

ANNOTATION
of the dissertation for the degree of Doctor of Philosophy (PhD) in the
specialty 6D050600 – “Economics”

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COMPETITIVENESS OF THE AVIATION INDUSTRY AS A
FACTOR OF ECONOMIC DEVELOPMENT OF THE REPUBLIC OF
KAZAKHSTAN

Relevance of the research topic.

In the context of increasing global competition, transport infrastructure is considered not only as a sectoral industry, but also as a multiplier of economic growth, ensuring the expansion of markets, the reduction of transaction costs and increased investment attractiveness of the territory. Civil aviation generates significant indirect effects through the development of tourism, logistics, trade, financial and service activities. According to estimates of international organizations, the aviation industry, together with indirect and induced effects, makes a significant contribution to global GDP and provides millions of jobs, influencing production chains, the service sector and international trade [1, 2].

In international practice, issues of competitiveness of the aviation industry receive considerable attention both within the framework of sectoral studies and in the system of state economic policy. In particular, within the framework of strategic documents of a number of countries, aviation is considered as an element of national industrial and transport strategy. Thus, the states of the Middle East, Europe and Southeast Asia consistently implement models for the formation of regional aviation hubs, integrating transport policy with investment, industrial and digital strategies. The creation of aviation hubs, the development of multimodal logistics centers and integration into international transport corridors act as instruments for strengthening the geoeconomic positions of countries. At the same time, the competitiveness of the industry is assessed not only through indicators of financial stability of aviation enterprises, but also through its contribution to the formation of added value in related sectors – tourism, logistics, trade and finance.

In the context of these global trends, Kazakhstan also faces the need to increase the competitiveness of its aviation industry. At the same time, the geoeconomic position of the country in the center of Eurasia creates objective prerequisites for the development of a transit aviation hub and the integration of Kazakhstan into intercontinental transport flows. According to the Bureau of National Statistics of the Republic of Kazakhstan, in 2024 air transport carried 14.7 million passengers, which is 10.6% more compared to 2023, and passenger turnover reached 28.3 billion passenger-kilometers, increasing by 9.2% [3]. In addition, the volume of passenger air transportation in 2024 exceeded the pre-pandemic level of 2019 by more than 50%, which indicates not only the recovery of the industry, but also the formation of a stable positive trend. Revenues of air transport enterprises in 2024 increased by more than 20% compared to the previous year, which reflects the

expansion of the air transportation market and the strengthening of the financial position of the industry [3]. At the same time, despite the positive dynamics of key indicators, structural limitations of development remain: a relatively low share of transit passenger flow, insufficient integration into global route networks, as well as a comparatively moderate contribution of the aviation sector to the formation of gross domestic product. These circumstances determine the need for a comprehensive scientific analysis of the competitiveness of the aviation industry as a factor of economic development of Kazakhstan.

In recent years, Kazakhstan has implemented an institutionally structured state policy aimed at forming a competitive transport and logistics architecture and strengthening the role of the aviation industry in the structure of the national transit potential. Among the most significant strategic and program documents are the State Program of Infrastructure Development “Nurly Zhol”, the provisions of the Strategy “Kazakhstan-2050” regarding the modernization of transport infrastructure, the Comprehensive Plan for the Development of Civil Aviation, as well as the Concept for the Development of the Transport and Logistics Potential of the Republic of Kazakhstan until 2030. A further strengthening of the strategic focus on the development of aviation as a driver of economic growth was reflected in the Address of the President of the Republic of Kazakhstan Kassym-Jomart Tokayev to the people of the country dated September 8, 2025, where the increase of competitiveness of the national aviation industry was outlined and the strategic task was formulated – the formation of Kazakhstan as a leading aviation hub in the Eurasian space [4].

The above indicates that in modern conditions there is an objective need for a comprehensive study and in-depth elaboration of the theoretical and methodological aspects of the competitiveness of the aviation industry in the context of global economic transformations. A comprehensive scientific understanding of the factors forming the sustainability and efficiency of the aviation sector is required, as well as the formation of theoretical and methodological foundations and the development of effective mechanisms ensuring coordinated interaction between infrastructure development, the institutional environment and the requirements of the international aviation market. Thus, the relevance of this dissertation research is determined by the need for scientific substantiation of the competitiveness of the aviation industry as a system-forming factor of economic growth and strengthening of the international competitiveness of the Republic of Kazakhstan.

Degree of scientific development of the problem.

The issues of competitiveness of the aviation industry as a factor of economic development are widely reflected in the works of both classical and modern researchers. Within the framework of classical economic theory, the foundations of competition analysis were laid in the works of Adam Smith, and the development of the theory of competitive advantages was substantiated in the works of Michael Porter, Frank H. Knight, Campbell R. McConnell, and Paul Samuelson [4, 8, 9, 16, 17]. A significant contribution to the development of the categorical apparatus and methodological foundations of competitiveness management was made by N.G. Butskaya, R.A. Fatkhutdinov, I.A. Golikov, N.A. Voronina, V.N. Ivanov and others,

whose studies reveal the mechanisms for the formation of competitive advantages and the instruments of strategic enterprise management [10, 18–22].

Sectoral aspects of the development of civil aviation and the functioning of the air transportation market are considered in the works of D.A. Seliverstov, A.V. Gubenko, M.M. Brutyan, N.I. Efremova, O.A. Nemchinov, as well as foreign researchers Yijia Zhang, Douglas Baker, Rico Merkert, Md. Kamruzzaman, Yi Hu, Sun X., Stefan Wandelt, Anming Zhang and others, who study the influence of air transport on economic growth, regional connectivity and the dynamics of market concentration [36–40, 42, 43, 103–105]. These studies empirically confirm the relationship between the development of aviation infrastructure and macroeconomic indicators.

Issues of strategic positioning of airlines, tariff differentiation and transformation of business models in conditions of increasing global competition are reflected in the works of Andrea Fiore, Mehmet Yaşar, Kadir Kıracı, Majid Tavana, Slavko Dožić and Miloš Kalić, as well as in analytical materials of the International Air Transport Association (IATA) devoted to the consequences of the COVID-19 pandemic and structural changes in the global aviation services market [71, 74, 76, 83, 88].

In the Kazakhstani context, problems of development of the aviation industry and increasing its competitiveness are considered in the works of D. Madiyarova, A. Bazikenova, G.Sh. Kaliakparova, E. Abilpatta, Sh.G. Kairova, G.N. Dzhaksybekova, A.G. Ableeva, M.U. Spanov and others, where institutional limitations, financial sustainability of aviation enterprises and strategic directions for strengthening their market positions are analyzed [5, 32, 69, 70, 72, 97].

Despite the significant volume of theoretical and empirical developments, there remains insufficient integration of macroeconomic analysis, industry specifics and tools of multicriteria modeling into a single conceptual model for assessing the competitiveness of the aviation industry of Kazakhstan as a factor of economic development. This determines the need to form a comprehensive theoretical and methodological approach combining classical theories of competition, modern industry studies and applied methods of quantitative assessment.

Purpose and objectives of the research.

The purpose of the dissertation research is the theoretical and methodological substantiation of the competitiveness of the aviation industry of the Republic of Kazakhstan as a factor of economic development, the development of methodological tools for its comprehensive assessment, as well as the formation of a multi-criteria model and organizational and economic mechanisms for increasing its competitiveness.

To achieve this goal, the following tasks were formulated and solved in the dissertation:

- to study the economic content and theoretical foundations of competitiveness of aviation enterprises;
- to analyze the world experience of ensuring the competitiveness of airlines in the context of economic development and identify possibilities for its adaptation to the conditions of Kazakhstan;

- to systematize and substantiate methodological approaches to the economic assessment of competitiveness of the aviation industry;
- to analyze the current state and dynamics of development of the aviation industry of Kazakhstan;
- to conduct a comprehensive assessment of the production and economic indicators of the activities of Kazakhstani airlines and determine the factors forming their competitiveness;
- to analyze the competitive positions of Kazakhstani airlines in the air transportation market and assess the level of their competitiveness;
- to substantiate recommendations for improving the system of criteria for assessing the competitiveness of airlines;
- to develop a multi-criteria economic model for assessing the competitiveness of airlines;
- to substantiate organizational and economic mechanisms for increasing the competitiveness of the aviation industry of Kazakhstan.

The object of the research is the infrastructure of aviation transport of Kazakhstan as a subsystem of the national transport system.

The subject of the research is organizational and economic relations and mechanisms for the formation, assessment and increase of the competitiveness of the aviation industry of the Republic of Kazakhstan.

The theoretical and methodological basis of the dissertation research is formed by classical and modern theories of competition and competitiveness, concepts of sustainable development of enterprises and sectoral markets, provisions of strategic management and institutional economics, as well as the application of a complex of qualitative and quantitative analysis methods, which made it possible to conduct a comprehensive assessment of the factors determining the level of competitiveness of the aviation industry of Kazakhstan as a factor of economic growth.

Scientific novelty of the research:

- based on the systematization of foreign and domestic scientific works, the author clarified the economic content of the category “competitiveness of the aviation industry”;
- a typology of models for ensuring the competitiveness of the aviation industry (hub, liberalization, state-investment, integration) was developed;
- the author substantiated a methodological approach to the economic assessment of the competitiveness of the aviation industry based on the integration of micro- and macroeconomic indicators;
- a comprehensive assessment of the production and economic indicators of Kazakhstani airlines was carried out;
- a system of criteria for assessing the competitiveness of airlines was developed;
- a multi-criteria economic model for assessing the competitiveness of the aviation industry was proposed;

– organizational and economic mechanisms for increasing the competitiveness of the aviation industry of the Republic of Kazakhstan were substantiated.

Theoretical and practical significance of the research.

The theoretical significance of the dissertation lies in the development of the provisions of the economic theory of competitiveness in relation to the aviation industry and in the improvement of methodological tools for constructing integral index models of industry analysis.

The practical significance of the work is determined by the possibility of applying the developed methodology by state bodies, industry regulators and airlines in strategic planning, assessing market positions and forming programs for increasing the competitiveness of the aviation sector of the Republic of Kazakhstan.

Approbation of the work.

The main results of the dissertation research were presented and discussed at scientific and practical conferences of various levels.

Publication of research results.

The results of the dissertation research were published in 10 scientific works of the author. One article entitled «Competitiveness of the Aviation Sector and Ensuring National Security of the Government» was published in a journal indexed in the international scientific database Scopus. In addition, five articles were published in scientific journals recommended by the Committee for Quality Assurance in the Sphere of Science and Higher Education of the Republic of Kazakhstan.