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TOURISM MARKET OF KAZAKHSTAN: KEY DIRECTIONS OF INCREASING COMPETITIVENESS OF TRAVEL COMPANIES

This article presents a research based on the development of effective directions in the activity of travel agencies which have an impact on the competitiveness of tourism services. This study analyzes the statistics of the Republic of Kazakhstan, the quantitative assessment of tourism companies competitiveness by the experts from Kazakhstan tourist industry was conducted. The research determines the 3 main areas of competitiveness: technical, economic and organizational, and provides important information for tourists companies on improving their competitiveness, meeting customer demands and maximize profits.

Keywords: competition; competitiveness; tourism; Kazakhstan.

Арміяш Нурмагамбетова, Ріна Агібетова

КАЗАХСТАНСЬКИЙ РИНОК ТУРИСТИЧНИХ ПОСЛУГ: ОСНОВНІ НАПРЯМКИ ПІДВИЩЕННЯ КОНКУРЕНТОСПРОМОЖНОСТІ ТУРИСТИЧНИХ ПІДПРИЄМСТВ

У статті досліджено і розроблено ефективні напрямки діяльності туристичних компаній, що впливають на підвищення конкурентоспроможності туристичних послуг. Проаналізовано статистичні дані, кількісно оцінено конкурентоспроможність туристичних компаній на базі експертних оцінок фахівців туристичної галузі Казахстану. Визначено 3 основні напрямки підвищення конкурентоспроможності: технічний, економічний та організаційний. Дослідження містить важливу інформацію для компаній щодо підвищення конкурентоспроможності, задоволення споживчого попиту і максимізації прибутку.

Ключові слова: конкуренція; конкурентоспроможність; туризм; Казахстан.

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КАЗАХСТАНСКИЙ РЫНОК ТУРИСТИЧЕСКИХ УСЛУГ: ОСНОВНЫЕ НАПРАВЛЕНИЯ ПОВЫШЕНИЯ КОНКУРЕНТОСПОСОБНОСТИ ТУРИСТИЧЕСКИХ КОМПАНИЙ

В статье исследованы и разработаны эффективные направления деятельности туристических компаний, оказывающих влияние на повышение конкурентоспособности туристических услуг. Проанализированы статистические данные, количественно оценена конкурентоспособность туристических компаний на основе экспертных оценок специалистов туристической отрасли Казахстана. Определены 3 основных направления повышения конкурентоспособности: техническое, экономическое и организационное. Исследование содержит важную информацию для компаний по повышению конкурентоспособности, удовлетворению потребительского спроса и максимизации прибыли.

Ключевые слова: конкуренция; конкурентоспособность; туризм; Казахстан.

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Introduction. Tourism is one of the largest and most dynamic sectors of economy, an important part of foreign economic activity of many developed and developing countries. High dynamics of its development, large amounts of foreign exchange earnings actively affect different sectors of the economy, which help the tourism industry to be formed. Tourism has a significant impact on the development of such important industries as construction, transport, communications, trade, consumer goods production, agriculture, and acts as a catalyst of social and economic development of countries.

Kazakhstan after gaining its independence has opened greater prospects in tourism development. Today there is an enormous interest to tourism in Kazakhstan, a country with a big tourism potential. The interest in Kazakhstan to tourism is expressed, first of all, in the form of legal provision by state of this activity (Zholdasbekov, 2001).

This industry can and should be one of the supporting sectors of economic development of the Republic of Kazakhstan, where an important factor of economic development with significant potential for tourism are domestic and inbound tourism (Nurgalieva, 2004: 3).

The analysis of the competitiveness ranking in travel and tourism has shown that Kazakhstan in 2013 occupied the 88-th place, while in 2011 it was on the 93-rd place. The 24 indicators of competitive advantage were identified. Among them, the "Health and hygiene" (3rd place), "The cost of starting business" (8th), "Infrastructure" (46th) (Travel and Tourism Competitiveness Report, 2013).

The overall income in Kazakhstan GDP from the travel industry in 2012 was 5.2% (The Authority on World Travel & Tourism, 2013).

The positive dynamics of Kazakhstan travel business development should be noticed. The income from tourism has increased by 43.6% during the last 4 years and the direct contribution of the travel industry into the GDP of Kazakhstan in 2012 was about 485.79 bln KZT. Moreover, visitor exports generated 272.8 bln KZT (1.9% of the total exports) in 2012. This is forecasted to fall by 6.5% in 2013, and the grow by 0.3% during 2013–2023, to 263.4 bln KZT in 2023 (0.8% of the total) (The Authority on World Travel & Tourism, 2013; Zhidkoblinova, 2013: 1079).

An important issue while observing the market in question is its competitive environment. In order to attract systematically a certain segment of consumers, it is necessary to identify, define, find or invent something that would have a continuing interest among a wide range of people with sufficient income or between a narrow range, however with a high level of income. At the same time, such idea should be so attractive that all who have interest should be ready to put aside the issues of comfort, which is today not sufficient (Iljina, 2004: 106).

The tourist market can be represented in the form of two relatively independent spheres (submarkets): the market of supply and the market of demand. In real practice both markets are closely related to each other, they interact and produce, promote, define the contents and the structure of the industry and consumer demand. Tourism business in Kazakhstan is characterized by a high degree of competition.

Huge competition at the market of tourist services reveals successful and lucrative tourist industry based on knowledge of international legal norms and regulations, tourism management and marketing, on a full knowledge of tourists' needs and demands (Nurmaganbetov et al., 2003).

Competition between travel companies in our country is enormous. Every year we observe more and more new tourist companies, each with own characteristics, advantages, new products, types of service, and experience.

It is useful to mention that every travel company has its own level at the market and very often tourists do not know about the real authority of a company (Ismaev, 2006: 174).

Competition requires from firms to create a competitive product and service (Wuthrich and Winter, 1995: 96). There is a dialectical relationship between competition and competitiveness – one follows the other. Of course, the categories "competition" and "competitiveness" should refer to a fixed period of time and specific market.

By analyzing the definitions of "competitiveness", "company competitiveness", it is clear that there is no single approach to the definition of these concepts (Nurmagambetov, 2009).

Latest research and publications analysis. Fundamentals of the competitiveness theory have been developed by Western economists. The works of the well-known economists from the school of classic economic theory such as Adam Smith, David Ricardo etc. were devoted to this issue. Theoretical and methodological aspects of the "competitiveness" category are often investigated in connection with the market reforms in the CIS countries. Such Russian scientists as E. Iljina (2004), D. Ismaev (2006), R. Fatkhutdinov (1999) etc. discuss the issues of competitiveness in the tourism context at the level of individual producers and goods.

Some aspects of this problem can be found in the works of domestic scientists: A. Alieva (2011), A. Alimbaev (2009), K. Nurmagambetov (2009), A. Zholdasbekov (2011) etc.

The competitiveness of services, firm, industry or country is represented by different levels, all interrelated.

Thus, a competitive service may be offered only by a competitive firm, and vice versa, the competitiveness of industry or the national economy is defined by the presence of competitive firms (Fathytdinov, 1999: 47).

The purpose of the study is to develop effective directions of travel agencies' activity which have an impact on the competitiveness of tourism services on the example of domestic tourism market in the Republic of Kazakhstan. We have supported our recommendations by inquiring tourist experts.

Methodology. The analysis of the current domestic and foreign literature shows that at present there is no single approach to the definition of products competitiveness, in particular to the definition of services competitiveness. Thus, competitiveness relies on different things according to the level on which it is assessed: on the country level competitiveness is the costs of optimization on the basis of the international labor division; on the industry level it is optimization and rational combination of economic factors; at the firm level it is effective actions on the basis of the new technologies introduction, saving regimes, the rationality of financial calculations; at the product level (goods and services) it is quality, production costs, efficiency of consumption etc.

We will support such definition of competitiveness: "the real and the potential ability of companies and their available options to design, manufacture and sell prod-

ucts which are on price and non-price characteristics together are more attractive to consumers than competitors' products" (Nurgalieva, 2004: 3).

The whole system of competitiveness factors can be divided into several groups. The first group consists of the factors of company competitive advantage (internal). This group of internal factors includes various aspects of the market activities of touristic companies, as well as the parameters which are reflecting the utilization degree of the service factors.

The second group of factors (external) includes the parameters of socioeconomic environment, which are beyond the direct influence of the travel company.

Factors of competitiveness are presented in Figure 1.

According to Figure 1, external factors of company's activity include the following components:

- legislation – the set of laws or legislation, programs aimed at legal competitiveness of domestic firms;
- taxation and tax liabilities;
- insurance – the creation of special reserve funds (hedge funds), designed to redress losses, caused by adverse events and accidents;
- environmental conditions – the external environment of firm with its environmental requirements to the production of tourism services, environment policies and security;
- sphere of tourism development – the opportunities and facilities for companies to receive the latest global elaborations and implement them into practice;
- demand on services – a set of customer requirements to the market of tourist services;
- size of a market – small part of a larger tourism market, which is constantly in the situation of intensive development and one of the most promising markets;
- labor market – a human labor potential of a country, region.

The internal factors of the company include the following components:

- social policy – the policy within firm management as for social activities;
- geographical location, technology funds and equipment – the availability for consumers – the key to success;
- maintaining the technology of tourist services – the main indicator for assessing benefits of competitive advantage;
- development of operational management system, including new business technologies, professional and scientific approach to financial resources' relocation, quality control and promotion of human resources;
- labour resources – employees, trainings and constant improvement of qualifications;
- in order to improve competitiveness, management applies marketing strategies on activity enhancement with the effective use of all resources;
- price relationships are distinguished in the whole reproduction process, from the acquisition of material and technical resources to the final realization of tourist services (Nurmagambetov, 2009).

In tourism the main form of goods is a tourist product – a set of non-real (in the form of services) and real (commodities) values, provided to tourists in order to meet their needs.

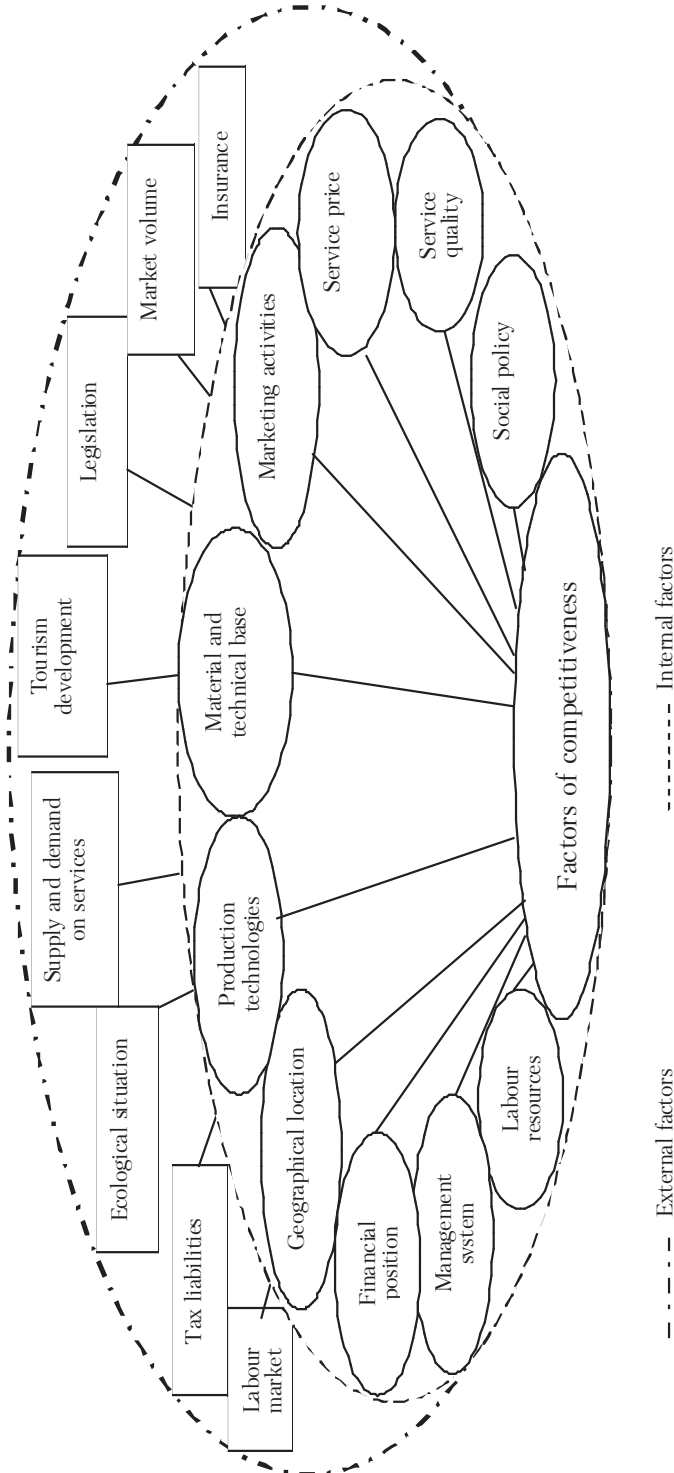


Figure 1. External and internal factors of an enterprise (Fathudinov, 1999)

Any product, as well as service providing to customers has a range of consumer characteristics and informal characteristics, and together they create the quality of a product or a service. As the technical category, quality reflects the multiplicity of properties, objects, processes and phenomena. Consequently, the concept of "quality" is not applicable only to items (products in physical form), but also to services of travel companies.

The quality of a service is defined as the totality of features and characteristics of services that give it the ability to meet the needs in accordance with regulations.

Consumer value is the attitude of people, consumers of products to products' properties, to the sum of them. This attitude may be positive in different degrees and negative in different degrees (Porter, 2002).

The same product or service can meet the demand in varying degrees, so it has the same quality, but different consumer value. Thus, under consumer value we shall understand the aggregate of its most important properties that lead to the degree of products suitability to meet specific needs in accordance with its purpose (McConnell and Brue, 1999).

There is an objective need for strengthening the role of consumer value of services as one of the decisive factors of the success of tourism companies at the tourism market under the conditions of market economy. Therefore, particular importance for competitiveness of tourist services evaluation, acquire such consumer properties that characterize the level of consumer value, such as:

- the degree of accessibility (how easy it is to get access to services);
- company reputation (trust to company);
- knowledge (if company understands the needs of clients);
- reliability (consistency and reliability of a service);
- security (if services production and consumption might have danger and risk);
- tangibility (material-technical base, interior etc.).

However, for customers not only the outcome of services use is important, but also the process of consumption itself, during which there is a contact with staff of a company and they can be estimated by the following indicators of the customer service level:

- staff competence (knowledge, professionalism);
- the level of communication (how well the company has brought to the consumer the essence of service);
- courtesy (staff are polite, considerate and attentive to customers);
- staff response (if employees are showing the desire and the ability to provide service quickly).

Hence, the following aspects are fitted to assess services competitiveness:

- the level of consumer value of services;
- the level of service (maintenance);
- the price of services.

In general, most of approaches to competitiveness evaluation on the sectoral level are based on the classical theory of international division of labor and comparative advantage. In accordance with the law of comparative advantage, countries specialize in manufacturing and exporting those goods and services which are less expensive and importing those which are cheaper in production in other countries.

The disadvantage of this method for evaluating services' competitiveness is the impossibility to measure comparative advantage directly within the framework of this theory; therefore, several indirect methods are proposed. The most common method is based on the following assumption: the lower is the cost of production in the industry, the greater are the advantages of the industry (and consequently a service company) in relation to competitors.

Due to the methodology of advantages comparing, it is difficult to assess the competitiveness of services or company, since the available advantages characterize not only a particular firm competitiveness, but also the competitiveness of the whole industry.

Therefore, it is advisable to use the methodology of quantifying evaluation of the attractiveness of a service for a client in relation to other services of a competitor with the same purpose and class (as proposed by K. Nurmaganbetov, 2009).

The advantage of this method is that it takes into account the most important factor which affects company competitiveness – the competitiveness of services. Business success at the tourist market is primarily determined by an attractive tourist product. The implementation of market interest of a tourist company to its tourist product determines the need for a detailed study of product's qualities and characteristics, and identification of the most attractive aspects for tourists.

In determination of the level of consumer properties of the service (LCP), the evaluation of its properties is carried out by using the method of expert scoring assessments according to estimated property – to the extent to the actually achieved level of the service to the requirements level for these properties from the client side.

We need to mention again that the methodology and problems regarding the evaluation of tourism sector competitiveness are investigated in various scientific studies. We support an idea that evaluation must be carried out by collecting, systematizing and analyzing the data of opinion polls and tourist surveys. These surveys must examine the experts' opinions on different tourist destinations.

This approach is particularly suitable for collecting important data on specific aspects of tourism destination competitiveness.

For this purpose we have conducted a set of inquiries with the experts from such companies as JSC "Akmolaturist", "Astana Best Travel", "Baiterek Travel", "Horizon" etc. Overall, 20 experts from the biggest domestic tour-operators (7 companies) and Kazakhstan Tourism Association were interviewed and the aggregate results of their estimation are presented (www.orexca.com).

LTD "Sayat" was selected as a subject of this research because this is one of the most dynamically developing touristic companies at our market.

The expert gives the mark (in points) from 0 to 10 with the interval of 1 for each evaluated service characteristics. Thus, the magnitude of the estimated parameter S is established expertly in the range $0 < S < 10$. In this case, the maximum score ($S = 10$), the property receives in that case, if its level is reached and, in expert opinion, is fully consistent with clients' requirements. The minimum score ($S = 0$) can be assigned only in special cases, because the service in accordance with its purpose cannot be provided under certain conditions. In all other cases, the property will receive a numerical score, which should reflect a particular expert relation to this property.

Further, statistical processing of the data received after expertise is derived. For this purpose, for each characteristic the average value given by the experts for evaluation is calculated.

After that, the determination of the level of consumer properties (*LCP*) is made, which is defined as the geometric average value of scores given by customers to individual service levels, according to their relative importance:

$$LCP = S_{1av}^{n_1} \times S_{2av}^{n_2} \times \dots \times S_{nav}^{n_n}, \quad (1)$$

where $S_{1av}, S_{2av}, \dots, S_{nav}$ – score estimation of individual characteristic of a service; n_1, n_2, \dots, n_n – coefficients of the relative value of service characteristics.

The procedure of assessing the relative importance of different service properties (characteristics) from customer point of view is a mandatory step in determination of the level of consumer service properties. The significance of properties is set by the expert estimates method by giving the appropriate numerical significance factor "n" in points for each characteristics of the evaluated services. The evaluation of properties significance shall be done by the experts from the perspective of customer of the evaluated service and shall be based on its primary purpose. During the calculations process the following results can be obtained:

- if $LCP = 10$, consumer properties of a service are fully compliant with the requirements of clients;
- if $LCP = 0$, it means that a client is not satisfied with a service and it is not consistent with requirements completely;
- if LCP is within the interval $0 < LCP < 10$, it shows how the level of service corresponds to customer requirements.

Moreover, the price and the process of service also are playing a great role for clients. Provision of services fully depends on the company's service level (*SL*), which can be quantified. The assessment method of the *SL* is identical to the *LCP* assessment method.

The service level is determined by the formula:

$$SL = X_{1av}^{n_1} \times X_{2av}^{n_2} \times \dots \times X_{nav}^{n_n}, \quad (2)$$

where $X_{1av}, X_{2av}, \dots, X_{nav}$ – the scores of properties that characterize the level of service; n_1, n_2, \dots, n_n – the coefficients of relative importance of the properties of the service level.

The client definitely will compare *LCP*, price, *SL* of services with *LCP*, price and *SL* of the same services by competitors. And on the basis of such comparison the customer will give preference to one or another service.

According to this approach, competitiveness of a tourist company services can be estimated as follows:

$$C/c = \left(\frac{LCP_f}{LCP_c} \right)^\alpha \times \left(\frac{P_c}{P_f} \right)^\beta \times \left(\frac{SL_f}{SL_c} \right)^\gamma, \quad (3)$$

where $\alpha + \beta + \gamma = 1$; C/c – an indicator of competitiveness of the considered service in relation to the service of a competitor; LCP_f, LCP_c – the evaluation (in points) of consumer properties levels of firm's services and the services of competing firms; P_c, P_f – the price of a service of a firm under consideration and the service of com-

peting firms; SLf , SLf – evaluation (in points) of the levels of service of comparable services; α , β , γ – the coefficients of relative importance of LCP , price and SL respectively.

The coefficients α , β , γ are determined by the marketing experts.

The essential meaning of the formula (3) is that the index which was calculated with its help shows the attractiveness for client of the service of the considered firm in relation to the same service of companies-competitors. If the value parameter is equal to one, the estimated service of considered company has equal competitiveness with the service of comparable competitors. If the indicator of competitiveness is greater than 1, then the service of the considered company is more competitive than service of competitors. If less than 1 the service is less competitive.

Key research findings. From the formula (3), the basic directions of competitiveness are the following: technical, economic, organizational.

Technical direction is connected with the improvement of the level of availability, reliability, consistency, improvement of company's confidence, a clear understanding of customer needs, reducing of the risk and conditions improvement during service provision. The economic trend is mainly the pricing policy. Although in the service sphere, the consumer price index is not so essential, however, at the market of tourist services we can observe a hidden price competition and price is important for customers in the process of choosing a service.

Organizational direction is connected with the process of consumption, during which customers come in contact with staff of a company. Despite the fact that tourism companies are trying to achieve high degree of customer satisfaction, we cannot forget about the proportion of costs and results. The philosophy of the company must include the achievement of a high degree of satisfaction within available resources. There is a great variety of options, methods and techniques to enhance the competitiveness of services, starting from the quality of service improving and ending with the choice at the market.

Practical implementation requires certain efforts and costs. The effectiveness of these efforts and costs will be also different. Any action needs to be justified, especially economically (Nurmaganbetov et al., 2003).

As an example, let's consider such tourist companies service as selling tourist trips to the Korgalzhyn Lake. In order to assess the services competitiveness which are provided by the tourist company "Sayat", there was the need for conducting some marketing research. It has shown that among competitors there are travel agencies which offer their services on the market. Among them – JSC "Akmolaturist", "Astana Best Travel", "Baiterek Travel", "Horizon" and others.

The choice of this service was predetermined by the fact that the development of domestic tourism should be a priority in the policy of every travel company.

The experts from the tourist company "Sayat" and from other Astana's travel companies were involved in the evaluation process.

The expert evaluation of LCP of the service on the tours sales to the Korgalzhyn Lake, the average score of the service characteristics by considered firm (on the scale from 0 to 10), and services by companies-competitors obtained by an expert and the values of the relative importance coefficients are shown in Table 1.

Table 1. Estimation of the levels of the consumer services of the tours sale to Korgalzhyn Lake

#	Indicators that characterize the level of consumer service properties	«Sayat» Ltd	Company-competitor	The coefficient of the relative importance of the indicators
1	Level of availability	4.0	4.5	0.18
2	Company reputation	7.8	8.2	0.17
3	Knowledge	8.5	9.0	0.14
4	Reliability	8.3	8.9	0.16
5	Safety	5.8	6.9	0.19
6	Tangibility	5.0	7.6	0.16
8	Level of consumer properties	6.35	7.19	1.00

Source: Created by the authors after the experts' evaluation (www.orexca.com).

According to Table 1 and formula (1), LCP of the service on the tours sales to the Korgalzhyn Lake are:

- for the service of "Sayat" Ltd – 6.35;
- for the services of companies-competitors – 7.19.

The price of this service at the "Sayat" Ltd is 60000 KZT, average price on the same service by competitors is 65000 KZT.

The experts' evaluation of the service level and the average estimation of the same indicators of the companies-competitors are provided in Table 2.

Table 2. Expert assessments of the customer service levels

#	Indicators that characterize the level of service	«Sayat» Ltd	Company-competitor	The coefficient of the relative importance of the indicators
1	Staff competence	6.9	7.0	0.3
2	The level of communication	8.3	7.3	0.1
3	Courtesy	7.5	7.1	0.3
4	Employee reaction	7.0	6.0	0.3
6	Service level	7.02	6.72	1.0

Source: Created by the authors after the experts' evaluation (www.orexca.com).

According to Table 2 and formula (2) the calculated levels of service for "Sayat" Ltd and its competitors are the following: $SLf = 7.02$; $SLc = 6.72$.

Then, we must determine the level of service competitiveness of "Sayat" Ltd for the tours sale to the Korgalzhyn Lake towards the service of competing firms by formula (3).

According to the experts evaluation, the coefficients of relative importance of individual components of service competitiveness were defined as follows: $\alpha = 0.35$; $\beta = 0.24$; $\gamma = 0.41$.

After calculating of competitiveness by the formula (3) we found that the coefficient of competitiveness $CCf/c = 0.95$. This means there is a lack of attractiveness for customers of the "Sayat" Ltd service in comparison with the same service of competing firms. Although, the price for the service suggested by "Sayat" is lower, compared to the prices of competing firms, the company must pay more attention to consumer properties of the service and to the process of customer service.

As a result of the competitiveness analysis for "Sayat" Ltd, it is recommended to develop a package of measures aimed to improve the competitiveness of the company in the occupied segment of the domestic tourism market.

Moreover, for more efficient development of domestic tourism, company should refer to the differentiation strategy – focus on the first places by the level of service,

product quality, technology, service, etc. at the domestic tourism market of Kazakhstan. Within the strategy of differentiation, "Sayat" Ltd should pay attention to the creation of its own recreation base in different resort areas of Kazakhstan. With its head office in Astana, it can build and develop the recreation center at the Borovoe resort, moreover, since the company has the branch in Pavlodar, other recreation center should be build and developed on the territory of the Bayanaul resort.

Of course, the existing base on the Korgalzhyn Lake is a significant advantage, because the company can offer domestic product to tourists. However expansion of the network of its own resorts will help "Sayat" Ltd satisfy customers' need inside the country.

Therefore, it has to be underlined that current conditions provide wide opportunities for satisfaction of requirements of Kazakhstan in different tourist services. Moreover, it is possible to consider internal tourism as one of the most important activity spheres of the modern economy targeted at the satisfaction of the people's need and increasing the quality of their lives.

Conclusions. We evaluated the competitiveness of tourist companies' services on the example of tours sales. In the result of the study by the expert estimates method, we have developed the most effective ways for tourist companies, which will be able to force the improvement of the tourist services competitiveness. The results of this study might be important for tourist companies to improve competitiveness, meet consumer demand and maximize profits.

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КНИЖКОВИЙ СВІТ



СУЧАСНА ЕКОНОМІЧНА ТА ЮРИДИЧНА ОСВІТА
 ПРЕСТИЖНИЙ ВИЩИЙ НАВЧАЛЬНИЙ ЗАКЛАД
НАЦІОНАЛЬНА АКАДЕМІЯ УПРАВЛІННЯ

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Має гриф підручника від МОН України.

У даному підручнику викладено матеріал, який дає системне уявлення щодо менеджменту. Комплекс представлених навчальних матеріалів стосується відносин управління на макро- та мікрорівні економічної системи, що дозволяє сформувати сутнісне бачення щодо менеджмент-взаємозв'язків різноманітних видів діяльності. У цілому викладений матеріал суттєво поширює теоретичні і методичні уявлення щодо менеджменту.

Підручник включає теоретичні засади менеджменту, історію його виникнення і розвитку, форми і методи документообороту при здійсненні управлінської діяльності, основи операційного менеджменту, розкриває нові тенденції у розвитку стратегічного менеджменту. Містить також менеджмент-практикум щодо основних засад управління.

Призначений для студентів вищих навчальних закладів, викладачів, аспірантів, а також всіх тих, хто цікавиться питаннями управління.