

DOI 10.52260/2304-7216.2026.3(64).37
UDC 338.48
SRSTI 06.71.57

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THE ROLE OF DESTINATION MANAGEMENT ORGANIZATIONS IN TOURISM PUBLIC–PRIVATE PARTNERSHIPS IN KAZAKHSTAN

This study examines the role of Destination Management Organizations (DMOs) in facilitating public–private partnerships (PPPs) within Kazakhstan's tourism sector in the context of a transitional economy. The study focuses on the institutional and relational conditions that shape DMO–stakeholder interaction, with particular attention to stakeholder coordination, institutional constraints, and power relations. Primary data were collected through 14 semi-structured interviews with representatives of public tourism authorities, tourism development organisations, business associations, private tourism enterprises, and tourism experts. The data were analysed using thematic analysis. The findings indicate that DMOs perform an important intermediary role by facilitating communication, coordinating stakeholders, supporting tourism initiatives, and connecting public authorities with private-sector actors. However, their capacity to influence strategic decision-making is constrained by limited institutional authority, administrative barriers, resource dependence, and the concentration of decision-making power within public institutions. The findings therefore distinguish between the coordination role of DMOs and their formal decision-making authority within the tourism governance system. The study contributes to the literature by examining how institutional capacity and power relations shape the role of DMOs in tourism PPPs in a transitional economy.

Keywords: destination management organizations; public-private partnerships; tourism governance; tourism economics; stakeholder collaboration; institutional capacity; investment attraction; Kazakhstan.

Кілт сөздер: дестинацияларды басқару ұйымдары, мемлекеттік-жеке иелік әріптестік, туризмді басқару, туризм экономикасы, мүдделі тараптардың ынтымақтастығы, институционалдық әлеует, инвестицияларды тарту, Қазақстан.

Ключевые слова: организации по управлению туристскими дестинациями, государственно-частное партнерство, управление туризмом, экономика туризма, сотрудничество заинтересованных сторон, институциональный потенциал, привлечение инвестиций, Казахстан.

JEL Classification: Z32, Z38, L32; P21

Introduction. Public–private partnerships (PPPs) have become an important governance mechanism for mobilising public and private resources for tourism development. Through cooperation between government authorities, private businesses, investors, and other tourism stakeholders, PPPs can facilitate the development of tourism infrastructure, services, attractions, and destination management initiatives. Such partnerships can combine resources and capabilities that may not be available to either the public or private sector independently. In PPP arrangements, private partners may contribute financial resources, managerial expertise, operational capabilities, and innovation, while public authorities provide institutional support, regulatory frameworks, and alignment with broader tourism development objectives. However, PPP outcomes are shaped not only by contractual arrangements but also by institutional capacity, the distribution of responsibilities, stakeholder interests, and the allocation of decision-making authority.

In order to create well-coordinated destination strategies and a good investment environment, coordination of the entire organization is necessary. But in practice, coordination is often hampered by fragmented administrative powers, diverging targets, ineffective decision-making processes and weak mechanisms. These hurdles aren't only when cooperation is happening but also when the community is working together to achieve the goals and pool resources in the framework of the existing institutional structure. As intermediaries between state and private commercial entities, DMOs play an important role. Beyond destination promotion, they also have the capacity to conduct dialogue, form joint ventures and

drive collective action. Tourism development requires interaction among a wide range of stakeholders, including government authorities, Destination Management Organizations (DMOs), private tourism enterprises, investors, and industry associations. Effective coordination among these actors is important for developing integrated destination strategies and creating conditions conducive to tourism investment. However, coordination may be constrained by fragmented administrative responsibilities, diverging institutional priorities, complex decision-making processes, and limited mechanisms for stakeholder participation.

Existing research has examined PPPs, stakeholder collaboration, and destination governance from various perspectives. However, less attention has been paid to how DMOs operate within power relations between public authorities and private tourism actors and how these relations influence stakeholder collaboration and decision-making. The research problem addressed in this study therefore concerns the insufficient understanding of the institutional and relational factors that shape the role of DMOs in public–private cooperation in Kazakhstan’s tourism sector.

As intermediaries between public authorities and private tourism actors, DMOs can play an important role in facilitating communication, stakeholder coordination, destination development, and collective action. However, the extent of their influence depends on their institutional mandate, regulatory position, organisational resources, and relationships with other stakeholders. While the literature on DMOs and tourism governance is extensive, the role and institutional capacity of DMOs in facilitating public–private partnerships remain insufficiently examined in transitional and post-transition economies. This gap is particularly relevant to Kazakhstan, where tourism governance structures and PPP mechanisms continue to evolve.

The aim of the study is to examine how Destination Management Organizations contribute to stakeholder coordination and the development of public–private partnerships in Kazakhstan’s tourism sector. To achieve this aim, the study addresses the following research questions:

RQ1. What role do DMOs play in coordinating tourism stakeholders in Kazakhstan?

RQ2. What institutional factors facilitate or constrain the ability of DMOs to support tourism PPPs?

RQ3. How do power relations between public and private stakeholders influence the role of DMOs in tourism governance and PPP development?

The study adopts a qualitative case study design. Primary data were collected through 14 semi-structured interviews with stakeholders involved in tourism governance, development, investment, and public–private cooperation in Kazakhstan. The interview data were analysed using thematic analysis.

Primary data were collected through semi-structured interviews with stakeholders possessing relevant professional experience in tourism governance, investment, tourism development, or public–private cooperation. Participants were selected through purposive sampling to ensure that the study included individuals with direct knowledge and professional experience relevant to tourism governance, tourism development, investment, or public–private cooperation. The participants represented public tourism authorities, tourism development organizations, business associations, private tourism enterprises, and tourism industry experts. In total, 14 semi-structured interviews were conducted. Due to the geographical distribution of participants across Kazakhstan, interviews were conducted online using video-conferencing platforms, including Zoom and Microsoft Teams. Interviews lasted approximately 40–60 minutes and followed a semi-structured interview guide aligned with the research objectives.

The interview guide covered four principal areas: participants’ experiences of tourism governance and public–private cooperation; perceptions of the role of DMOs in coordinating tourism stakeholders; opportunities and challenges associated with tourism PPPs; and institutional factors influencing stakeholder cooperation and decision-making. Interviews were conducted in Kazakh or Russian, according to participants’ preferences, and subsequently transcribed for analysis. Participants’ identities were anonymised and replaced with identification codes to maintain confidentiality.

Attention was given to stakeholder coordination, the institutional role of DMOs, power relations between public and private actors, and institutional constraints affecting PPP development during the interview. This analytical approach enabled the study to identify patterns across stakeholder perspectives while also capturing differences in how public and private actors understand governance, collaboration, and decision-making in Kazakhstan’s tourism sector.

Literature review. Tourism has become an important driver of economic growth, regional development, and destination competitiveness. Contemporary tourism research emphasizes that sustainable destination development depends on effective governance systems capable of coordinating the interests of

multiple stakeholders, including public authorities, private businesses, local communities, and civil society organizations [1, 6].

Previous studies indicate that PPPs enable governments to combine public resources with private-sector expertise and innovation, thereby enhancing tourism competitiveness and supporting long-term destination development [4, 7]. In Kazakhstan, PPPs have been increasingly promoted as an instrument for implementing tourism development strategies and expanding tourism infrastructure [13,14].

Destination Management Organizations (DMOs) play a central role in coordinating tourism stakeholders and facilitating collaboration within destinations. The literature identifies DMOs as organizations responsible for destination planning, marketing, stakeholder engagement, product development, and investment promotion [2, 3]. Their intermediary position enables them to strengthen cooperation between public institutions and private tourism enterprises while supporting integrated destination management.

The effectiveness of Destination Management Organizations largely depends on the quality of stakeholder relationships and institutional capacity. Previous studies demonstrate that trust, cooperation, and continuous communication among stakeholders significantly improve collective decision-making and destination competitiveness [8]. At the same time, governance effectiveness may be constrained by unequal power distribution among tourism actors. Research has shown that public authorities often retain dominant decision-making authority, limiting the influence of private-sector stakeholders in partnership arrangements [5, 11, 12].

Recent tourism governance research has increasingly focused on institutional arrangements that facilitate stakeholder collaboration and sustainable destination management. Existing studies have examined governance models, collaborative networks, and partnership mechanisms across various tourism destinations [6, 9, 10]. Nevertheless, empirical evidence regarding the governance role of DMOs in facilitating public–private partnerships within transitional economies remains limited.

The governance role of DMOs in strengthening tourism PPPs under conditions of institutional transformation has not been sufficiently explored. This study addresses this research gap by investigating how Destination Management Organizations facilitate stakeholder collaboration and contribute to the development of public–private partnerships in Kazakhstan's tourism sector.

DMOs act as intermediary institutions that help connect public authorities and private stakeholders within the tourism governance system [15]. Through stakeholder coordination and strategic planning processes, DMOs facilitate collaboration between actors involved in tourism development initiatives. Power relations represent an important dimension of tourism governance within PPP arrangements. The distribution of decision-making authority, access to resources, and institutional influence may shape how tourism development initiatives are implemented. In transitional economies, government institutions often retain strong influence over tourism policy and development strategies, while private sector actors participate within institutional frameworks established by public authorities.

Main part. The interaction between DMOs, PPP mechanisms, and power relations ultimately influences tourism development outcomes. Effective collaboration between stakeholders may contribute to improving destination competitiveness, attracting tourism investment, and supporting sustainable tourism development. Conversely, imbalanced power relations or weak institutional coordination may limit the effectiveness of tourism partnerships.

In recent years, national tourism policy has aimed to increase the sector's contribution to regional development, employment creation, and investment attraction. Figure 1 illustrates the dynamics of investment in fixed capital in Kazakhstan's tourism sector during 2019–2025. The data indicate an overall increase in investment activity over the period. In 2019, investment in fixed capital in the tourism sector amounted to KZT 502 billion, compared with KZT 947.6 billion in 2024 and KZT 1,256.9 billion in 2025. Thus, between 2019 and 2025, investment increased by KZT 754.9 billion, representing an increase of approximately 150.4% or 2.5 times the 2019 level. In 2025 alone, investment increased by approximately 32.6% compared with 2024. The observed increase indicates a substantial expansion of investment activity in Kazakhstan's tourism sector and provides an important economic context for the development of tourism infrastructure and public–private cooperation.

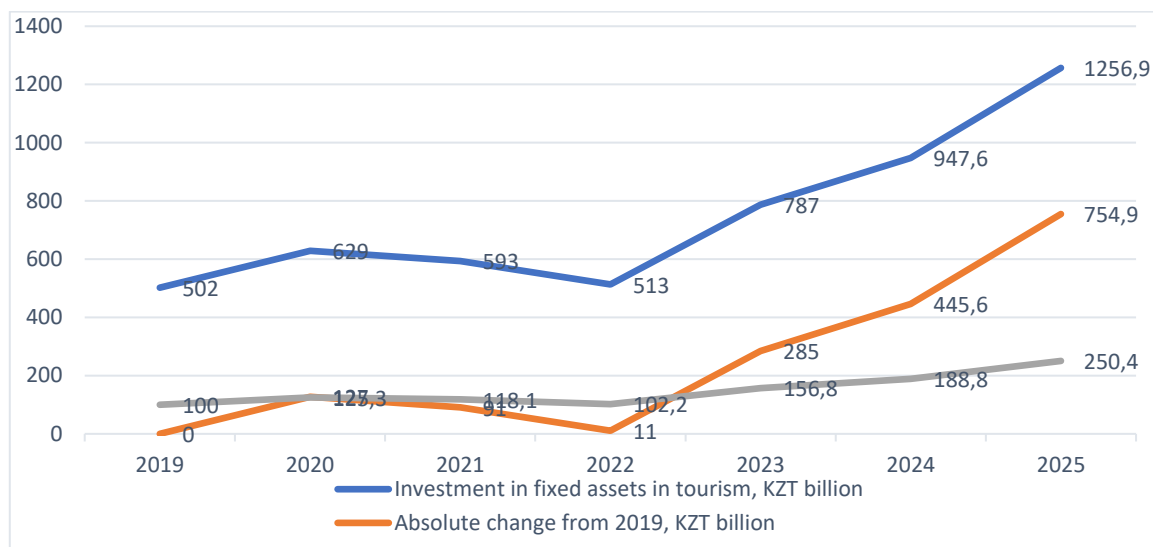


Figure – 1. Dynamics of investments in fixed capital in Kazakhstan's tourism sector, 2019–2025

**compiled by the authors based on the data of the source [13].*

As shown in Figure 2, the total number of PPP and concession agreements in Kazakhstan increased from 1,140 in 2022 to 1,257 in 2025, while the number of operating projects decreased from 805 to 697 over the same period. These indicators cover PPP and concession projects across different sectors of the Kazakhstani economy and therefore should not be interpreted as direct evidence of the performance or challenges of tourism PPP projects. Rather, they provide contextual information on the broader institutional environment in which tourism PPPs operate.

The national PPP statistics also distinguish between different stages of the contractual lifecycle. According to the latest available national PPP statistics, 411 projects had been completed and 149 agreements had been terminated. These categories should be considered separately from operating projects. In particular, the completion or expiry of a PPP agreement does not necessarily indicate project failure, whereas termination represents a different contractual outcome. Therefore, changes in the number of operating projects cannot, by themselves, be interpreted as evidence of PPP inefficiency. Accordingly, national PPP indicators are used in this study only to characterise the broader institutional environment for public–private cooperation in Kazakhstan. They are not treated as direct measures of the performance of tourism PPPs. Sector-specific conclusions regarding stakeholder interaction, institutional constraints, and power relations in tourism PPPs are instead based on the qualitative evidence obtained through 14 semi-structured interviews and analysed using thematic analysis.

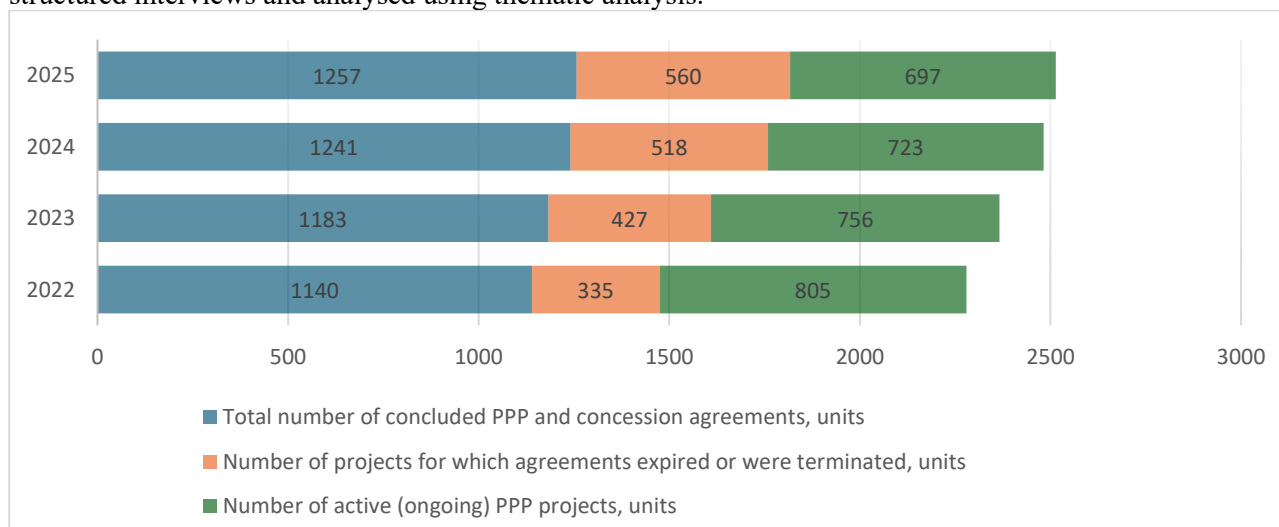


Figure – 2. Public–private partnership and concession agreements and operating projects in Kazakhstan, 2022–2025

**compiled by the authors based on official PPP statistics.*

The growth in tourism investment provides an important economic context for examining public–private cooperation in Kazakhstan. However, investment growth alone does not indicate how effectively public and private stakeholders interact or how decision-making authority is distributed within tourism partnerships. These institutional and relational dimensions were therefore examined through the qualitative component of the study. By acting as intermediary institutions, DMOs can reduce transaction costs between public and private actors, improve communication regarding investment opportunities, and support the coordination of tourism development priorities (Figure-3). They may also help reduce information asymmetries by promoting destinations, disseminating market data, and facilitating dialogue among stakeholders. From this perspective, the contribution of DMOs to tourism PPPs extends beyond marketing and includes broader economic governance functions.

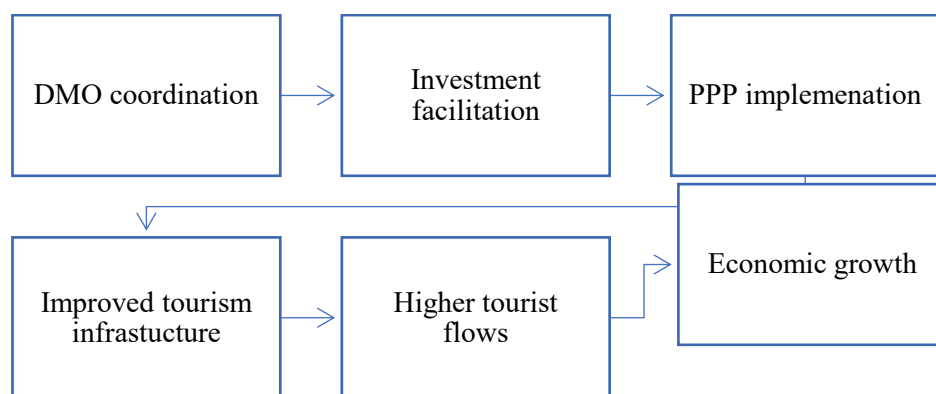


Figure – 3. **Economic role of DMOs in tourism PPP development**

**developed by the authors based on the study findings*

The case of Kazakhstan also demonstrates the importance of regional differentiation in tourism economics. While some destinations benefit from stronger infrastructure and better market access, others remain constrained by weak investment appeal and limited institutional support. This suggests that the development of tourism public-private partnerships (PPPs) should be addressed not only as a national policy issue but also as a regional economic challenge. Destination Management Organizations (DMOs) are critical for overcoming regional development imbalances as these organizations help local development by identifying high-priority locations, helping local spatial growth strategy development and matching capital investments to existing territorial assets. Tourism-based public-private partnerships (PPPs) in Kazakhstan are promoting destination development through attraction of capital, development of tourism infrastructure and employment in the local economy. But to achieve these results more than just financial capital is needed; good institutional governance, cross-stakeholder engagement and proactive DMO leadership are equally important. Thus, tourism PPPs should not be just physical infrastructure-based on capital but should also be a pillar of a larger institutional governance framework and also be seen as key to building the resilience of destinations and raising the competitiveness of the region.

Data collection and analysis. Primary data were collected through 14 semi-structured interviews conducted between January 2026 and May 2026 with stakeholders possessing relevant professional experience in tourism governance, tourism development, investment, or public–private cooperation in Kazakhstan. Participants were selected through purposive sampling to ensure that the study included individuals with direct knowledge and professional experience relevant to tourism governance, tourism development, investment, or public–private cooperation. The inclusion criteria were: (1) professional involvement in tourism governance, tourism development, investment, or public–private partnership-related activities; (2) direct experience of interaction with public or private tourism stakeholders; and (3) sufficient professional knowledge to discuss the role of DMOs and tourism partnerships.

The 14 participants represented 5 representatives of public tourism authorities, 2 representatives of tourism development organisations/DMOs, 3 representatives of business associations, 2 representatives of private tourism enterprises, and 2 tourism experts. To protect participants' confidentiality, anonymised identification codes (P01–P14) were assigned to all interviewees.

Interviews were conducted online using video-conferencing platforms, including Zoom and Microsoft Teams. Each interview lasted approximately 40–60 minutes and followed a semi-structured interview guide based on the research questions and the literature on tourism governance, stakeholder collaboration, DMOs, and PPPs.

Thematic analysis was conducted in several stages. First, interview transcripts were read repeatedly to ensure familiarity with the data. Second, initial codes were assigned to statements relating to stakeholder coordination, the role of DMOs, PPP development, institutional constraints, and decision-making. These analytical areas were informed by the research questions and relevant literature and therefore constituted an initial coding framework rather than predetermined themes. Third, additional codes were generated inductively from participants' responses when issues not anticipated in the initial framework emerged. Fourth, related codes were grouped into broader categories and reviewed across the interview dataset. Finally, the resulting themes were compared across stakeholder groups, particularly between public-sector and private-sector participants, to identify areas of convergence and divergence.

The final thematic structure comprised four interrelated themes: (1) the coordinating role of DMOs, (2) stakeholder collaboration, (3) institutional constraints affecting PPP development, and (4) power relations within public–private partnerships.

Table – 1

Profile of Interview Participants by Stakeholder Group

Stakeholder group	Number	Codes
Public tourism authorities	5	P01–P05
Tourism development organisations/DMOs	2	P06–P07
Business associations	3	P08–P10
Private tourism enterprises	2	P11–P12
Tourism experts	2	P13–P14
Total	14	P01–P14

**compiled by the authors based on the interview data*

Results. The interview data provide empirical evidence of how Destination Management Organizations (DMOs) operate within Kazakhstan's tourism sector. Thematic analysis identified four integrated and interrelated themes concerning the role of DMOs in Kazakhstan's tourism PPP landscape: (1) the coordinating role of DMOs, (2) stakeholder collaboration, (3) institutional constraints affecting PPP development, and (4) power relations within public–private partnerships. Together, these themes illustrate the intermediary functions performed by DMOs while also highlighting institutional constraints and asymmetries in decision-making authority within tourism governance.

Coordinating role of DMOs. A recurring theme across the interviews was the intermediary role of Destination Management Organizations (DMOs) in connecting public authorities, tourism businesses, business associations, and other stakeholders involved in destination development. Participants described DMOs as facilitating communication, disseminating information, supporting tourism initiatives, and creating opportunities for interaction among stakeholders. Their role was therefore perceived as extending beyond destination promotion to include the coordination of stakeholders involved in tourism development.

In the Kazakhstani context, Kazakh Tourism was frequently referred to as an important institutional actor facilitating interaction between public authorities and tourism businesses. Participants associated its activities with destination promotion, tourism development initiatives, industry meetings, investment-related activities, and stakeholder engagement. These activities were described as providing opportunities for tourism actors to exchange information, establish professional contacts, and coordinate activities related to destination development.

The interviews also highlighted the role of DMOs in connecting stakeholders with different institutional interests and responsibilities. Participants described situations in which DMOs acted as an intermediary between government institutions and tourism businesses by communicating information, facilitating contacts, and supporting joint initiatives. As one participant explained, *“The DMO brings together representatives from government and business, so we can communicate with each other and discuss issues related to tourism development”* (P08). This account illustrates how the intermediary function of DMOs is experienced at the stakeholder level, particularly through their role in facilitating

communication and creating opportunities for interaction among actors who may otherwise have limited direct contact.

The coordinating function of DMOs was also associated with the organisation of meetings, forums, consultations, and other stakeholder-engagement activities. Such mechanisms provide channels through which tourism businesses and other stakeholders can communicate their interests and obtain information about public initiatives. However, participants indicated that the existence of coordination mechanisms does not necessarily mean that DMOs or participating stakeholders have equivalent influence over strategic decisions.

A distinction therefore emerged between the coordination function of DMOs and their formal decision-making authority. Participants described DMOs as actively facilitating communication and stakeholder interaction, while strategic policy priorities, regulatory decisions, and the allocation of public resources remained largely within the remit of public authorities. As one participant noted, *“The DMO can bring stakeholders together and coordinate our discussions, but it does not make the final decisions. The main decisions are still made by the relevant government authorities”* (P13). This suggests that DMOs may facilitate the process through which stakeholders interact without necessarily possessing the statutory authority to determine the final direction of tourism policy or investment decisions.

The findings further indicate that the effectiveness of the coordinating role depends on the institutional position and resources available to DMOs. Participants referred to the importance of organisational capacity, access to information, relationships with public authorities, and the ability to maintain communication with private-sector stakeholders. Consequently, the interviews portray DMOs as intermediary and coordinating actors within Kazakhstan’s tourism governance system, while their capacity to influence strategic priorities is shaped by the broader institutional distribution of authority.

Overall, the findings indicate that the primary contribution of DMOs identified by participants lies in connecting stakeholders, facilitating communication, and supporting coordination rather than exercising formal decision-making authority. This distinction provides an important basis for understanding the subsequent findings concerning stakeholder collaboration, institutional constraints, and power relations within tourism PPPs.

Stakeholder collaboration. The second theme concerned the nature and extent of stakeholder collaboration in Kazakhstan’s tourism sector. Participants described tourism development as involving multiple actors, including public authorities, tourism businesses, business associations, investors, destination management organisations, and other tourism-related institutions. In this context, collaboration was understood not simply as communication between stakeholders, but as the extent to which different actors could participate in discussions, exchange information, and contribute to tourism development initiatives.

Participants identified meetings, forums, consultations, and joint initiatives as important mechanisms for maintaining interaction between stakeholders. These mechanisms provided opportunities for tourism businesses and other private-sector actors to communicate their concerns, obtain information about government initiatives, and establish contacts with relevant institutions. However, the existence of such mechanisms did not necessarily ensure that all stakeholder groups had equal opportunities to influence decisions.

Several participants, including representatives of business associations and private tourism enterprises (P10–P11), referred to differences. In particular, smaller enterprises were described as having fewer opportunities or resources to engage consistently in institutional discussions concerning tourism development and investment. *“For small businesses, it is not always easy to participate in these discussions. They have their own daily work and limited resources, so they cannot always attend meetings or be involved in the process”* (P10). This suggests that formal opportunities for stakeholder participation may coexist with differences in the capacity of stakeholders to make their interests visible within tourism governance processes.

The interviews also indicated that collaboration was affected by the institutional position of the stakeholders involved. Participants referred to administrative procedures, access to relevant information, and relationships with public authorities as factors shaping the quality of public–private interaction. *“It is easier to work with government when you already know the people and understand how the process works. Sometimes information does not reach businesses directly, and this makes cooperation more difficult”* (P11). These accounts indicate that collaboration depends not only on the availability of communication

platforms but also on stakeholders' ability to access decision-making processes and maintain effective institutional relationships.

Importantly, the findings distinguish between stakeholder interaction and substantive participation in decision-making. Participants could communicate with public authorities, attend meetings, or contribute to consultations without necessarily having a direct influence on final policy, regulatory, or investment decisions. Thus, stakeholder collaboration appeared to be stronger at the level of information exchange and coordination than at the level of strategic decision-making.

Overall, the interviews suggest that stakeholder collaboration in Kazakhstan's tourism sector is supported by established mechanisms of communication and coordination, but that participation remains uneven across stakeholder groups. The findings therefore highlight the importance of examining not only whether stakeholders are included in collaborative processes, but also the extent to which they can influence decisions. This distinction provides a link between stakeholder collaboration and the institutional constraints and power relations identified in the following themes.

The interviews further indicate that PPPs are increasingly viewed as a mechanism for mobilizing private investment in tourism infrastructure and services. Participants referred to projects involving accommodation, recreational facilities, and other tourism-related services. In these arrangements, PPPs can combine public resources and institutional support with private-sector capital, expertise, and operational capabilities.

From the perspective of destination management, this creates a potential role for DMOs in connecting investment proposals with local tourism priorities. DMOs may help identify destination needs, communicate these priorities to potential investors, and facilitate interaction between investors and public authorities. However, the extent to which they can perform this role depends on whether they have sufficient institutional authority and resources.

The findings indicate that DMOs play an important but institutionally constrained role in Kazakhstan's tourism PPP landscape. Their contribution is primarily associated with stakeholder coordination, communication, relationship-building, and the facilitation of cooperation between public and private actors. However, their capacity to influence high-level strategic and policy decisions remains limited by their institutional position and the distribution of decision-making authority within the tourism governance system. Tourism PPPs should therefore be understood not only in terms of capital mobilisation and project financing, but also in terms of institutional capacity, administrative arrangements, stakeholder coordination, and the distribution of decision-making power. Within this framework, public authorities retain responsibility for regulatory decisions, public resources, and other functions within their statutory mandate, while private-sector actors may contribute financial resources, managerial expertise, operational capabilities, or services depending on the specific partnership arrangement.

Institutional constraints affecting PPP development. However, participants also highlighted several challenges associated with the implementation of PPP initiatives in tourism development. One of the most frequently mentioned challenges concerns bureaucratic procedures and administrative barriers that may slow down the implementation of tourism investment projects. In addition, some respondents noted that private investors may perceive tourism investment projects as relatively risky due to market uncertainties and regulatory complexities.

Strengthening cooperation between public authorities and private tourism businesses may help create more favourable conditions for tourism investment and project implementation (Figure-4).

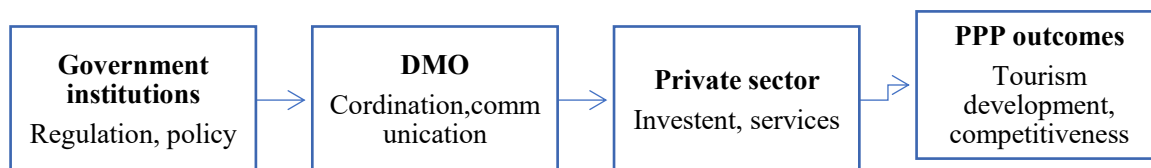


Figure – 4. **DMO–PPP interaction model in tourism governance**

**developed by the authors based on stakeholder analysis and research findings.*

Power relations within public–private partnerships. Another important theme identified in the interviews relates to power relations between stakeholders involved in tourism PPP initiatives.

While private-sector stakeholders may contribute financial resources, managerial skills, operational expertise, or services depending on the partnership arrangement. When both public and private actors participate actively in decision-making processes, partnerships may become more collaborative and responsive to market conditions. Strengthening institutional mechanisms that encourage stakeholder participation may therefore improve the governance of tourism PPP initiatives.

This finding reinforces the argument that governance structures in transitional economies remain state-centered, where public institutions retain strategic control over development processes (Hall, 2011).

The findings of this study also highlight several institutional challenges affecting tourism governance and PPP development in Kazakhstan. Participants identified issues such as limited stakeholder coordination, bureaucratic procedures, and institutional fragmentation as potential barriers to effective tourism development. Respondents also pointed to Kazakhstan's considerable potential for tourism development, particularly because of its natural landscapes, cultural heritage, and increasing interest from international visitors. At the same time, participants stressed that this potential cannot be fully realized without stronger institutional arrangements for cooperation and investment.

Nine of the 14 participants argued that DMOs could make a stronger strategic contribution to tourism development if they were provided with broader statutory mandates and adequate resources. They added that strengthening the DMO's status would improve cross-stakeholder alignment, investment attraction efforts, and long-term strategic stability in regional destination planning. These findings are in line with some of the literature on tourism governance. As Hall argues, governance structure determines the architecture and organization of destination development, and Dredge and Jamal emphasise the importance of collaborative governance and stakeholder participation in tourism policy-making. The present findings indicate that such collaborative mechanisms exist in Kazakhstan, but that stakeholders' influence over strategic decision-making remains uneven. The findings of this study further indicate that although DMOs in Kazakhstan play an important role in the integration of tourism policy, they are structured in an institutional context with asymmetrical decision-making power. Thus, while DMOs are good for cooperating with others, their ability to shape strategic decisions in the context of macro-governance is limited. Qualitative interviews show that there is a structural divide between the role of Destination Management Organizations (DMOs) and the authority of state agencies to do so. At the same time, private-sector involvement varied across partnership arrangements. In the broader PPP framework, private partners may contribute capital, managerial expertise, and operational capabilities; however, the interview evidence suggests that the extent and form of private-sector financial participation differ across tourism initiatives. Some participants described private actors primarily in terms of service provision, operational expertise, and consulting activities, while other accounts referred to private investment as an important component of tourism development projects. Therefore, the findings do not assume a uniform financing model across tourism partnerships but rather indicate variation in the degree and form of private-sector involvement. The findings are consistent with Beritelli and Laesser's assumption of power concentration in destination governance networks, but distinct from the much more egalitarian notion of stakeholder engagement of Bramwell and Lane. Although collaborative structures exist in Kazakhstan, decision-making authority remains asymmetrically distributed among stakeholders. Empirical finding: Participants described public authorities as retaining substantial influence over tourism policy, priority setting, and the allocation of public resources.

Interpretation: This indicates an asymmetry between the coordinating role of DMOs and the formal decision-making authority of public institutions.

Institutional constraints were another recurring issue in the interviews. Participants referred to bureaucratic procedures and weaknesses in coordination as factors that can slow or complicate PPP implementation. This observation is consistent with the broader literature on tourism governance, which emphasizes the importance of institutional arrangements and coordination in tourism development [10]. At the same time, the intermediary role attributed to DMOs aligns with the literature on destination management, which recognizes DMOs as important actors in coordinating tourism stakeholders and destination-related activities [2].

Conclusion. This study investigates the role of Destination Management Organizations (DMOs) in facilitating public–private partnerships across Kazakhstan's tourism sector. Based on 14 semi-structured interviews with key tourism-sector stakeholders, the study examines how DMOs operate within

Kazakhstan's tourism governance system and how stakeholder and power relations shape destination governance and collaboration. The findings indicate that Destination Management Organizations (DMOs) are an important link between public authorities, private businesses, and other sectors. However, a fundamental disconnect exists as the scope of their coordination role does not lead to a statutory authority in the form of high-level policy-making. Strategic policy and investment decisions were described by participants as remaining largely within the remit of public authorities. Public-private partnerships (PPPs) may provide a structure that enables a public asset to be leveraged with private capital, operational know-how, and management skills. But the success of these joint ventures depends on the institutional dynamic that governs the development and execution of such projects. Systems-level vulnerabilities, such as bureaucratic complexity, jurisdictional boundaries, inter-agency coordination, and asymmetric stakeholder involvement, often hinder PPP structures from operating and driving destination growth.

An important implication of these findings is that strengthening tourism PPPs requires attention not only to investment mechanisms but also to the governance structures surrounding them. For DMOs to make a stronger contribution, their responsibilities and authority need to be more clearly defined, while mechanisms for private-sector and other stakeholder participation should provide opportunities for substantive input into tourism planning and investment decisions.

From a policy perspective, strengthening the institutional capacity of DMOs could improve coordination between government and tourism businesses. Greater access to resources, clearer mandates, and stronger opportunities for stakeholder participation may allow DMOs to move beyond a primarily facilitating role and contribute more actively to destination planning and PPP development.

The study has several limitations. The analysis is based on stakeholder perspectives within the Kazakhstani context and therefore does not capture all possible views on tourism governance. Future research could incorporate the perspectives of regional authorities, tourism entrepreneurs, investors, and local communities, as well as compare Kazakhstan with other transitional economies. Such comparative research could provide a better understanding of how institutional conditions shape the role of DMOs in tourism PPPs.

Overall, the findings suggest that the development of tourism PPPs in Kazakhstan is closely connected to questions of governance and institutional capacity. The findings indicate that clearer institutional mandates, adequate organisational resources, improved stakeholder coordination, and mechanisms for substantive participation are relevant considerations for the further development of tourism PPP governance in Kazakhstan.

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Ырза Б.Ш., Альмухамбетова Б.Ж., Ыдырыс С.С., Тагманов У.С.

ҚАЗАҚСТАНДАҒЫ ТУРИЗМ САЛАСЫНДАҒЫ МЕМЛЕКЕТТІК-ЖЕКЕШЕЛІК ӘРІПТЕСТІКТЕ ДЕСТИНАЦИЯЛАРДЫ БАСҚАРУ ҰЙЫМДАРЫНЫҢ РӨЛІ

Андатпа

Бұл зерттеуде өтпелі экономика жағдайында Қазақстанның туризм саласындағы мемлекеттік-жекешелік әріптестікті (МЖӘ) дамытудағы дестинацияларды басқару ұйымдарының (DMO) рөлі қарастырылады. Зерттеу DMO мен мүдделі тараптардың өзара әрекеттесуін айқындайтын институционалдық және өзара қарым-қатынас жағдайларына, атап айтқанда, мүдделі тараптарды үйлестіруге, институционалдық шектеулерге және билік қатынастарына бағытталған.

Эмпирикалық деректер туризм саласындағы мемлекеттік органдардың, туризмді дамыту ұйымдарының, бизнес қауымдастықтарының, жеке туристік кәсіпорындардың өкілдері және туризм сарапшыларымен жүргізілген 14 жартылай құрылымдалған сұхбат арқылы жиналды. Алынған деректерді талдау үшін тақырыптық талдау әдісі қолданылды.

Зерттеу нәтижелері Қазақстандағы дестинацияларды басқару ұйымдарының делдалдық және үйлестірушілік маңызды рөл атқаратынын көрсетті. Атап айтқанда, олар мемлекеттік органдар мен жеке сектор өкілдері арасындағы коммуникацияны қамтамасыз етеді, мүдделі тараптардың өзара іс-қимылын үйлестіреді, туристік бастамаларды қолдайды және туризм саласына қатысушылар арасында ынтымақтастық орнатуға ықпал етеді. Сонымен қатар дестинацияларды басқару ұйымдардың стратегиялық шешімдер қабылдауға ықпал ету мүмкіндіктері институционалдық өкілеттіктердің шектеулілігі, әкімшілік кедергілер, ресурстық тәуелділік және шешім қабылдау өкілеттіктерінің мемлекеттік органдарда шоғырлануы салдарынан шектеледі.

Осылайша, зерттеу Қазақстандағы туризмді басқару жүйесінде дестинацияларды басқару ұйымдардың үйлестірушілік рөлі мен шешім қабылдаудағы ресми өкілеттіктері арасындағы айырмашылықты айқындайды. Зерттеу туризмді басқару саласындағы ғылыми әдебиетке өтпелі экономика жағдайында институционалдық әлеует пен билік қатынастарының дестинацияларды басқару ұйымдарының туризм саласындағы мемлекеттік-жекешелік әріптестіктегі рөлін қалай қалыптастыратынын талдау арқылы үлес қосады.

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РОЛЬ ОРГАНИЗАЦИЙ ПО УПРАВЛЕНИЮ ТУРИСТСКИМИ ДЕСТИНАЦИЯМИ В ГОСУДАРСТВЕННО-ЧАСТНОМ ПАРТНЁРСТВЕ В СФЕРЕ ТУРИЗМА КАЗАХСТАНА

Аннотация

В данном исследовании рассматривается роль организаций по управлению туристскими дестинациями (DMO) в развитии государственно-частного партнёрства (ГЧП) в сфере туризма Казахстана в условиях переходной экономики. Исследование сосредоточено на институциональных и взаимоотношенческих условиях, определяющих взаимодействие DMO с заинтересованными сторонами, с особым вниманием к координации участников, институциональным ограничениям и отношениям власти.

Эмпирические данные были получены в результате проведения 14 полуструктурированных интервью с представителями государственных органов в сфере туризма, организаций по развитию туризма, бизнес-ассоциаций, частных туристских предприятий и экспертов в области туризма. Для анализа данных применялся тематический анализ.

Результаты показывают, что в Казахстане DMO выполняют значимую посредническую и координационную функцию, обеспечивая коммуникацию между государственными органами и представителями частного сектора, координируя взаимодействие заинтересованных сторон, поддерживая туристские инициативы и создавая возможности для сотрудничества между участниками туристской отрасли. Вместе с тем их возможности влиять на принятие стратегических решений остаются ограниченными вследствие ограниченных институциональных полномочий, административных барьеров, ресурсной зависимости и концентрации полномочий по принятию решений в государственных органах.

Таким образом, исследование показывает различие между фактической координационной ролью DMO и их формальными полномочиями в системе управления туризмом Казахстана. Полученные результаты расширяют существующие исследования туристского управления за счёт анализа того, каким образом институциональный потенциал и отношения власти определяют роль DMO в государственно-частном партнёрстве в сфере туризма Казахстана в условиях переходной экономики.

