibility of strengthening the system of their interaction, taking into account the development of the tourism industry and the industry as a whole, will be considered.

For the purposes of efficient promotion of the country's image and attract a large flow of tourists, a large-scale marketing and advertising campaign will be carried out both abroad and within the country.

If we follow international practice, an analysis of the managerial model of tourism in the leading countries of the world shows that for the successful development of the industry it is necessary to have a more flexible separate structure in addition to the central and local authorized bodies, which focuses on marketing, works closely with business, quickly responding to new challenges and changes in world market conditions.

International experience proves the high efficiency of the so-called Destination marketing organizations - professional "organizations for managing and marketing destinations" (hereinafter referred to as the DMO) at both regional and national levels.

Thus, the central role in promoting the Italian Republic in foreign markets belongs to the Italian National Tourism Board ("ENIT"). The main functions of ENIT are marketing research, coordination of the international activities of local tourist administrations. ENIT is subordinate to the central executive branch (formally the Department of Tourism under the Ministry of Production Activities) and is fully financed from the budget (about \$ 30 million per year).

Activities to attract tourists to the French Republic are carried out by the French National Tourist Office, the budget of which is formed by the receipt of public funds.

External marketing in the Federal Republic of Germany is carried out by the German Tourism Center. The organization was created by the federal government and has representative offices abroad. The main objectives of the organization are to create and maintain the image of the Federal Republic of Germany as a country favorable for tourism.

In the Republic of Spain, a similar marketing branch is Turespaña (Turspain) company, which is a member of the Ministry of Industry, Energy and Tourism, and responsible for promoting Spanish tourism in the world.

Based on world experience, for the purposes of efficient development of the industry and activities of domestic tour operators, introduce uniform norms and service standards, the issue of creating a DME (national level) with an extensive network of representative offices in the country's regions (regional DMEs), which will be fully responsible for promoting tourism, is an acute issue. in international and domestic markets.

In this connection, it is advisable to create a National Tourism Office in the format of a national company, which will be authorized to perform the following functions:

- 1) professional management of the tourist brand of Kazakhstan;
- 2) promotion of Kazakhstan as an international tourist destination;
- 3) formation and implementation of marketing strategies;
- 4) organization of anchor events, attracting tourists;
- 5) providing the contents of a single tourist portal of Kazakhstan;
- 6) monitoring the quality of the provision of services and preparing proposals for their improvement;
- 7) statistics gathering in order to achieve maximum correspondence of the received tourist experience to the expectations of the visitors of the destination;
- 8) analysis of the whole spectrum of tourism activity both in the whole country, and in terms of clusters, tourist zones, etc.;
- 9) monitoring the existing structure and the number of offers of tourism products;
- 10) monitoring trends in tourism, timely response to changes;
- 11) stimulating the inflow of both external and internal investments in the tourism industry, attracting investors for the implementation of tourism projects;
- 12) ensuring the improvement of the quality of services and qualifications of specialists in the field of tourism;
- 13) analysis of the tourism potential of the country as a whole and regions, development of proposals for the development of quality standards for tourism products;
- 14) Formation and maintenance of a strategic partnership between government, business and tourists.

At the same time, in pursuance of the Address of the Head of State dated January 31, 2017 “Third Modernization of Kazakhstan: Global Competitiveness”, the Government of the Republic of Kazakhstan decided to use “Project Management”.

The Government has determined the “Olympic Highway” from 6 sectors of the economy, where the tourism industry is considered as the main driver of diversification of the country's economy.

The main conditions for the successful implementation of “Project Management” are the close involvement of the private sector and business as the main driving force for growth, as well as the effective promotion of the country's image and the attraction of a large flow of tourists, which is why there is also an urgent need to create a National Tourism Office.

In accordance with the Law of the Republic of Kazakhstan dated March 1, 2011 "On state property", a national company is a joint-stock company created by the decision of the Government of the Republic of Kazakhstan, operating in industries that form the basis of the national economy. By 2025, the tourism industry should be one of the components of the basis of the national economy, whose share in the country's GDP should be about 8%.

At the same time, the status of the National Tourism Office in the format of a national company makes it possible to open representative offices in the countries of near and far abroad to attract tourists and investors to Kazakhstan, and also provides the company with conditions to conclude contracts with foreign and domestic enterprises for the procurement of goods, works and services based on standard procurement rules, which will favorably affect the efficiency of decision-making when promoting Kazakhstan as a tourist destination.

In order to reduce the burden on the budget, the possibility of a phased implementation of the “bed-tax” fee for tourism development will be considered as the main source of financing for DMEs.

#### Image Strategy

As part of the development of the image strategy, approaches to the promotion of Kazakhstan tourism products abroad through the implementation of the following measures will be reviewed:

1) the formation of a single calendar of events and an interactive 3D tourist map, using which a tourist will be able to take a virtual tour of a particular region of the country;

2) working out the issue of developing a single national brand to work in international markets;

3) intensification of work on cooperation with international tourism organizations (UNWTO, RATA and others.);

4) support and further filling in the specialized online platform [www.kazakhstan.travel](http://www.kazakhstan.travel), which reflects all the tourist offers in Kazakhstan and provides online booking functions;

5) organization of study tours in Kazakhstan for representatives of the media (press tours) and foreign professionals in the tourism industry (info tours) to inform and promote tourism products in Kazakhstan;

6) holding a specialized exhibition on inbound tourism in Astana and Almaty in B2B format with mandatory info tours.

#### Fast Effect Measures

The development of the tourism industry in Kazakhstan can lead to tangible results when the following conditions are met:

- 1) proper packaging and commercialization of certain tourism products;
- 2) increase in volume and decrease in the cost of air communications within Kazakhstan, as well as between Kazakhstan and other countries;
- 3) professional determination and implementation of specific promotion activities.

Based on the above criteria, it will be possible to achieve the following “quick results”:

- 1) creation of MICE tourism products in the cities of Astana and Almaty with the priority of international conferences and major events;
- 2) creation of DMO at the national and regional levels, which will ensure close interaction with business, effective development of the entire tourism system within the country;
- 3) development of several tours in six clusters, as well as throughout Kazakhstan;
- 4) conducting online promotion events, including events on leading Internet platforms: Google Earth, Trip Advisor and social networks: Facebook and Twitter.

For the implementation of large tourism projects and the subsequent management of created infrastructure facilities, tourism resources, there is a need for highly qualified specialists, top managers.

For this purpose, as well as to improve the quality of services and internal management systems, a training system will be introduced in the form of trainings and advanced training in tourism for leaders of tourism companies and locations.

#### 5. PERIOD OF IMPLEMENTATION AND EXPECTED RESULTS OF THE CONCEPT

In order to achieve the mentioned goals and objectives, the following periods of implementation shall be offered:

The years 2017-2019 - it is most important because the success of subsequent periods depends on the implementation of work: adaptation of existing and creation of new legal measures and institutional mechanisms, including the creation of a National Tourism Office with an extensive network of representative offices in the regions of the country. At this stage, tourist clusters will be formed; national (large) tourism projects have been prepared and their construction initiated through private investment, including foreign ones, the development of other (small) tourism projects has been stimulated, a marketing system has been developed, and other measures aimed at obtaining quick results have been taken.

One of the key issues of increasing the institutional efficiency of the tourism industry is close integration with the fields of economy, culture, work with children and youth, social security of citizens, physical education and sports, education, employment assistance and preservation of the natural and cultural-historical resources of our country.

From the point of view of private investment, it is planned to build new accommodations and tourist infrastructure facilities as part of the development of anchor and regional tourism projects, including low-risk projects and the possibility of implementation within a short time.

The years 2020-2023 – further development of domestic and inbound tourism is planned. At this stage, it is important to actively promote the tourism potential of the country, to continue the development of infrastructure, strengthen the potential of human resources and carry out various marketing activities. At the same time, during this period, the implementation of the events of 2017-2019 will continue with the diversification of tourist offers and significant support for small and medium-sized enterprises for the development of tourism projects throughout the country.

In order to increase the investment attractiveness of the tourism sector and ensure the conditions for the development of the industry, one of the priority sectors of the economy will create modern highly effective and competitive tourist complexes for the integration of Kazakhstan tourism in the global tourist market.

The main indicator of the development of the tourism industry shall be the number of visitors, overnight stays, as well as income from tourism activities. Achieving the goals and objectives of this Concept will be determined through the growth of tourism development indicators.

#### Expected Results

Successful implementation of the above goals and objectives will lead to the next increase in the tourism industry indicators in the Republic of Kazakhstan:

- 1) increase in the output of accommodation and food services in 2023 up to 875.0 billion tenge;
- 2) increase in the output of passenger air transport in 2023 up to 380,0 billion tenge ;
- 3) increase in provision of room nights in 2023 up to 15 million room nights;
- 4) increase in the number of internal visitors in 2023 up to 12 million people;
- 5) increase in average expenses of domestic visitors in real terms up to 71.8 thousand tenge;
- 6) increase in the number of incoming visitors in 2023 up to 5.5 million people;
- 7) increase in average expenses of incoming visitors in real terms up to 248 thousand tenge.



## 6. LIST OF NORMATIVE LEGAL AND LEGAL ACTS THROUGH WHICH THE IMPLEMENTATION OF THE CONCEPT IS SUPPOSED

1. Civil Code of the Republic of Kazakhstan dated December 27, 1994.
2. Forestry Code of the Republic of Kazakhstan dated July 8, 2003.
3. Code of the Republic of Kazakhstan dated December 10, 2008 "On taxes and other obligatory payments to the budget".
4. Land Code of the Republic of Kazakhstan dated June 20, 2003.
5. Law of the Republic of Kazakhstan dated July 7, 2006 "On specially protected natural areas".
6. Draft Concept of the proposed law "On amendments and additions to certain legislative acts of the Republic of Kazakhstan on the issues of tourism activities" (deadline until the end of 2017).
7. Draft decree of the Government of the Republic of Kazakhstan "On approval of the Action Plan for implementation of the Concept of tourism industry development of the Republic of Kazakhstan until 2023" (deadline – September 2017).

8. Strategic plans of central state bodies.

A legend to abbreviations:

Institutes and companies:

SMIT - Moroccan Society of Tourism Engineering

UNWTO - World Tourism Organization

UNESCO - United Nations Specialized Agency for Education, Science and Culture

Countries and Regions:

EU - European Union

UAE - United Arab Emirates

Other terms and abbreviations used:

LEB - Local Executive Authorities

MICE - meetings, incentive tours, conferences / forums and exhibitions / events

SEM (Eng. Searchenginemarketing) - Search Engine Marketing

DMO (Eng. Destination Management Organization) - a tourist destination management organization

GDP - gross domestic product

GNPP - state national natural park

SME - small and medium business

SPNA - specially protected natural area

FS - Feasibility Study