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MODERN STATE AND PROSPECTS FOR DEVELOPMENT OF KAZAKHSTAN AVIATION MARKET

Abstract. The article discusses the issues related to the state of the air transportation market in the Republic of Kazakhstan, as well as the prospects for the development of this industry. Also analysis of statistical data on the number of transported passengers and cargo for the period from 2011 to 2015 is carried out. Also, the work provides data on the number of airports, airlines and their flights in the context of cities. It is concluded that the development of domestic flights is conditioned by the possibility of subsidizing and more active formation of the population's demand from airports and airlines. Competitiveness of passenger air transportation, taking into account Kazakhstan's geographical realities, is conditioned by the minimum time on the way compared to the other ways of transportation. However, in order to attract demand, airlines should strive to reduce costs by increasing utilization of fleet, reducing maintenance costs, increasing direct ticket sales. For the dynamic development of domestic flights in Kazakhstan, parallel development of the tourism industry and corresponding infrastructure is also necessary.

In the field of cargo transportation, further development prospects are related to the development of the ground handling of transit cargo carriers, the provision of competitive services, beneficial connections to the countries of the Customs Union, the CIS, etc.

Key words: civil aviation, domestic routes, airport, cargo service.

Аңдатпа. Мақалада Қазақстан Республикасының әуе тасымалдау нарығының жағдайы мен саланың даму келешегі талқыланып, 2011-2015 жыл аралығындағы жолаушылар мен жүк тасымалындағы статистикалық деректерге талдау жасалынған. Ішкі рейстердің дамуын субсидиялау

мүмкіндігі мен қоғамдық сұраныстың тұрақты өсуімен байланыстырады. Жалпы, жолаушыларды әуе жолымен тасымалдау Қазақстан нарығында географиялық ерекшелігі және уақыт үнемдеу тұрғысында бәсекеге қабілетті көлік ретінде қарастырылады. Алайда, сұранысты күшейту үшін әуекомпанияларға шығындарды азайтып, билеттердің тікелей сатылымын көбейтуі керек. Ішкі рейстердің динамикалық, жан-жақты дамуына туризм саласының және қосалқы инфрақұрылымдардың сәйкесінше өркендеуіне мүмкіндік жасалынуы қажет. Жүк тасымалының келешегі үшін Кедендік одақ пен ТМД елдері арасындағы тиімді шарттар негізінде қарым қатынастарды нығайтып, транзиттік тасымалдауды әрі қарай дамыту қолға алынуы тиіс.

Кілт сөздер: азаматтық авиация, ішкі әуе тасымалы, әуежай, жүк тасымалдау қызметі.

Аннотация. В статье обсуждаются вопросы, касающиеся современного состояния рынка внутренних авиаперевозок в Республике Казахстан, а также перспективы развития этой отрасли. Проводится анализ статистических данных о количестве перевезенных пассажиров и грузов за период с 2011 по 2015 гг. Также в работе приводятся данные о количестве аэропортов, авиакомпаний и выполняемых ими рейсов в разрезе городов. Сделано заключение, что развитие внутренних маршрутов обусловлено возможностью субсидирования и более активным формированием спроса населения на авиаперевозки. Конкурентоспособность пассажирских авиаперевозок, учитывая казахстанские географические реалии, обусловлена минимальным временем в пути, однако для привлечения спроса авиакомпании должны стремиться к уменьшению стоимости за счет увеличения коэффициента использования самолетного парка, сокращения затрат на обслуживание, прямых продаж билетов. Для динамичного развития внутренних рейсов в Казахстане необходимо также параллельное развитие отрасли туризма и соответствующей инфраструктуры.

В области перевозок грузов дальнейшие перспективы развития связаны с развитием направления наземного обслуживания транзитных грузоперевозчиков, предоставление конкурентоспособных услуг, выгодных стыковок в страны Таможенного союза, СНГ и т.п.

Ключевые слова: гражданская авиация, внутреннее воздушное сообщение, аэропорт, грузовое обслуживание.

Introduction

Key challenges of the 21st century, such as the global energy security, the exhaustion of natural resources, the fourth industrial revolution, the growing social instability and the threat of a new world destabilization determine new requirements for the country's social and economic

development, including the infrastructure of the transport system. If in the years of formation of the Republic of Kazakhstan it was a question of developing and maintaining the transport system, in the present conditions the infrastructure of the transport system should become a catalyst for the long-term socioeconomic development of Kazakhstan, ensuring interregional communication within the country and integrating the country's economy into the world system, quality and safety. Successful integration of Kazakhstan's economy into global market in the context of globalization is impossible without the development of a transport system within the country. Therefore, the development of the transport industry as a whole should be aimed at increasing the level of development of the transport infrastructure. An important task of the transport and communication infrastructure is to ensure the availability and quality of transport services.

Discussion

The international airline industry provides service to virtually every corner of the globe, and has been an integral part of the creation of a global economy. The airline industry itself is a major economic force, both in terms of its own operations and its impacts on related industries such as aircraft manufacturing and tourism, to name but two. Few other industries generate the amount and intensity of attention given to airlines, not only among its participants but from government policy makers, the media, and almost anyone who has an anecdote about a particular air travel experience [1].

Aviation is a critical and unique industry. It provides the world's rapid global transportation network with over 1400 airlines flying to 3883 airports and transporting more 3.6 billion passengers annually. Every year 54% international tourists travel by air while increased of global business and tourism have contributed to the growth of global economic impact (estimated to be worth 2.7 trillion US dollars including direct, indirect, induced and the catalytic effects of tourism). The growth of world air travel has averaged approximately 5% per year over the past 30 years, with substantial yearly variations due to both to changing economic conditions and differences in economic growth in different regions of the world. Historically, the annual growth in air travel has been about twice the annual growth in GDP. Even with relatively conservative expectations of economic growth over the next 10-15 years, a continued 4-5% annual growth in global air travel will lead to a doubling of total air travel expenses during this period [2].

The aviation industry is also notoriously sensitive to the prevailing economic climate. In recent years, airlines and airports have responded to decreasing profit margins by increasing the number of flights and routes, airline mergers, code-sharing and offering 'no frills' flights. Although it has adapted to deal with external factors such as poor weather conditions, a weak global economy and concerns regarding international security, it also needs

focus on vital internal factors that can support the industry, namely improving the quality of the air travel experience [3].

In these conditions of external influence of industry-wide problems as well as the impact of internal factors, it is necessary to complete tasks for developing a competitive branch of civil aviation in Kazakhstan. And this industry sets a goal to accelerate the development of the infrastructure, the service system, the network of routes and the system of personnel reproduction. In addition, air transport occupies an important place in the transport and communication complex of the country in terms of its potential for developing international relations and maintaining the competitiveness of the transit potential of the country as a whole. In the National program for transport infrastructure development and integration in the Republic of Kazakhstan towards 2020 (hereinafter - the Program), serious targets are set for the inclusion of civil aviation to the overall prospective model of the transport and logistics hub.

Civil aviation is given special importance, in the forthcoming medium-term period within the framework of this Program, in order to expand intrarepublic transportation due to the existing territorial distribution and transport network of Kazakhstan. At the same time, the factors limiting the development of the air transportation market in the Republic of Kazakhstan have not lost their significance. First of all, the state of airports infrastructure do not allow the acceptance of modern aircraft. Second, the low level of competition in the fuel supply market and ground services affects the level of tariffs and fees, thereby reduces the loading of routes and hampers the development of competition on domestic routes.

Given the influence of fuel and airport charges, competition from Kazakhstan Temir Zholy, domestic air transportation is not yet able to develop without sufficient state support. A certain threat to the development of local air carriers is the issue of transition to the concept of «open skies» within the CES because there is a lack of prerequisites for competitiveness.

In Kazakhstan 15 out of 23 airports have access to serve international flights. The main load for both cargo turnover and passenger turnover is performed by Almaty International Airport as the main airport of departure and arrival.

For the period from 2011 to 2015 the industry has developed quite stably, especially in the sector of passenger transportation, mainly due to domestic traffic (Table 1). With regard to freight traffic dynamics, it is not stable enough, both in terms of the volume of goods transported and in terms of freight turnover.

The air transportation market maintains a high seasonal dependence. Passenger traffic almost doubles in the summer season and slightly decreases in the second half of the year, while cargo shipments increase steadily by the end of the year. Monitoring of this trend can be taken into account when

planning domestic transport, pricing, implementing efficient use of the transport fleet and infrastructure.

In the domestic air transport market, there are 6 airlines with access to regular commercial passenger flights: Air Astana, Scat, Bek Air, Qazaq Air, Zhetysu Air and Zhezkazgan Air. Only two airlines, Air Astana and Scat, operate international flights. 7 of the 23 domestic airlines operate regularly, 16 - irregularly (15 passenger charters, and one cargo charter), other 27 air carriers have certificates for aviation works (aerial chemical works, forest patrols, etc.) and one more company is a general purpose airline operator.

Table 1

General indicators of Civil Aviation of Kazakhstan

Indicators	2011	2012	2013	2014	2015
Cargo transported by Kazakhstan Airlines (thousand tons)	29	20	24	20	17
Freight turnover (thsd. ton/km)	92 567,2	59 462,2	63 130,1	49 273,3	42 699,9
Number of passengers travelling by Kazakhstan Airlines (thousand people)	4111,5	4558,7	4993	5447,7	5925
Passenger turnover (mln. passenger/kms)	7 838,5	8 622,6	9 687,8	10 586,3	11 153,3

Source: Agency of Kazakhstan of Statistics [4].

There has been a lot of work done to improve air transport infrastructure in the civil aviation industry. The reconstruction of runways and eight passenger terminals has been carried out in 13 out of 20 existing airports of national and regional significance. Additionally, new runways at Almaty and Atyrau airports and passenger terminal at Astana, Almaty and Aktau airports have been constructed. Today, 15 out of the 23 airports can service international flights, categorized according to the ICAO standards. The implementation of infrastructure projects in civil aviation will bring all airports to compliance with ICAO international standards and improve safety and quality of service. It will make it possible for airports to receive modern aircraft, expand routes by increasing the number of national and international airlines, as well as increasing passenger handling and air cargo transit [5].

At the same time, there are 7 regional airports in the country, which currently providing a service from 7 to 70000 passengers per year and they are unprofitable. These airports in Semey, Taraz, Zhezkazgan, Taldykorgan, Kokshetau, Petropavlovsk and Balkhash do not reach the conditional threshold level of 100000 passengers per year, which would allow to receive income that can cover operational costs of the airport at least. But these airports have a

socially significant character for the development of the region and the state from the republican and local budgets subsidizes air routes to the cities of Kokshetau, Petropavlovsk, Balkhash, Taldykorgan and Semey [6].

In 2016, Kazakhstan's airports served about 12 million passengers, 70% of all passengers was served in Astana (3.5 million) and Almaty (5 million) airports. These two airports are in the top 10 among the CIS countries in terms of the number of passengers serviced.

According to the state news agency Kazinform, and with reference to official statistics issued by the Ministry of Investments and Development, in 2015 national carriers serviced 3.9 million passengers on domestic flights, a remarkable figure given that the country's overall population is less than 18 million. As the total number of passengers carried by Kazakhstan airlines amounted to 5.9 million in 2015, the share of domestic transport services was as high as 66 per cent.

In order to ensure competition all restrictions were lifted at internal air transport market in 2012 (the market was fully liberalised). Thus, each Kazakhstani airline, having approval to perform regular domestic commercial flights, has the right to do it on any domestic route in accordance with the existing demand.

Most of the country's domestic flights operate from Almaty (15 routes), Astana (15 routes) and Aktau (6 routes). About 60% of domestic traffic was handled by national carrier Air Astana, and SCAT and Bek Air experiencing the second and third best result respectively (their figures on domestic flights in 2015 are almost identical) – with a combined share of slightly under 40%. Other airlines like Qazaq Air, which started operations in August 2015, Zhetysu and Zhezkazgan Air shared less than one per cent of the market (Figure 1) [7].

In general, for the development of the domestic market of air transportation, it is also necessary, in addition to modernizing the land structure and the fleet, to develop a system for training personnel. Consequently, this segment of the market can be created only with the direct participation of the state and the parallel formation of a system of state regulation and support of socially important areas. When financing and investing the development of airport infrastructure and the acquisition of aircraft, it is necessary to take into account the assessment of the existing possible route networks and connections in main hubs, occupancy of seats, planning of tariff formation, including the fuel component.

In the long term, domestic air transport should have the potential to expand the regular route network covering the countries of the Central Asian region and beyond, Russia, Belarus, CIS countries, China and far abroad. This can be achieved through the formation of an internal system of air transportation through docking major Kazakhstan airports, which already have the ability to receive long-haul international flights.

Providing internal and interregional links, transport accessibility and mobility it will influence the alignment of territorial disparities in Kazakhstan. In this regard, it is advisable to use the strategic approaches of lowcosters to increase the aircraft refueling, reduce the cost of maintenance, increase direct sales of tickets, etc.

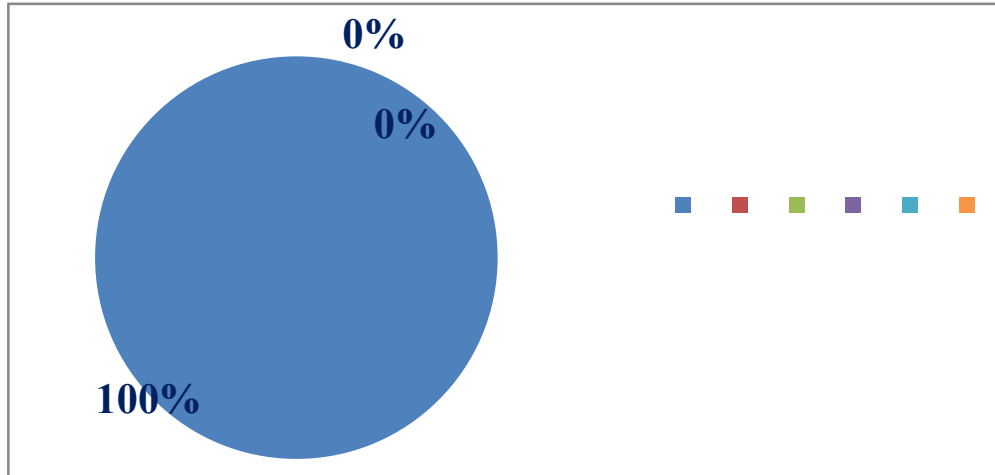


Fig. 1. Domestic market share

Source: Kazakhstan Civil Aviation Committee

In the freight transport sector, certain prospects are associated with the development of the direction of ground handling of transit cargo carriers, the provision of competitive services, advantageous connections to the countries of the Customs Union, the CIS, etc. Taking into account the geographical location of Kazakhstan airports, the distance segments of the existing route crossings of the world's main cargo-carrying and freight-consuming centers, this direction of using the infrastructure is promising. In this respect, the development of competition in the field of aviation fuel supplies is of great importance, since at present the volume of aviation fuel production in the Republic of Kazakhstan is insufficient to meet the existing needs, and with increasing demand there is a potential problem of non-fulfillment of the conditions of service. In addition, one of the main obstacles is the certification of ground infrastructure and air navigation services for compliance with international standards.

Competition in this market increased the quality of services provided, allowed airports to receive revenues from related activities. And at present, these revenues, together with revenues from air navigation services and services for servicing direct air transport activities, account for almost half of the industry's revenues. Airports have the opportunity to develop a trade business, to attract other companies on a competitive basis to provide various services to passengers and represent a virtually separate branch of the economy.

Conclusion

The application of this experience in Kazakhstan will make it possible, using the best international experience, to form the sector of air transportation services. So in the industry program one of the tasks is the development of the terrestrial service sector that will improve the management efficiency in the industry and create conditions for attracting international transit carriers to the Kazakhstan market.

Thus, the domestic air transportation market and the civil aviation industry in Kazakhstan have good prospects for development. To implement these prospects, it is necessary to use existing in international practice methods of regulation and management of industry development, including infrastructure improvement, development of the route network and improvement of service quality.

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REFLECTIONS ON RUSSIAN COMPATRIOT POLICY IN COMMONWEALTH OF INDEPENDENT STATES

Abstract. The last year marked the 25 years of the creation of the Commonwealth of Independent States. Despite the existence of criticism in certain media and analytical circles in respect to the Commonwealth of Independent States (CIS) activity, the organization has firmly established itself as an essential format for further cooperation of the participating countries. No doubt the main positive outcome in creating CIS has been peaceful divorce of