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INTERNATIONAL PRACTICE IN APPLYING ELEMENTS OF TOURISM DIGITAL ECOSYSTEMS

The article targets to revision the practice of digital ecosystem use for the renovation and development of global tourism.

The outcomes of the revision will support to adjust the policy of Kazakhstan while forming an innovative digitalization program for the republic and define significance spheres. Our findings underscore the increasingly significant role that intermediaries play within the tourism sector. Moreover, the appearance of fresh high-tech entities is paving the way for inventive services, injecting a vibrant energy into the market. Nevertheless, the involvement of local stakeholders, such as populations and civic groups, is important to the Kazakhstan tourism industry; their integration into the experiences offered to tourists is indispensable. These insights offer researchers and industry professionals a framework to explore innovative possibilities and the development of specialized niches. Furthermore, these insights serve as a foundation for additional studies on the shifts within the ecosystem, influenced by technological advancements or external factors.

The paper delves into the digitalization trends globally and presents key indices from international rankings to evaluate Kazakhstan's digital economy and its readiness for a digital makeover.

Keywords: digital economy, digitalization, tourism, digital technologies, industry 4.0.

Introduction

The digital economy as a milestone in the development of an economic relations system is characterized by the predominance of knowledge and intangible production. A digital ecosystem is understood as a collection of a significant

amount of stakeholders, information services and business processes which are connected through mutually beneficial agreements («win-win»). Present digital ecosystems are developing both in the format of forming a network around one company or service, and in the format of a marketplace, which is usually represented by a large number of stakeholders.

In the modern development of information and communication technologies (ICT), they are extremely important for the management, access and sharing of data, as well as in ensuring the harmonized interaction of digital ecosystem stakeholders in digital environment, such as the Internet and mobile platforms. Meanwhile, the large amount of heterogeneous data created every day and the growing complexity of software make ICT-enabled systems increasingly complex to design and maintain. Under these circumstances, the concept of «digital ecosystems» emerged and quickly attracted the attention of the computer science community.

Currently, one of the emerging trends in the global tourism sector is the widespread adoption of online technologies, indicating that the evolution of tourism is unfolding within a digital framework. The process of digitalization has indeed encompassed the tourism industry as well. Digitalization in tourism is aimed at making the tourism business not only more flexible, corresponding to modern realities, but also more competitive in modern conditions. Digitalization of the tourism and hospitality helps ensure a best service quality delivery for the consumers and higher incomes for travel company owners.

Materials and methods

Study on the progress of the digital economy problems and digital ecosystems is aimed in the scientific publications of domestic and foreign investigators: Akatkin Yu.M., Karpov O. E., Konyavsky V. A., Yasinovskaya E. D., Andreyeva E. L., Glukhikh P. L., Myslyakova Yu. G., Annenkov A., Gelikhanov I. Z., Yudina T. N., Babkin A.V., Doroshenko S.V., Shelomentsev A. G., Karpinskaya V. A., Kleiner G. B., Kulikova O. M. Suvorova S. D., Onishchenko E. V., Gordienko S.V., Stepanova V. V., Ukhanova A. V., Grigorishchin A.V., Yakhyaev D.B., Styrin E.M., Dmitrieva N. E., Sinyatullina L. Kh., Tikhonova A. D., Adner R., Gawer A., Cusumano M., Hein A., Schreieck M., Riasanow T., Kapoor R., and etc.

The specifics of industry expansion in the frameworks of digitalization and the impact of digital ecosystems on the tourism industry are presented in the works of Arefyev A. S., Arkhipova A. A., Baynazarov N., Bogomazova I. V., Klimova T. B., Garifyanova V. I., Galimova A. M., Dmitrieva D., Kirillova S. A., Makrinova E. I., Sotnik A. P., Khaidarova I. S., Morozova M. A., Morozova N.S., Pirozhnikova S., Sarkisyan K. A., Solovyova N. Some ecosystem concepts described by various scientists in Table 1 are presented.

Summarizing the concepts of digital ecosystems, it can be revealed that the key feature of ecosystems is that they create it plausible to implement the principles of complementarity, in accordance with which joint production and mutual complementarity of different economic entities is carried out, and to obtain services and products that have great use value for customers than the services and products of individual companies.

The methodology of research is based on the fundamentals of systemic, reasonable and tendency analysis of various type information. During the research, the systematization, analysis and synthesis of quantitative data, data from industry organizations, analytics reports, and marketing research were used.

As a result of the synergistic effects from the interaction of stakeholders united in a digital ecosystem, fundamentally new services and products arise due to the complementarity effect. At the same time, during the development of the digital ecosystem, the special characteristics of services and products, such as their timeliness, accessibility, quality, and personalization, gain special significance.

Results and discussion

Over the past 20 years, software development has moved from structured programming to object-oriented programming, and is now moving towards the development of parallelism [1]. The complexity of software has increased significantly through the speedy development of software design technologies. A key challenge in modern computing is the development of systems that solve problems in complex and dynamic environments like the Internet in a scalable and efficient way.

Digital transformation has created highly complex relationships between industry entities and players that can no extensive be clustered into sellers, clients and competitors. Modern scientific sources do not reflect unity in approaches to defining the term «digital economy». In particular, the Supreme Eurasian Economic Council, at an event of the Eurasian Economic Commission related to monitoring the implementation of the digital agenda of the Eurasian Economic Union until 2025, positioned the digital economy as a part of the economy that initiates the processes of production, distribution, exchange, and consumption. Thanks to the use of information and communication technologies, the world economy is going through a stage of digital transformation [2].

The digital economy is characterized by special elements such as the presence of a digital consumer and a digital enterprise, as well as the modification of services and products into digital content. The digital consumer should be characterized by a personalized and interactive experience in purchasing services and products that are based on SMAC technologies: social, mobile, analytical, cloud. The integration of SMAC technologies into the business processes of a digital enterprise is focused

on reducing transaction costs, adapting to transformations in market situations and entering new markets.

Transformational phenomena in digital operations are causing the restructuring of business models of enterprises aimed at the use of artificial intelligence, cognitive computing and the Internet of things. Transformations of this type are usually accompanied by a modification of the paradigm of thinking for all levels of government and corporate management and the behavior of consumers of services and products [3].

2022 was characterized by a decrease in value for platform businesses. This trend can be explained by the fall of the American stock market of advanced technologies and geopolitical factors [4, p. 12].

The Kazakhstan market of technological enterprises can currently be characterized by development in the format of digital ecosystems. In the process, there is an increase in areas and product lines, largely due to financial services.

Digitalization of Kazakhstan business can be assessed at the initial stage of development. This conclusion is proven by analytical data: e-commerce so far accounts for only 6 % of total retail turnover (for example: in China the figure is 28 %, and in the USA it exceeds 15 %) [4, p. 8].

McKinsey's Ecosystem Enterprise Forecast projects a potential global revenue of 60 trillion USD by 2025. Therefore, according to the forecast, the potential increase in the share of ecosystem enterprises in the global economy by 2025 will be from 1-2 % to 30 % of global GDP. At the same time, domestic digital ecosystems can be characterized by unrealized development potential, which greatly distinguishes them from foreign enterprises. The dynamics of capitalization of the central digital ecosystems of the USA, China and Russian Federation on Figure 1 are shown.

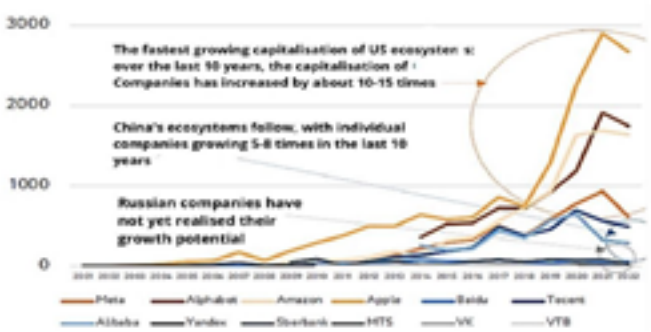

Figure 1 – Capitalization of leading digital ecosystems using the example of the USA, China and the Russian Federation, billion USD

According to Figure 1, capitalization in the Russian Federation is noticeably lower than in the United States. Due to the pandemic, there was a slight decrease in capitalization, but in 2022 the rate of decrease slowed down. It can be assumed that in 2023 the value of digital ecosystems will increase.

There is a high positive impact on economic and social development from digital ecosystems and platforms. In modern conditions, in general, the formation of digital markets, national digital ecosystems and platforms can be a driver of economic development, and will also promote economic and technological sovereignty, and increase the potential of enterprises in the field of competition with foreign digital ecosystems and platforms.

The development of digital ecosystems and platforms should be considered in the broader context of macroeconomic indicators such as economic growth rate, enterprise productivity, innovation indicator, international trade expansion index, labor market dynamics and inflation.

1 Boosting economic development can be attributed to direct impact, reducing transaction costs and increasing enterprise productivity.

2 Developed enterprise productivity is supported by reduced information asymmetry among market players, competitive dynamics among participants, and lower transaction costs. However, caution is warranted regarding potential market monopolization by a single platform and disruption of existing value chains.

3 Inflation and pricing of goods and services are influenced by reduced inflation through market competition, while market monopolization tends to drive prices up.

4 International trade development hinges on the reduction of transaction costs associated with cross-border purchases.

5 The labor market evolution allows for the emergence of freelance platforms, fostering greater labor supply-demand flexibility, breaking down geographical barriers in employment, and increasing workforce participation.

6 Enriching consumer experiences through expanded service offerings and time-saving measures can attract more participants to platform markets, promoting market diversity and efficiency. However, personalized pricing may lead to decreased user interest in the platforms.

From the perspective of economic development, there is a move away from ineffective intermediaries in the logistics system, the formation of competition, and ensuring information accessibility [6].

It is noteworthy that the positive properties of digital ecosystems and platforms include expanding the development opportunities for small and medium-sized enterprises, encouraging innovative entrepreneurship through the optimization of business operations and the associated development of the labor market [7]. Investment activity and the evolution of the domestic economy as a result of the significant potential of assets of digital ecosystems and platforms make it possible for enterprises to independently enter the capital market [8]. In addition, as a competitive advantage, one can point to the transformation of processes in the national venture market.

In general, utilizing platforms in business can greatly enhance client relationships by providing informative and supportive guidance, leading to increased sales and the ability to raise prices. It also enables the delivery of higher quality services, such as using a smartphone as a room key or checking in to a hotel through an app, as well as facilitating communication with hotel staff. This technology can also enhance the emotional experience for customers by allowing them to tag visited places, organize photos by location, and receive reminders and directions while traveling. Furthermore, it opens up new avenues for customer engagement and understanding through notifications, advertising, and reviews, as well as integration with social media platforms. Among the younger generation, social networks play a significant role in travel decisions, with up to 85% of decisions influenced by social media. This integration helps to identify personal preferences and attract potential clients [9].

The competitive landscape and vast opportunities in the app market are key factors influencing the potential for growth in the progress of innovative digital platforms [10].

In line with these trends, countries like Turkey and Kazakhstan have set their sights on advancing the «Tourism 4.0» concept through substantial investments in digital marketing for their tourism sectors [11].

Despite this forward-looking approach, Kazakhstan currently lags behind in global rankings for ICT readiness. Information-communication technologies are crucial for driving economic growth and enhancing competitiveness at a national level. The telecommunications industry is tasked with establishing a digital ecosystem to support digitalization efforts, modernizing telecommunications infrastructure, and fostering integration with other countries' infrastructures [12]. Kazakhstan's position in the 2021 TTCI rankings for the ICT readiness component is presented in Table 1.

Table 1 – Positions of Kazakhstan in the WEF TTCI 2021 ranking by ICT readiness factors*

Indicator	2021	
ICT readiness	Rating	Value
	62	5,0
Using the Internet for business-to-consumer transactions	34	5,6
Using the Internet for transport navigation	55	4,7
Using the Internet to provide hotel, restaurant and leisure services	78	4,8
Internet users, % of population	35	6,2
Fixed broadband Internet subscriptions / 100 people	61	5,2
3G mobile network coverage, % of population	97	5,9
Mobile broadband subscriptions / 100 people	64	2,7

Digital systems and services actively influence the hospitality industry. The events of 2022 determined changes in business processes, new integrations, and determined the launch of new projects by market participants [13].

The special investigates the state and progress trends in the tourism sphere. The central trends and outlines, key features of domestic tourism growing in 2022, reasons for demand reduction, and prospects for industry progress have been identified.

Table 2 – Digitalization of the Kazakhstan tourism industry

Project	Completed
JSC «NC «Kazakh Tourism»	A specially created structure of the Ministry of Culture and Sports, one of whose tasks is the marketing promotion of tourism. The budget of NC Kazakh Tourism JSC is 1.5 billion USD, including 893 million allocated for promotion and digitalization.
«Time on the road» message series	A series of programs about modern trends and results of work to develop the country's tourism potential. In 2021, 10 episodes were released, which were watched by more than 3.2 million viewers.
Cultural tourism	Promoting ecotourism and promoting care for nature with the involvement of people with disabilities. Through the promotion of 5 social videos created by the Kazakh audience, the reach on the Internet amounted to more than 10 million people.
National tourism portal «www.kazakhstan.kz»	Over the year, the portal was visited by more than 270,000 people, the number of visitors increased by 144% compared to 2020. The portal's position for basic queries in search engines has grown to the TOP 5 of Google and Yandex.
Tourstat.kz	Information system for collecting and processing statistics in the tourism sphere.
E-qonaq	An information system that allows for the creation of a unified register of accommodation locations has made it possible to collect and process data on tourist flow, tourist profile and migration control.
"SmartBridge" platform	Hotels and other accommodation facilities easily comply with the requirements of migration legislation. Tourists can move freely around the country, and the Ministry of Internal Affairs of the Republic of Kazakhstan and the National Security Service of the Republic of Kazakhstan can monitor the security of the country.

Automation of planning and organization of tours, blockchain, BigData and others.

Many enterprises restructure their business processes in accordance with the development paradigm of the digital economy, including online tour booking systems, e-commerce, etc.

National priorities for digitalization of the Kazakhstan tourism industry were presented within the framework of the »Concept for the development of

the tourism industry of the Republic of Kazakhstan for 2023-2029», approved by country Government Decree dated March 28, 2023 No. 262.

Digital technologies and services form the basis of a set of the most important trends of progress in the tourism industry. The impact of digitalization is manifested in various components of the tourism product. In particular, it affects the reduction of transaction costs and the increase in the competence of participants in the field of digital services and platforms. General digitalization, especially in the tourism sector, determines the profitability and development of this industry, the permanent modification of financial flows as a result of the transition of market stakeholders to the sphere of online services and products.

The core directions for the formation of digital services and technologies in tourism include the transition of public services to electronic platforms, digitalization of documentation and reporting processes, the use of digital tools for the formation of extensive networks of cooperation with business and experts in the design of tourism products and infrastructure, the organization of the tourism market, strengthening multilingual support for tourism services, integration of tourist electronic maps and mobile applications, implementation of an electronic system for assessing the quality of tourist services, popularization of visual impressions based on digital visualization technologies, virtual tours and augmented reality, integration of platforms for collecting and processing big data, use of artificial intelligence, formation of online tools for modeling tourist routes, involving self-employed people in the provision of specialized services, creating multimedia applications for displaying attractors, producing and distributing audio and video guide services combined with GPS and QR codes to expand accessibility and increase the quality of service for tourists.

Conclusion

By 2025, Kazakhstan aims to rank within the top 20 in the UN e-Government Development Index, the top 50 in the B2C E-Commerce Index, and the top 40 in the Information-Communication Technology Development Index.

Research demonstrates that digitalization is changing the economic dynamics among stakeholders in the tourism sector, covering manufacturers and suppliers of tourism services, tourists and authorized government organizations that monitor the state of the tourism sector. For this purpose, an algorithm for the development of a digital tourism ecosystem can be introduced, including Big Data technologies, smart tourism practices, contactless service, innovative solutions in the field of digital guides, virtual reality and VR/AR.

The use and distribution of online services will have positive dynamics. This is indicated by an analysis of the dynamics of the e-commerce market in the «post-form» period. In the future, we can expect that online travel platforms and

the popularity of booking tours and tickets online will grow rapidly, as choosing a tour will become much easier. The consumer will begin to compare the real price of services from different tour operators, which will certainly lead to saving money and time, and will also expand the possibilities for purchasing more economical tour packages.

The expansion of e-commerce in tourism improves the quality of services provided, shortens customer service time, and increases the range of services necessary for tourists. The latest technological solutions make it possible to create new ways to promote tourism services and products to the market. For example, based on the organization of personal mailing of advertising materials to the electronic accounts of potential tourists.

Tourism has historically been, and continues to be, an active player in the realm of innovative technologies. Recent advancements in telecommunications and digital marketing are presenting fresh opportunities for the tourism industry and fundamentally reshaping its operational paradigms. For instance, the widespread availability of information technologies, particularly online services, has democratized access for all stakeholders, fueling demand, enriching the offerings of travel agencies, and empowering individuals to independently plan and book their travel experiences.

Conversely, the clash between information and digital technologies and traditional modes of operation in the tourism sector has led to a fierce competition for customers, resulting in the marginalization of smaller enterprises that have not fully embraced these new trends.

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ТУРИЗМДЕ ЦИФРЛЫҚ ЭКОЖҮЙЕ ЭЛЕМЕНТТЕРІН ҚОЛДАНУДЫҢ ХАЛЫҚАРАЛЫҚ ТӘЖІРИБЕСІ

Зерттеудің мақсаты – халықаралық туризмді түрлендіру және дамыту үшін цифрлық экожүйелерді пайдалану тәжірибесін зерттеу.

Зерттеу нәтижелері ел үшін цифрландырудың жаңа бағдарламасын құру кезінде Қазақстан Республикасының стратегиясына өзгеріс енгізуге және басым бағыттарды анықтауға көмектеседі. Біздің нәтижелеріміз туризмдегі делдалдардың үнемі артып келе жатқан рөлін айқындайды. Сонымен қатар, жаңа технология ойыншылары инновациялық қызметтердің жаңа мүмкіндіктерін ұсынып, салада жоғары динамизмді қалыптастырады. Дегенмен, еуропалық туризмде тұрғындар мен қауымдастықтар ретіндегі жергілікті қатысушылар негізгі рөл атқарады және туристерге ұсынылатын тәжірибеге қосылуы керек. Ғалымдар мен практиктер нәтижелерді революциялық ойыншыларды және инновациялар мен тереңірек нақты құру

мүмкіндіктерін анықтау үшін пайдалана алады. Сонымен қатар, нәтижелер технологиялық жетістіктер немесе сыртқы оқиғалар салдарынан болып жатқан экожүйе өзгерістерін одан әрі талдау үшін негіз ретінде пайдаланылуы мүмкін.

Мақалада әлемдегі цифрландыру үрдістері талданады, Қазақстанның цифрлық экономикасын және цифрлық трансформацияға дайындығын бағалаудың әлемдік рейтингтерінің негізгі индекстері берілген.

Кілтті сөздер: цифрлық экономика, цифрландыру, туризм, цифрлық технологиялар, индустрия 4.0.

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МЕЖДУНАРОДНАЯ ПРАКТИКА ПРИМЕНЕНИЯ ЭЛЕМЕНТОВ ЦИФРОВЫХ ЭКОСИСТЕМ ТУРИЗМА

Цель исследования – изучить опыт применения цифровых экосистем для трансформации и развития международного туризма.

Полученные результаты исследования помогут скорректировать стратегию Республики Казахстан при создании новой программы цифровизации страны и определить приоритетные направления. Наши результаты подчеркивают постоянно растущую роль посредников в туризме. Кроме того, новые технологические игроки предлагают новые возможности для инновационных услуг, создавая высокий динамизм в отрасли. Тем не менее, местные субъекты, такие как жители и сообщества, играют центральную роль в европейском туризме и должны быть включены в опыт, предоставляемый туристам. Ученые и практики могут использовать результаты для выявления революционных игроков и возможностей для инноваций и создания ниш. Кроме того, результаты могут быть использованы в качестве основы для дальнейшего анализа текущих изменений

экосистемы, вызванных технологическими достижениями или внешними событиями

В статье проанализированы тенденции цифровизации в мире, приведены основные индексы мировых рейтингов для оценки цифровой экономики Казахстана и готовности к цифровой трансформации.

Ключевые слова: цифровая экономика, цифровизация, туризм, цифровые технологии, индустрия 4.0.

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