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ADVANCES IN GLOBAL SERVICES AND RETAIL MANAGEMENT

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The Place of Kazakhstan Tourism Sector in the Countries of the Region in Terms of Transportation Infrastructure

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Abstract

For most countries with high tourism potential in today's world to develop economically and provide the foreign currency income it needs, it is necessary to increase the level of employment, market share and revenues it receives in the national sense. Because of this, many countries are engaged in relentless competition with each other in the international tourism sector. The different dimensions of the concept of National Competitiveness have attracted the attention of many researchers from various disciplines. While the discipline of economics makes the concept of competition a subject of examination at the international level in the light of the country's macroeconomic indicators, the discipline of management is concerned with the international dimension of competition at the firm, sector, and national level. In other words, two different disciplines are trying to explain the national competitiveness by making different analysis units the subject of examination. As a result of this, different disciplines explain national competitiveness depending on different dynamics and are able to make different interpretations regarding the result. This study tries to explain the competitiveness of Kazakhstan's tourism sector within the Eurasian region within the framework of infrastructure and transportation infrastructure, considering the dynamics on which national competitiveness depends both in terms of the discipline of economics and the discipline of management. In particular, the difference in the development situations of countries and the need to explain the competitiveness of the tourism sector with the dynamics of transport and logistics infrastructure because of this difference in development are important. For this purpose, it has been tried to reveal the competitiveness of Kazakhstan comparatively by analysing the data obtained from the second data sources.

Keywords: Kazakhstan, tourism, infrastructure, transportation, technology

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Introduction

Today, the international arena is witnessing a rapid development in the field of technology and transportation. Changes in the field of transportation and technology directly affect all areas of

economic and social life, the approaches of public administration, business world, business methods and the lives of citizens. In other words, changes in the field of transportation and technology lead to social transformation and change. In this context, adequate provision of transportation and information-communication products and services has a direct impact on economic growth and development. Transportation constitutes a fundamental component of the tourism sector as it makes travelling possible. First, transportation provides the development of tourism. The development of transportation systems also facilitates the development of the tourism sector and the spread of Tourism. As tourism spreads, the transportation sector develops. This development is also valid and important for tourism, which is of great importance for the development of countries. After the developments, the traditional definition of traditional transportation and transportation concept has also changed, and the concept of tourism transportation has emerged in the context of touristic mobility.

Tourism, which is an activity of recognizing different countries, cultures and people, is an activity conducted using transportation roads and means of transportation. The strong relationship between tourism and the transportation sector has given rise to the concept of tourism transportation. Tourism transportation is a service activity that ensures the fast, safe and healthy transportation of people from tourism markets to tourist attraction centres during touristic trips (Gürdal, 1990:13).

As the tourism sector has developed, the speed of transportation vehicles has been increased to improve the effectiveness of transportation in the holiday process; conditions such as trust, regularity, competition and comfort between transport systems have been introduced. For example, in Kazakhstan, which is the sample of the study, railroad transportation has played a major role in the birth and development of many resorts, historical and cultural centres.

The tourist chooses the main type of transport to use during the trip by examining the cost, distance, time and comfort factors. But due to geographical reasons, it may be necessary to use only certain types of transportation to reach some countries or holiday destinations. Tourism operators, especially tour operators, need to analyse and conduct the mutual relationship between tourism and transportation types well (Gürdal, 1990:13). For example, it is important to choose the most suitable transportation type for both tourists and operators in organizing package tours. Passenger and goods transportation should be considered by evaluating domestic and international interactions in terms of all types of transportation.

The introduction of air transportation to many cities in Kazakhstan has facilitated access to remote points of the country. The increasing number of organized tours has also improved air transportation. Accordingly, railway voyages have been opened. Transportation in Kazakhstan plays an important role in domestic and foreign tourism. The forms of transportation used in the world and in Kazakhstan tourism are air, road, sea, railway and intermodal, multimodal or combined transport, which is the most widely used and modern form of transportation in the modern world. Combined transportation is the transportation carried out by more than one method without reducing the movement speed of the product or changing its scale.

The impact of new formations in World Tourism is intensively observed on the transport sector. The transportation sector, which has a direct relationship with almost all sectors, plays a key role in gaining competitive advantage in international tourism. To deliver products or services in a faster and more economical way by being one step ahead of the target competitors, constitutes the

core of the transportation activities. Coordination of transportation communication with the tourism sector with the countries in the region is becoming increasingly important. In Kazakhstan, which has a large region, transportation ensures the integrity of the country by uniting all sectors of the economy and significantly affects the development of tourism. As there has been a steady increase in the share of tourists in transport infrastructure passenger traffic in recent years, the development of tourism is largely dependent on its transportation.

It is seen that Kazakhstan, which has a tourism potential, and the countries in the region are in a fierce competition with each other in the international tourism market in order to increase their market share and national income. It is extremely important to determine what factors determine the comparative competitiveness of the Kazakhstan tourism sector in terms of transportation among other countries in the region. For this purpose, the factors determining the competitiveness levels of some of the countries of the region and Kazakhstan have been discussed by using the data in the 2017 Report on Competitiveness in Travel and Tourism published by the World Economic Forum. Competition variables have been grouped into 3 categories. These are Air Transport Infrastructure, Ground and Port Infrastructure and Touristic Service infrastructure. In addition to this, the factors affecting the competitiveness of Kazakhstan in the international tourism sector positively and negatively have been tried to be identified. In this study, which is based on qualitative research method and uses document review technique as data collection tool, descriptive analysis technique has been used to analyse the data.

The need to increase the competitiveness of the Kazakhstan tourism industry in the context of global competition is due to the following reasons: Today, tourism has become a significant global socioeconomic phenomenon, which significantly affects the country's economy, is a factor that ensures the stability of the world economy, can benefit the country's geographical location, natural and climatic resources, cultural and historical monuments and landscapes. In many countries of the world, the transportation infrastructure in the tourism sector is the largest (and only in some cases) taxpayer, it provides the entry of foreign currency into the national economy, has a positive effect on the investment environment and the external economic image of the state. The service sector such as tourism and transportation is carried out with state and private organizations at the crossroads of developing economies. In tourism transportation services, the process of internationalization of the services of the tourism market of Kazakhstan and the countries in the region that lead to "cross-border tourism" has clearly revealed the need to determine the competitiveness potential.

In line with this importance, the aim of the study is to determine the tourism potential of Kazakhstan in terms of transportation infrastructure by measuring its competitiveness in tourism and to reveal its position among the countries in the region. In this context, all the pros and cons of the Kazakhstan tourism sector and its position among the countries of the Central Asian region has been tried to specified. It is aimed to provide services with opinions and suggestions that will contribute to the tourism sector with the results obtained afterwards.

Methods

In this study, secondary data has been used. Secondary data collection techniques from qualitative research methods were used to achieve the purpose of the research. For secondary data, the main variables related to the infrastructure and logistics elements necessary for the development of

Tourism have been tried to be determined by conducting an extensive literature study. Secondary data consists mainly of printed sources consisting of documents in magazines, newspapers and corporate publications, such as books, articles, reports, discussion texts, policy texts. Secondary data mainly consists of printed sources, including documents in magazines, newspapers and corporate publications such as books, articles, reports, discussion texts, policy texts. In this study, rather than physically accessible printed sources, electronic libraries, thesis archives, corporate web pages have been used. Since there is a large literature on the research field, it has been a necessity to reach a large number of sources. Research continued until the obtained resources were perceived as having the breadth and scope to undertake the studies in the whole field and especially until the studies of the indispensable researchers in this field were reached

Data Analysis

The interview texts collected were preserved and used by the researcher within the framework of the research. The data obtained have been summarized and interpreted by descriptive analysis method. Operations such as analysis, reporting and interpretation of the data collected within the framework of the research have been carried out. Firstly, an evaluation will be made based on the data obtained from the World Economic Forum, and then an evaluation will be made regarding the interview records obtained from the experts. This research is about the transportation infrastructure of Kazakhstan and the countries in the region. For this reason, only the data in the context of this criterion has been evaluated. One of the most important goals of a country today is to provide and maintain competitiveness against its competitors in the international arena. One of the most reliable studies for evaluating the national competitiveness of countries in a global context is the research report published by the World Economic Forum regularly every year.

Comparison of Infrastructure Competitiveness Indices of Eurasian Countries

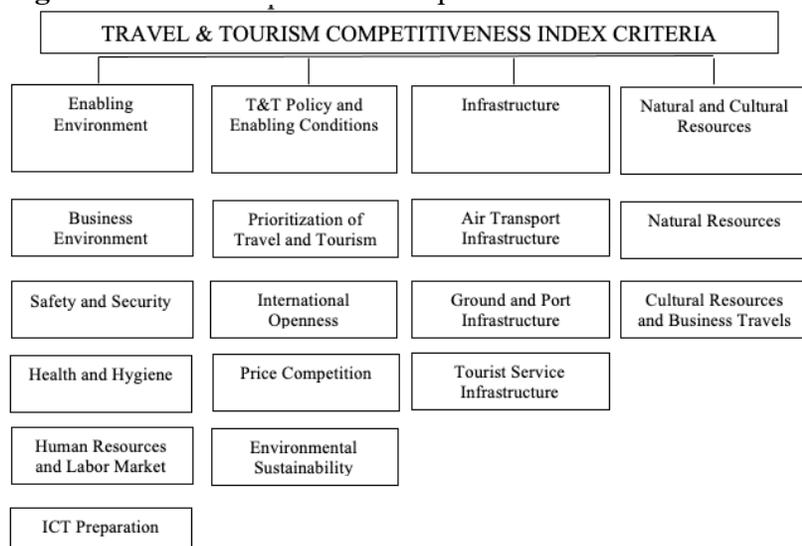
In this chapter of the study, the infrastructure indices of the countries of the Eurasian region will be compared. The states we have studied under the title of Eurasian region are Russia, Azerbaijan, Kazakhstan and Kyrgyzstan. Due to the lack of data on Uzbekistan and Turkmenistan, these two countries could not be evaluated.

Our comparison is based on the WEF report and “Air Transportation Infrastructure”, “Land and Port Infrastructure”, and “Touristic Service Infrastructure” are used as measurement subjects. These titles are divided into various indices within themselves.

Table 1. Comparison of Infrastructure Competitiveness Indices of Eurasian Countries: Air Transportation Infrastructure, Land and Port Infrastructure, and Touristic Service Infrastructure

| Air Transport Infrastructure | Ground and Port Infrastructure | Tourist Service Infrastructure |
|---|---|--|
| Air transport infrastructure quality, Current seat mileage (domestic/international), Number of aircraft departures, Airport density, Number of airlines. | Quality and density of the roads, Asphalt road density, Railway infrastructure quality, Railway density, Quality of the port infrastructure, Efficiency of land transport. | Hotel rooms, The quality tourism infrastructure, The existence of large car rental companies, Automatic teller machines per adult population. |

WEF measured the infrastructure system of Eurasian regional countries in the context of the indices listed above. The evaluation carried out by the institution is shown in Figure 1 below.

Figure 1. Travel & Tourism Competitiveness Index Model**Table 2.** Tourism Competition Criteria and Scores of Region Countries

| Country | Ru | Az. | Kz. | Mon. | Kg. |
|---|------|------|------|------|------|
| 1: Business Environment | 4,09 | 4,57 | 4,93 | 4,41 | 4,4 |
| 2: Safety and Security | 4,31 | 5,85 | 5,54 | 5,65 | 4,96 |
| 3: Health and Hygiene | 6,7 | 6,09 | 6,69 | 5,82 | 5,76 |
| 4: Human Resources and Labour Market | 4,83 | 5,04 | 4,82 | 4,45 | 4,37 |
| 5: ICT Preparation | 4,98 | 4,97 | 4,91 | 4,02 | 3,59 |
| 6: Prioritization of Travel and Tourism | 4,21 | 4,8 | 4,27 | 3,98 | 3,64 |
| 7: International Openness | 2,21 | 2,95 | 2,27 | 1,88 | 2,3 |
| 8: Price Competition | 5,75 | 5,38 | 5,9 | 5,72 | 5,45 |
| 9: Environmental Sustainability | 4,11 | 4,05 | 3,83 | 3,41 | 3,72 |
| 10: Air Transport Infrastructure | 4,51 | 2,43 | 2,57 | 2,17 | 1,87 |
| 11: Ground and Port Infrastructure | 3,05 | 3,71 | 2,8 | 2,13 | 2,05 |
| 12: Tourist Service Infrastructure | 4,46 | 3,33 | 3,11 | 2,69 | 2,2 |
| 13: Natural Resources | 3,85 | 2,38 | 2,55 | 2,75 | 2,42 |
| 14: Cultural Resources and Business Travels | 3,23 | 1,73 | 1,64 | 1,83 | 1,56 |

Note. Ru: Russia; Az: Azerbaijan; Kz: Kazakhstan; Mon: Mongolia; Kg: Kyrgyzstan

Table 3. Transportation Infrastructure Sub-Criteria and Scores of Region Countries

| Infrastructure Components | Az. | Kz. | Kg. | Mon. | Ru. |
|--|-------|-------|-------|-------|-------|
| Score | Score | Score | Score | Score | Score |
| 10: Air Transport Infrastructure | 2,4 | 2,6 | 1,9 | 2,2 | 4,5 |
| Quality of air transport infrastructure | 5,3 | 4 | 2,9 | 3,1 | 4,4 |
| Current seat mileage (Domestic) | 0,4 | 118 | 4,2 | 2,4 | 2014 |
| Available seat mileage (international) | 95,9 | 165 | 69,7 | 24,3 | 1567 |
| The number of Airplane departures | 1,9 | 4,1 | 2,8 | 1,8 | 5,3 |
| Airport density | 0,9 | 2,1 | 0,9 | 4,2 | 1,5 |
| The number of operating airlines | 30 | 35 | 21 | 9 | 135 |
| 11: Ground and Port Infrastructure | 3,7 | 2,8 | 2,1 | 2,1 | 3 |
| Quality of roads | 4,4 | 3 | 2,5 | 3 | 2,8 |
| Road density | - | - | - | - | - |
| Asphalt road density | - | - | - | - | - |
| Quality of railway infrastructure | 4,2 | 4,3 | 2,4 | 2,7 | 4,4 |
| Railway density | 2,4 | 0,5 | 0,2 | 0,1 | 0,5 |
| Quality of the port infrastructure | 4,3 | 3,1 | 1,5 | 1,3 | 4 |
| Efficiency of land transport | 4,9 | 4 | 3 | 3,4 | 4,4 |
| 12: Tourist Service Infrastructure | 3,3 | 3,1 | 2,2 | 2,7 | 4,5 |
| Hotel rooms | 0,2 | 0,3 | 0,1 | 0,2 | 0,3 |
| The quality of tourism infrastructure | 4,8 | 3,5 | 3,7 | 2,8 | 3,6 |
| The existence of large car rental companies | 4 | 2 | 1 | 2 | 5 |
| Automatic teller machines per adult population | 35,1 | 72 | 24,7 | 58,8 | 185 |

Note. Ru: Russia; Az: Azerbaijan; Kz: Kazakhstan; Mon: Mongolia; Kg: Kyrgyzstan.

According to Table 2, the general overall score of Eurasian countries on "Air Transport Infrastructure" is 2.5. Kazakhstan, on the other hand, scored 2.6 points, slightly above the overall average and ranked second among eight countries. While the Russian Federation ranked first with 4.5 points, Kyrgyzstan ranked last with 1.9 points. In the "Land and Port Infrastructure" measurement, the overall average score of Eurasian countries is 2.9. Kazakhstan, on the other hand, received 2.8 points, remaining slightly below the general average and placed sixth in the ranking. Azerbaijan ranked first with 3.7 points, while Kyrgyzstan ranked last with 2.1 points. In the measurement of "Touristic Service Infrastructure", the overall average of Eurasian countries is 3.4. Kazakhstan, on the other hand, was below this average with 3.1 points and ranked sixth among the countries of the region. The Russian Federation was ranked first with 4.5 points, while Tajikistan was ranked last with 2.1 points.

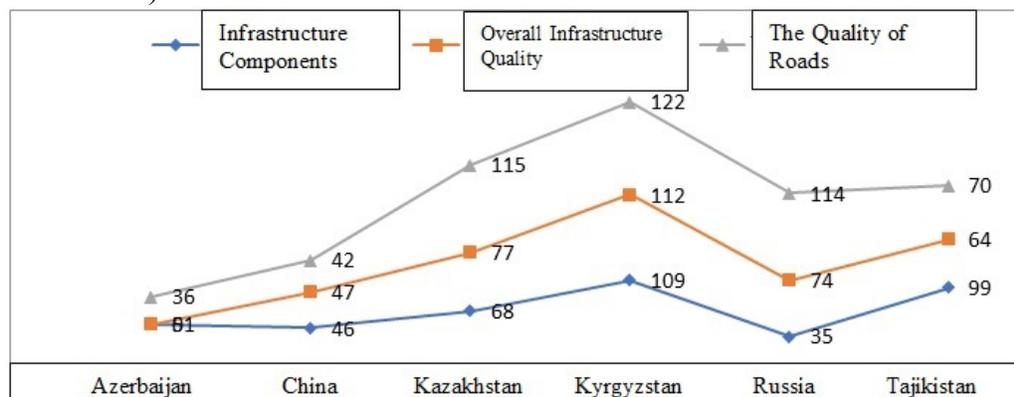
According to Global Competitiveness Index

The Global Competitiveness Index (GCI) aims to conduct research and studies on how a country's national competitiveness, which can be improved by reforms in different branches, can affect countries' long-term productivity. The Global Competitiveness Report, based on the idea of Clause Schwabs in 1979 and prepared by Xavier Salai Martin in cooperation with the World Economic Forum, has been published since 2005.

GCI is the weighted average of numerous components that affect competitiveness. Each component reflects a dimension of the complex concept called competitiveness. All the components in question define the 12 components on which competitiveness is based and their characteristics in this context.

On October 7, 2018, the World Economic Forum (WEF) published an annual report on the Global Competitiveness Index (GIC) for 2018. The data in this report has been based on 114 indicators calculated on the basis of statistical data and a survey of managers of medium and large enterprises in the country. 12 competitiveness factors have been determined out of 114 indicators.

Figure 2. The Ranking of the Road Infrastructures of Kazakhstan and the Countries in the Region According to the Global Competitiveness Index, (The Global Competitiveness Report 2017–2018)



When the Figure 2 above is analysed, it is seen that, according to the Global Competitiveness Index, there is no country in the first group (very good) rank in the ranking of road quality in the

title of road infrastructure of Kazakhstan and the countries in the region. According to the chart presented above, it is seen that Kazakhstan ranks in the same place as Russia among the countries in the region. Countries included in the second group in the chart have the most favourable positions in the competitiveness index of tourism services with railway infrastructure.

Conclusion

In the tourism sector, especially in international travel, vehicles are the name given to the means of transportation that take passengers and goods from one point to another on the roads. The most primitive means of transportation are animals with and without carriages, and primitive bicycles as non-motorized land vehicles. Primitive watercraft rafts, trucks, ships, planes and high-speed trains all encompass all land, water, air and rail vehicles (Kayar & Kozak, 2008:78). In the tourism sector, especially in the international sense, aircrafts are mostly used as vehicles. Aircrafts are now the reason for choice over short distances with the advancement of airline transportation and the increase in the number of low-cost airline organizations (Kansu et al, 1971:186).

We can classify transportation vehicles as vehicles used in rail systems, highways, airlines and maritime lines (Kayar & Kozak, 2008:81). Tourism transportation is an activity related to the transportation of individuals from tourism markets to tourist attractions during their travels for touristic purposes. The structural features of tourism transportation are as follows (Gürdal, 1995:13):

- Tourism transportation mechanisms are a feature that contributes time to people at a low price in accordance with economic rules.
- Tourism transportation is a rational activity that provides the conditions of our modern era, such as speed and trust.
- Tourism transportation is an activity that requires coordination between transportation mechanisms, especially in multicentre package tour organizations.

Tourism, which has developed along with the travel and accommodation of people, has also greatly affected the development of all public and private transportation (Holloway, 1994:68). Regardless of the purpose, the fact that people are traveling has led to an increase in both accommodation and transportation demands, and new investment demands have arisen due to the insufficiency of existing seat and bed capacities. An increase in the level of supply has led to competition, and reduced prices due to competition have also caused people with lower incomes to start participating in tourism activities and increased demand (Holloway, 1994:72).

Transportation is a value of tourism that offers opportunities to those traveling with various destinations like business, vacation, visiting close relatives or friends, health, education, etc. Transportation serves as a link between departure and arrival distances in tourism. People who are tourists have to accept the main transportation plan given to them by tour operator with package tours and trips they perform. Apart from this, they determine the types of transportation that are part of their travel and holidays (Tunçşiper, 1995:59).

The mode of transportation used is also effective in the sales of package tours. The inclusion of tourism as an interdisciplinary field allows it to be considered within a system approach. The interactions between the system approach and the values that make up tourism and the effects of

these interactions on each other can be easily noticed. Today, we can reflect this analysis made in ancient times to a slightly more general scope (Tunçsiper, 1995:61). There is no fundamental difference between the international tourist flows and the travel activities within the borders of the same state. Transportation constitutes the most important factor of output components in tourism production. But no matter how important it is, it acts as an intermediate product. The fact that tourism activity takes place in a non-transportation situation does not necessitate transportation to be regarded as a final product.

All states with touristic value in the world are engaged in an effort to increase the impact of tourism on economic, political, environmental and social-cultural events in terms of their own states. International tourism, which started to take place among European states in general, has spread to other countries and geographies with the increase of living standards, total income, urbanization and social rights in today's world. As of the second half of the twentieth century, mass tourism has gradually gained momentum.

Advances in the international tourism sector have attracted the attention of many developed and developing states. In order to increase their share of the tourism sector, states have almost entered into a race with each other to organize and develop tourism activities that can satisfy these demands and expectations. Based on intense competition, this race reflects an important opportunity for states that want to gain a greater share of Tourism and are in the process of development. Developing countries are entering a race with other states similar to themselves. Kazakhstan, which we have discussed in our study, is in intense competition with the Central Asian states, which are geographical relatives.

Kazakhstan is an important state for the tourism sector with its indigenous culture, historical and natural wealth. Kazakhstan's tourism market has undergone a lot of changes throughout history. After the collapse of the USSR, which dominated the Central Asian states and cut off the communication of these states with the world, various opportunities have arisen in the tourism market for Kazakhstan. With the collapse of the USSR, people at one end of the world can now travel to Kazakhstan, and Kazakh citizens can easily travel to other countries. After the collapse of the USSR, it can be said that interest in the geography of not only Kazakhstan, but also all other Central Asian states increased. As a result of the economic and social problems that Kazakhstan has faced since the first years of its independence, there have been various fluctuations in the number of tourists visiting the country and in tourism activities. However, the revival in tourism in the period from the 2000's to the present has positively affected the tourism market of Kazakhstan.

Based on the development processes of the tourism sector in the world, it can be said that Kazakhstan's tourism policies follow a tourism policy in which mass or alternative tourism outweighs in terms of the development of the country's tourism. Considering the existing tourism policies, it is noteworthy that the sustainability of alternative tourism types has been planned in terms of the development of tourism in Kazakhstan. Although the tourism market of Kazakhstan is at a young and immature stage, the importance of the market is gradually increasing and it is seen that significant investments have been made in terms of tourism income today. Most of these investments have also been made in the field of transportation. Because, for countries that are in the process of development such as Kazakhstan, the importance of transportation routes is increasing as the tourism demand is from abroad and tourists must be brought to the country.

In this study, the competitiveness of Kazakhstan in tourism in terms of transportation infrastructure was examined from the point of view of the countries of the region in the context of the comparative advantages model. In this context, an assessment was first made based on data from the World Economic Forum. Afterwards, the semi-structured focus group interview technique was applied in order to measure the competitiveness of Kazakhstan in tourism and to see where it is located, and the data obtained from the interviewees in Kazakhstan, consisting of politicians, bureaucrats and NGO managers, were analysed and interpreted.

When the data obtained from the interviewees are evaluated in general, they generally stated that Kazakhstan ranks third among thirty-two countries in terms of length in the Asian Main Highways Project. They highlighted the importance of the country's being in the centre of the Turkic World and thus gaining many tourists. They brought country's cultural wealth into the forefront. When the second qualitative data is examined, it is seen that with the Travel and Tourism Competitiveness Index, Kazakhstan ranks after China, Azerbaijan and Russia according to the ranking of countries in the region. It has a more competitive position compared to Kyrgyzstan and Tajikistan. Interviewers' statements and the Travel and Tourism Competitiveness Index were also found to have parallel results compared with the data. For this reason, since the railways are dominated by both passenger and freight transport in Kazakhstan, the demand in railways should be gradually transferred to other transport systems, especially highways, for a balanced and more efficient transport planning.

Interviewers have stressed that Kazakhstan's place in the international market has been positively affected. They claim that the use of tourism infrastructure in Kazakhstan is less than in developed countries, and that necessary regulations and studies should be carried out, both on highways, railways and new lines, for the development of infrastructure to increase the level of competition with these countries. It is necessary for transport sub-sectors to work complementary to each other and to prepare the necessary infrastructure for the dissemination of combined transport. They also state that it is necessary to improve the infrastructure on the required and existing lines, ensure modernization, and implement the existing road and railway infrastructure in a timely manner in accordance with the growing demand for transportation. Since it has become a necessity for Kazakhstan to offer or create different alternatives by taking advantage of new modernization and strategic developments that meet the competitive conditions and offer solutions to changing demand conditions, the negative parts of the legislation regarding infrastructure renewal and the use of highways and waterways should be rearranged and if necessary, legislation and regulation changes should be provided.

Kazakhstan should aim at gaining competitive advantage by further developing its transportation system and network and increasing the transportation opportunities between the countries in the region and determining new plans and strategies that fit the changing competitive environment. Besides the shortcomings of Kazakhstan, there are several pros. For example, it is seen that, it is at a more advanced level compared to the states in the region on the regional competitiveness which is also the subject of the study. It is believed that Kazakhstan, the leading potential of the region, will take a better path in the development process in the coming years and experience a jump in level. In addition, it is seen that the transportation infrastructure has developed quite rapidly and has experienced leaps as a result of the measurements carried out by the world statistical institutions. In this context, rational plans should not be deviated during the development process. In this context, it should not be deviated from rational plans during the development

process and compliance with organized plans must be ensured. Accordingly, modernizing the tourism infrastructure of Kazakhstan emerges as the first priority.

As a result, it can be argued that the competitiveness of Kazakhstan in the tourism sector and transportation is gradually increasing. One of the main reasons for this is the acceleration of the third modernization process in Kazakhstan in terms of competition. However, the dependence of the transport sector on tourism needs to be carefully managed and planned. For this purpose, a long-term strategy with concrete goals prepared by the consensus of all segments for the transportation sector in Kazakhstan should be urgently prepared. The aim of this study is to present extensive data covering Kazakhstan and the countries of the region and to investigate the current situation. From this point of view, there has been an obligation to limit the elaboration on some countries of the region. It is thought that it will be beneficial to encourage studies that include field research on the basis of transportation and logistics for areas where strategy can be developed in future studies.

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