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Tourist destination dynamics in Russia

Tourism development and public-private partnership In four non-metropolitan destinations

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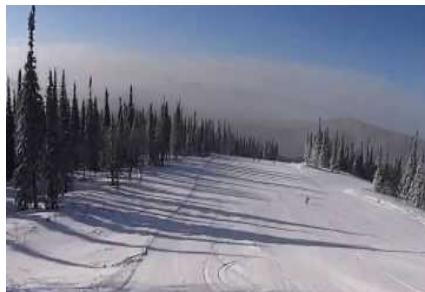
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TOURIST DESTINATION DYNAMICS IN RUSSIA

*TOURISM DEVELOPMENT AND PUBLIC-PRIVATE PARTNERSHIP
IN FOUR NON-METROPOLITAN DESTINATIONS*



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Contents

1	Tourism development in non-metropolitan Russia.....	1
2	Concepts and methods.....	2
2.1	Reconceptualising tourist destinations	2
2.2	Empirical methods.....	3
3	Literature review	5
4	Tomsk: Business tourism and fragmented public governance	7
4.1	Tomsk as a tourist destination	7
4.2	Key actors: resources, strategies and collaboration.....	8
4.3	Patterns of Cooperation.....	14
4.4	Conclusions	16
5	Ivanovo: Building heritage tourism	18
5.1	Ivanovo as a tourist destination.....	18
5.2	Key actors: resources, strategies and collaboration.....	20
5.3	Patterns of Cooperation.....	24
5.4	Conclusions	26
6	Kemerovo: Tourism in a carbon-economy region	28
6.1	Kemerovo as a tourist destination.....	28
6.2	Key actors: resources, strategies and collaboration.....	30
6.3	Patterns of Cooperation.....	34
6.4	Conclusions	36
7	Altai Krai: More healthy tourism?.....	39
7.1	Altai Krai as a tourist destination.....	39
7.2	Key actors: resources, strategies and collaboration.....	41
7.3	Patterns of Cooperation.....	44
7.4	Conclusions	48
8	Conclusion	51
9	Bibliography	55
9.1	Literature	55
9.2	Documentary sources.....	59
9.3	Interviews	62
10	Endnotes	65

1 TOURISM DEVELOPMENT IN NON-METROPOLITAN RUSSIA

Tourism has been a fast growing area of socio-economic activity in Russia in recent decades.

International tourist flows have grown, both from Russia to Europe and beyond, and from abroad to especially the Russian metropolis Moscow and St. Petersburg. In parallel with this, domestic tourism in Russia has also increased, and many non-metropolitan destinations are now attempting to increase their share of the market for tourism in order to increase the robustness of the regional economy.

Like in the vast majority of countries, tourism development involves a complex web of interactions between public and private stakeholders, but the precise nature of these interactions varies greatly between destinations depending on the institutional context, the tourism-relevant resources available, and the ways key actors make strategic use of local opportunities (Dredge, 2006; Halkier, 2013; Henriksen, 2012).

The aim of this report is to illuminate the role of the public sector in tourism development in non-metropolitan regions in Russia, focusing on two aspects in particular

- the tourism development strategies and activities of regional and local government
- partnership and other forms of interaction between public and private stakeholders

The report proceeds in four steps. First a brief introduction sets the scene by taking stock of the small but growing international literature on tourism in non-metropolitan parts of Russia. Then the conceptual framework for the study as well as the empirical methods are described. Section 3 is the main part of the report, presenting the findings of case studies undertaken in four regions of Russia that attempt to promote tourism within their area, namely Tomsk, Ivanovo, Kemerovo and Altai Krai. Finally, the conclusion will compare and contrast the findings from the four tourist destinations in order to illuminate the role of the public sector in tourism development in non-metropolitan Russia.

The report has been produced in connection with a project sponsored by the EU through the TEMPUS programme, *TOULL – Tourism and Life-long Learning* (see <http://www.tempus-tourism.aau.dk>). The research designed was elaborated on the basis of a proposal by Henrik Halkier and Dieter Müller, the empirical case studies were undertaken by the Russian consortium partners who then drafted the regional reports. The results from the reports were then discussed at project seminars by Siberian and European partners before the final joint writing up of the text.

2 CONCEPTS AND METHODS

2.1 Reconceptualising tourist destinations

Drawing on the work of Halkier & Therkelsen (Halkier & Therkelsen, 2013), the report takes its point of departure from the assumption that tourism destinations are open systems that are defined by the three key groups of stakeholders – tourists, providers of services and attractions, and public regulators – and the institutions – e.g. market relations, informational flows, and policy incentives – that influence their interactions.

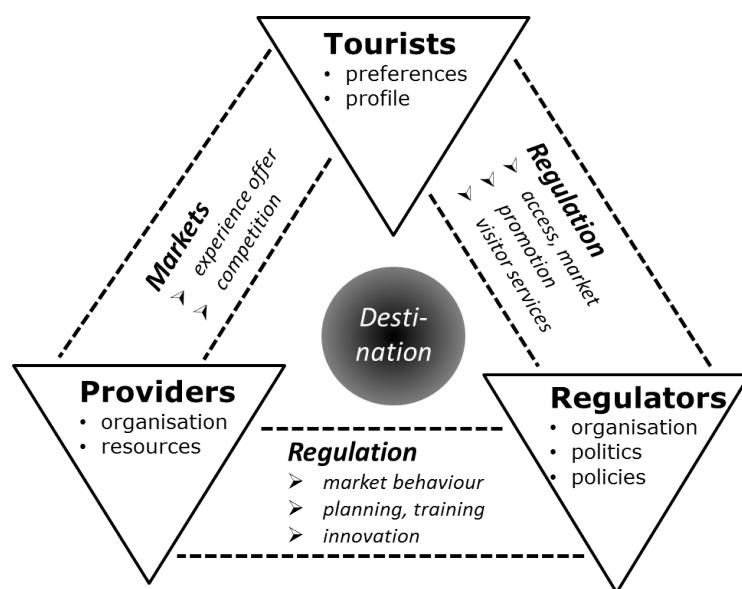


Figure 1. Tourist destinations: Stakeholders and institutions

Source: Halkier & Therkelsen, 2013.

The conceptual framework, summarised in Figure 1 above, is inspired by traditions within institutionalism (Halkier & Therkelsen, 2013; North, 1990; Thelen, 2009). The key assumption is that institutions act as sets of rules on the basis of which individual or collective actors operate, and that in most societies at any point in time several institutions coexist. Translated into the context of tourist destination development, the starting point of the analysis will be to identify the key institutions that govern the relationship between the three groups of actors that are central to tourism as a social activity, namely the visitors, the tourist industry, and government. Although all three groups generally consist of a multiplicity of actors with different resources and preferences (Ioannides & Debbage, 1997; Weaver & Lawton, 2002) – e.g. leisure and business travellers, local attractions and multinational airlines, tourist offices and planning authorities – it is still possible to identify a number of key institutions on the basis of which their interactions take place.

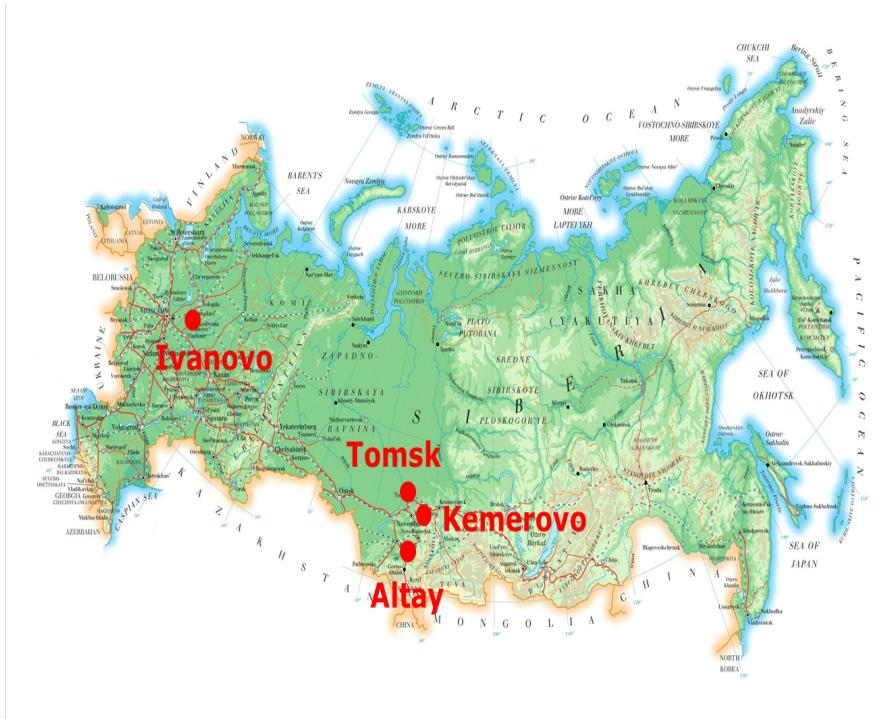
Both in leisure and business tourism the relationship between visitors and service providers is conducted primarily on the basis of market relations, because visitors have a range of options in terms of where to go, how to travel, where to stay, and/or what to do at the destination, and hence individual providers and collective destinations perceive themselves as competing with other providers/destinations offering similar experiences and services. However, the interactions between the various providers in the individual destination will also include a combination of market and network relations: they depend on the same visitors and hence, compete in similar markets. At the same time this shared reliance on the same clients may also further existing forms of cooperation within the destination (Hall & Williams, 2008; Hjalager, 2010). In contrast to this, the relationships between regulators and both visitors and providers have hierarchical elements, because governments have the ability to define specific rules about the behaviour of other actors, e.g. visa requirements or spatial planning, and non-hierarchical elements, such as place branding, provision of advice, or establishing public-private partnerships in order to further innovation (Dredge, 2006; Hall, 2008).

The relationships between the three key groups of actors may be institutionalised in a variety of ways; From an institutionalist perspective this means that these specific rules form the basis for the perceptions and agency of individual actors – and hence, make it more or less difficult to bring about change within the destination, whether incremental or otherwise. It is particularly important to note that some actors – visitors, multinational firms or central government – are situated outside the destination in which touristic activities take place, and that in organisationally fragmented destinations characterised by a large number of small actors, policy agency by public bodies is likely to be necessary in order to coordinate activities and bring about a concerted momentum (Dredge, 2006; Halkier, 2010).

As will be evident from the empirical analysis, these concerns are as relevant in Russian destinations as they are in the rest of the world.

2.2 Empirical methods

The report is based on fieldwork undertaken by four teams of Russian researchers working on the basis of a shared conceptual framework and guidance in terms of research questions and methods. The teams are based in non-metropolitan Russian regions (see Figure 2) that represent four different forms of tourism – MICE, nature tourism, cultural tourism, active tourism – and thus by combining them we should be able to capture the diversity of actors involved with regard to consuming, producing and regulating tourist experiences outside Moscow and St. Petersburg, the metropolitan tourist magnets in the Russian Federation.



The research teams collected data on current tourist activities and key development trends, including quantitative indicators of recent development trends, qualitative profiles of the main tourist activities in each destination (reasons to go). On the basis of these interviews with key actors from four groups of stakeholders were undertaken, namely representatives of private entrepreneurs, public sector representatives, cultural institutions, and knowledge institutions. In total 70 interviews were carried out, as summarised by Table 1. The semi-structured interviews covered the following topics: the principal resources at the disposal of each actor, their development strategies and activities, and their patterns of interaction with other actors. On the basis of these interviews, the opportunities and challenges for cooperation about tourism development in each of the four regional destinations has been identified, and similarities and differences regarding the role of public-private partnership in tourism development in non-metropolitan Russian destinations can be concluded.

TABLE 1: Distribution of interviewees by regions and sector

	Tomsk	Kemerovo	Altay Krai	Ivanovo	Total interviews
Private sector	2	18	5	3	28
Public sector	2	6	2	3	13
Cultural institutions	5	4	4	2	15
Knowledge institutions	3	9	1	1	14
Total interviews	12	37	12	9	70

3 LITERATURE REVIEW

The international academic literature on non-metropolitan tourism in Russia is limited, and although the role of public-private partnership is touched upon, it is rarely central to the argument of the writings which instead focus on Russia's generic destination image (Stepchenkova & Morrison, 2006; 2008); the resources that can potentially be mobilised for economic development (including touristic) purposes (Kuleshov, 2012), and public-private partnership as a general policy tool in the post-Soviet era (Mouraviev & Kakabadse, 2014). The issue of governance is central in the 1998 article by Peter Burns (Burns, 1998), but it can only document the early stages of institutional flux and the uncertain relationship between public and private actors that characterised the first years after the introduction of market-economy reforms. The most comprehensive discussion of non-metropolitan tourism can be found in Braden & Prudnikova's (Braden & Prudnikova, 2008) analysis of the challenges associated with ecotourism, focusing especially on the relationship between local stakeholders and communities on the one hand, and national/international stakeholders on the other, both with regard to conflicting conceptions of tourism drawing on natural resources, and investments in new tourist developments. In their paper the relational geographies of tourist destination development and macro-level analysis is, however, the main focus, and thus the internal stakeholder relationships within the regional destinations are only touched upon briefly.

Substantial input to the conceptualising a tourism destination and the tourism recreation development of Russian regions was made by such authors as A. U. Aleksandrov, A. I. Zorin, and A. S. Kuskov, focusing in particular on geography oriented approach; E. A. Dzhandzhugazova, O. V. Ostroumov, and L. G. Kiriyanova, developing the concepts of marketing and branding of territories; M. A. Morozov, M. N. Voit, and N. A. Goncharova, applying holistic approach and providing input to analysing the regional tourism systems; N. A. Kolodii, enriching the experience economy practice with cases of culture clusters in cities of Russia; and A. U. Aleksandrova (2002), one of the first researchers of the 1990's defined the general concepts of tourism industry, international tourism, etc. She analysed and appointed the tourism industry demands, its geography and also the trends of tourism industry development in Russia in 1990's-2002.

In Russian practice public-private partnership is implemented as infrastructural projects (construction and exploitation) based on federal, regional or municipal property and regulated by concession law and regional legislation. This reflects a narrow meaning of the term (PPP Development Center - <http://pppcenter.ru>). Partnership between the public and private sectors is a fairly new trend in the Russian economy, and among the key publications on this topic we can mention the monograph by V. E. Sazonov (2010) who analyzed the experience and existing national PPP models in emerging markets and developing countries, including Russia, putting emphasis on the historical and cultural context of the interaction between business and government. M. V. Tkachenko et al. (2014) analysed the experience of the state regulation of PPP in 85 Russian regions and summarized the best practices in the "Regional PPP Standard". P. L Seleznev (2009) was one of the first Russian researchers to discuss the foreign experience of PPP and the prospects of its application in Russia. A. V. Bazhenov and

V.A. Kabashkin (2008) reviewed the public-private partnership as a tool for attracting investments to Russian regions.

Taken together the existing international and Russian literature would, therefore, lead us to expect that tourism development in non-metropolitan Russian regions seems to involve the following key actor groups, namely

- *tourists* that mainly travel from within adjoining regions or from the main metropolitan areas in Russia,
- *providers of services and experiences* that are polarised along two lines: large and small private firms, and public bodies involved in the management of cultural and natural assets for recreational and educational purposes
- *governance structures* that have gradually created a national framework for regional tourism development, albeit one that has been implemented unevenly across Russia

Added together this leads us to expect that the four non-metropolitan destinations are likely to focus on strengthening their position on domestic markets, but that the ways in which this unfolds will depend on the touristic resources available, and the ways in which public and private actors manage to marshal these in a targeted and systematic manner in order to develop tourism in their region.

4 TOMSK: BUSINESS TOURISM AND FRAGMENTED PUBLIC GOVERNANCE

4.1 Tomsk as a tourist destination

The Tomsk Region is situated in the south-western part of Siberia, with most of the territory being occupied by forests such as taiga and steppes, swamps, rivers and lakes, including the massive Ob river system that divides the territory into two almost equal parts. The urban, economic and political centre of the region is the city of Tomsk, which in itself account for more than half of regional population. The economy of the region revolves around primary industries exploiting the vast rural hinterland of the city, but the city of Tomsk itself also has long-standing importance in Siberia as a centre of education, research, and innovation, based on a considerable cluster of public universities, knowledge institutions and the establishing of a Special Economic Zone focusing on technology development.

TABLE 2: Destination Tomsk Region: Key data					
	2012	Tourist arrivals in commercial accommodation ('000)			
Region / km ²	314,400	Domestic	2011	2012	2013
Region / population	1057,000	International	.4	6.0	4.7
Region / person per km ²	3.4	Total	161.0	162.0	157.3
Capital city population	539,200				
Hotels/restaurants share of regional GDP	0.95				
Travel agents total	131				
Commercial accommodation facilities	82				

Sources: <http://tmsk.gks.ru> (Rosstat, Tomskstat)

The main attractions that drive tourism in the region are, on the one hand, natural phenomena like the recreational potential of the Ob and Tom rivers, the Vasyugan swamps, and the extensive taiga forests dominated by Cedar (Siberian pine) that lend themselves to fishing and hunting. On the other hand especially the city of Tomsk has considerable cultural resources of touristic significance, including major museums and exhibition spaces, and a significant presence of historical wooden buildings decorated with elaborate carvings that reflect the importance of the city as centre of commerce and intellectual endeavour dating back to its foundation in 1604 by decree of the Russian tsar Boris Godunov. Finally, in recent years the hosting of recurring events focusing on culture and innovation, has gradually become a major attraction for visitors, building on the long-standing business tourism generated by the city's status as a major economic, knowledge and political hub in Siberia. For faraway travellers, Tomsk is easily reached by air and rail, but accessibility for foreign visitors is limited by the lack of scheduled international flights and being located 50 km away from the Tran-Siberian railway.

As illustrated by Table 2, in recent years visitation has grown slowly, after a period of faster growth in the preceding decade. Occupancy rates of commercial beds have increased to 58%, and visitors are overwhelmingly domestic travellers. No breakdowns of tourism activity by purpose (nature/active,

culture, business/event) are available for domestic travellers, and although visa data are available for international visitors, showing a roughly equal balance between business and leisure as travel reason, because more than four-fifth of the visas are issued on the basis of foreign visitors travelling for 'private purposes'. However, although tourism has been growing in recent years, it still only accounts for a very small share of regional GDP, as illustrated by Table 2, and is easily dwarfed by primary sector industries that account for nearly 30 per cent of the region's economic activity, and, indeed, the average role of tourism (hotels and restaurants) in the Russian Federation standing at 1.1 per cent of GDP. This may be an important part of the explanation for, as we shall see in the following, the difficulties of getting tourism onto the political agenda within the region.

4.2 Key actors: resources, strategies and collaboration

This section identifies the key actors in tourism development in Tomsk, focusing in particular on the resources, strategies and patterns of collaboration in shaping the future of the regional visitor economy.

PUBLIC AUTHORITIES

In Russia, like elsewhere, multi-tiered public authorities not only create the framework within which private actors operate but also contribute to the development of facilities that facilitates or hinders the growth of the visitor economy. In the case of Tomsk, the city government has decided not to give priority to tourism as an economic sector and hence has allocated neither funds nor staff. This makes Tomsk Region, its political leadership and administration, the central public actor in relation to the destination. Tomsk Region has the authority to regulate and plan tourist-related activities, and the executive unit responsible for this is the Department of Culture and Tourism (DCT).

The regional tourism strategy is described in a long-term program entitled *Development of Culture and Tourism in Tomsk region in 2015-2020 years*. The program was elaborated and coordinated by DCT, with other departments of regional government as contributors, but without involvement of other tourism actors, public or private, in program development. The overall aim of the regional tourism strategy is

'development of domestic and inbound tourism on the territory of Tomsk region'

In order to achieve this, two key objectives are indicated in the strategy:

1. The competitiveness enhancement of regional tourism market: activities for promotion the regional tourism potential to Russian and international markets
2. Creation the conditions for tourism development and support to the prioritised types of tourism

Since 2012 there has been a paradigm shift in the field of governmental regulation and stimulation of the development of tourism in the Tomsk region: a regional tourism development program has been

adopted, a number of local municipalities have developed their own tourism strategies, and interest in the development of tourism clusters has grown. However, in practice DCT does not seem to have sufficient resources to pursue its wide-ranging ambitions, because within the department only one small unit – the Division of development of domestic and incoming tourism with just two graduate employees – focuses on tourism. The regional budget assigned in 2013 only 23 million rouble for the implementation of the targeted programmes for the tourism development, and 56.5 million rouble in 2014. But in fact, according to the “Plan of 2014 activities” just 10 million rouble were assigned, for activities one million (consisting of transfers to municipal authorities for their tourism related activities), four million for events for child tourism, and five million for web-site elaboration, promotion photo and video, mass media publications, seminars and competitions for local tourism market actors, participation in tourist exhibitions. All funding was allocated for authorities bodies or public organisations that are effectively part of Tomsk regional administration; for example, all promotional activities (including media communication) are provided by Recreation centre and Centre of child and youth activities. The overall budget of the Programme has been approved by the Governor until 2017, but every year budget revisions may take place. The budget of the state program *“Development of Culture and Tourism in Tomsk region in 2015-2020 years”* is 12 billion roubles and only 18.8 million roubles are planned for the program *“Development of domestic and inbound tourism in Tomsk region in 2015-2020”*.

Despite the formal consolidation of the region’s regulatory and planning functions of tourist activity at the Department of Culture and Tourism, the actual implementation of policy in the field of tourism and hospitality within the regional administration is very fragmented. Supervision of hotels and eating places belongs to the Department of the Consumer Market, and all activities associated with scientific and educational tourism are implemented by the unit headed by the Deputy Governor for Scientific and Educational Complex and Innovation Policy, something that makes it difficult for the regional authorities to develop a coordinated approach to the development of Tomsk region as a tourist destination.

Moreover, in the above target programme of tourism development there is no priority forms of tourism, a main tourist product is not indicated. The Department of Culture and Tourism, perhaps unsurprisingly, aims its main efforts at the development of cultural tourism, whereas the Deputy Governor for Scientific and Educational Complex attempts to create an event-based brand that can attract thousands of business tourists to the region from across the country and abroad. Lack of coordination results in limited resources being dispersed, different activities not complementing each other or creating one product/brand. The Tourist Information Centre of Tomsk (TIC, <http://tic-tomsk.ru/>) opened in 2015, and this promising and relatively new project may partially solve the mentioned problems on local level of tourism development, although one year of its activity is a short period of time to make a substantial conclusion about its effectiveness.

PRIVATE TOURISM BUSINESSES

The two main groups of private tourism actors are travel agencies and hotels. As noted earlier, most travel agencies are focusing on outbound travel, taking Siberians to destinations elsewhere in the

Russian Federation or abroad, but a minority of travel agencies also focuses on incoming visitors. An example of this is the *Tourist excursion company "Polaris"*, working in the tourist market since 1999. It provides a full range of services for incoming tourists: visit planning, hotels and tickets booking, visa support, insurance, guided tours across the city and the region, transfers, translation and etc.

Moreover, the company is one of very few providing exclusive guided tours across the city for foreign tourists, and "Polaris" owns a large vehicle fleet for this purpose. In 2004 Tomsk Region Administration granted the travel agency "Polaris" a certificate of accreditation that enabled the firm to provide its services to official delegations and guests of Tomsk region, and at the competition of tour operators of Tomsk region, the company "Polaris" received the award for "Best Tour Operator" and "Best Manager of Incoming Tourism". The company representative who was interviewed stated that the flow of tourists to Tomsk has significantly increased in recent years, but that this trend is not yet self-sustaining in comparison to outbound tourism, although the long-term prospects in the hospitality and services area are seen as very promising.

CULTURAL ATTRACTIONS

In addition to a number of major government-funded museums – e.g. Tomsk Regional Museum, Tomsk Museum of Wooden architecture, Tomsk Art Museum, and Tomsk Memorial Museum of the History of Political Repression – culture-based visitor attractions are also provided by non-government institutions such as religious communities and private museums. While the public cultural attractions would generally seem to see their mission as providing services to the local population, privately-sponsored cultural attractions also see visitors as an important part of their target group.

In the Tomsk region religious institutions are important tourist resources, because in the region there are original places of worship of Orthodoxy, Judaism, and Islam, which are unique architectural and cultural monuments. Tomsk was also the residence of St. Theodore of Tomsk, whose relics are kept in Bogoroditse-Aleksievsky Monastery of Tomsk (who by popular legend he is considered to Emperor Alexander I, faked his own death and became a wanderer). Only the Orthodox community has its own infrastructure of hospitality facilities: at Bogoroditse-Aleksievsky Monastery there is a hotel for 11 visitors. Guests of Tomsk eparchy in many cases stay with the hostel of Tomsk Seminary. Guests arriving as part of pilgrim groups - by advance agreement - get free food in the refectory of Tomsk Seminary.

Representatives of religious communities are not directly interested in the development of tourism, but they are always open to all guests and recognise that it allows them to transmit their values to greater number of people, and they support efforts to increase interest in visiting Tomsk and its religious sites. They actively participate in the distribution of information through the religious festivals, websites, publication books, films and postcards, but in assessing the potential for attracting additional guests on the basis of religious attractions and more generally in Tomsk and the Tomsk region, all respondents representing religious organisations mainly point to disadvantages. In particular, for the city of Tomsk the infrastructure is seen as, many of the wooden houses are in a bad condition that undermines the credibility of the idea of wooden architecture as the key heritage of the city, as well as a lack of a ready tourism product in the form of e.g. tour packages, plus of course the high prices of hotel services in Tomsk. Nevertheless, one interviewee indicated that Tomsk gives a

generally favorable impression with its architectural image of a historic Siberian city and special glimpses of centuries past.

The first *Museum of Slavic Mythology* originated in a private art collection, and the museum was founded and remains private. It contains original paintings, graphics and works of decorative art based on Slavic history, mythology, epic tales, Russian fairy tales and customs. Museum activities include tours, educational programmes, special topic events and meetings. The museum was founded by Tomsk businessman Gennady Pavlov. A historian by training, at first he organised the fund "Russian Way" with a free public library devoted to Slavic culture, traditions and domestic history. Later on the place of the fund the first museum of Slavic mythology appeared. Initially having educational goals, the museum became a commercially successful project. The strategy of the museum is to constantly evolve, expand and update its collections, and to organise interactive exhibitions, thus making the museum a relevant resource from the perspective of cultural tourism.

The "Semiluzhky fortress" is located 30 km from the city of Tomsk, and it is a reconstruction of the military fortification – a Cossack outpost that existed in the XVII century in Siberia. The Ostrog (prison) is a key element, erected in 2010, where festivals, fairs, performances by folk groups are often organised. An attractive feature of the project is the interactive nature of the fortress, where visitors can work with ancient tools, eat traditional food, etc. The attraction is a completely private initiative by V. Ilyin, who tries to recreate Russian traditions, financed from his own means, but with the support of the local village administration and donations of stakeholders. The attraction has no commercial purpose, and in fact, the fort was built and continues to be built by volunteers, and Ilin plans further construction of the fort - living buildings on historical prototypes, craft workshops, outbuildings, etc. The facility is not intended for mass tourism, with a maximum capacity of about 30 people (the fortress area does not exceed 100 square meters), but the fortress is very good for an organised group and individual recreation – for kids and adults. This may be for a day trip or a kind of "immersion" into the atmosphere of Cossack outpost of the XVII century. A convenient location allows the use of the fortress as a weekend route, include a visit to the fortress in a longer tour programme as a radial route, as well as to attract potential tourists from neighboring regions.

ORGANISATION OF EVENTS WITH TOURISM POTENTIAL

From the standpoint of tourism development, the *Association of military sports clubs of Tomsk Region* has recently become a major actor as initiator and organiser of visitor-relevant events. The association is 22 years old, over the past 10 years it has accumulated a substantial financial base, partly through organising "Ethnoforum", an annual series of cultural events geared towards the expansion of the traditional culture, around thousand people takes part in the forums event. In 2014 the forum was included in the programme of the Government of the Russian Federation for the *Year of Culture in Russia* and thus gained an international status. Moreover, "Tomsk outpost" - a summer programme for teenagers from different regions that combine athletics training and Russian national culture – is included in the schedule of Rostourism's events as well. All activities are the initiative and enthusiasm of representatives of the association. The approximate investments in these activities consists of 30% grants won by the team's members (mainly grants of the Ministry of Economic Development to support non-government organisations), 30% from sponsorship by companies, and 30% from

municipal and regional budget (through the youth policy authorities, to be funded with a tender). The main objective of the association is “to develop event tourism, “Ethnoforum” is a vivid example, and we are trying to develop this trend, especially this year it has received the international status and will be 30% financed from the state budget.” “We hope to open our own tourist information centre (there is no any tourist information centre in Tomsk), we have designed a few tourist routes around Tomsk (2-3 hour walking tours “Elan” and “Voskresenskaya Mountain”), and within the grant about 200 people have been already guided through these routes.” The Association is in other words an interesting example of an NGO gradually assuming wider functions in the development of tourism within the Tomsk region, including potentially filling voids created by the non-action of public authorities.

In 2015 “Ethnoforum” and “Festival of Axe” has created a partner event program, and as a result more than 100,000 people visited the event. The “Festival of Axe” is an annual cultural event in Tomsk region (contest of wood sculptures and fair of crafts) that has been first been organized in 2008 in the Rural Park “Okolitsa” and becoming increasingly popular in the regional tourism market.

Targeting rather different audiences but operation in parallel ways, Tomsk also hosts two series of innovative events aimed at bringing together the three parts of the triple helix: business, knowledge institutions, and government. *International Innovation Forum Innovus* and the *Youth Forum U-novus* are the largest events in the field of business and scientific and educational tourism in the region.

Innovus – Russia's first innovation forum – was held in 1998 for the first time. Over the past years the forum grew from an all-Siberian event into one of the main sites in Russia to discuss innovative development of the country. *Innovus* invariably attracts experts of federal and international level. Among the more than 2,000 participants, including state corporations, Russian and foreign investors, venture capital firms and innovative companies. The forum *U-novus* is a new communication, discussion and creative platform for young scientists, inventors, entrepreneurs in innovations. The event combines different levels and scales of interaction: panel discussions, foresight sessions, workshops, and laboratories. The events of the first *U-novus* were attended by over 12,000 people, and the business programme alone involved 1,300 participants from 93 cities of Russia. The two innovation events have become a main brand of Tomsk Region, they are held every two years and alternate, so that every year Tomsk is hosting a major triple-helix innovation event. The forums are a classic example of event tourism, and they are designed in such a way so that they do not just attract tourists to the destination, but also target groups a long-term interest to strategic development of innovative economy of the region. The concept of both forums has been developed by Tomsk Region Administration which is the main organiser, lobbyist and financer, but in 2013 and 2014 the operator of both forums was Tomsk Polytechnic University. The administration keeps the right of strategic leadership the forum, but all organisational matters, including formation of the programme and financial management were transferred to the operator. According to the operator, the organisation of mega- events is the most effective tool to stimulate business tourism in Tomsk. It allows not only to increase awareness of the city, but also to attract the main target audience, which repeatedly returns to Tomsk after a while. Also this business-oriented form of event-based tourism is in other words driven not by a mainstream tourism development organisation, but by specialist units of government – in this case the region's innovation office and a public knowledge institution – that further their own ends through tourism, rather than having tourism as a goal in its own right.

KNOWLEDGE INSTITUTIONS

In recent years publically funded knowledge institutions have started to play a greater role in relation to tourism development in the Tomsk region.

The *Siberian Resource Centre of Tourism Industry* at Tomsk Polytechnic University prepares specialists in service industry and tourism within programs of training and retraining, as well as conducting research in the development of regional tourism. Funding for the centre is supported by the university and national as well as international grant programmes, while there is no funding from the regional authorities. Tourist businesses are not yet ready to invest in training, but they willingly participate in the programmes if additional funding is not required. The staff of the Resource Centre believes that the most promising direction for Tomsk as a research and educational centre is the development of business and educational tourism, which could become a backbone element for the whole destination. They note that despite the obvious relevance of educational tourism, this is absent in all official documents on the development of the tourist industry in the region. The Centre considers its strategic development in the near future in the mainstreaming of educational and business tourism and the development of proposals in this area, including assistance in adaptation of international students, and development of the volunteer support of educational tourism.

In parallel with this, and only a short distance away in geographical terms, the *Department of International Relations, Tomsk State University* has implemented a special series of seminars in international tourism - educational and scientific programmes as part of its preparation of specialists in international relations the past few years. The department believes that business, scientific and educational tourism could become a strategic decision for the entire city. It developed the project "Tomsk -Centre of International Educational Tourism", which tried to present to the city administration (Mayor advisor on tourism), but failed. The reason of this failure was that the city administration does not play – or wishes to play – a significant role in tourism development, it is mainly a regional administration competence. For the short period of time there was a Mayor advisor on tourism, but she came from the historical heritage protection institute and was only interested in cultural and historical resources, something that was in line with the emphasis placed in cultural tourism in the region. At the moment a new Mayor advisor on tourism who became the director of newly-opened Tomsk tourist information center in 2015 promotes the image of Tomsk as the "Emerald city" (like in the Wizard of Oz fairy tale) for city-break tourists from neighbouring regions.

Tomsk state and Tomsk Polytechnic universities have been competing for last 100 years to attract the best students and resources. This competition is one of the main drivers of education and science development in Tomsk. Unfortunately, tourism education is not a subject of the universities collaboration, as there are no joint projects between these two important knowledge institutions.

All in all we see a picture of stakeholders within the Tomsk region which seem to suggest

- a limited involvement of public authorities in terms of proactive governance of tourism development
- a fragmented private sector that operates on the basis of existing tourist flows but rarely attempts to develop qualitative new initiatives

- several niche initiatives in event-based tourism, driven by civil society and/or public bodies in pursuit of their own agendas (outdoor leisure, innovation)

With stakeholders positioned like this, collaborative efforts are obviously needed, but also inherently challenging to bring about.

4.3 Patterns of Cooperation

As noted above, the regional tourism programme did not involve much by the way of interaction or top-down support for initiating with local authorities and supporting public-private partnership. The long-term target programme “Development of domestic and incoming tourism in Tomsk region in 2013-2017 years” was developed without any involvement of the key private stakeholders of the destination, and instead included only departments of the regional administration and local municipalities as partners.

Almost all interviewed industry representatives noted a low activity of the administrations of the region and the city in the area of tourism. The main expectations of authorities from private actors were destination promotion (“we are ready to provide high quality hospitality service, just make Tomsk famous») and infrastructure development (transport accessibility, tourist friendly environment). Commenting on the aspect of the interaction with public authorities all respondents indicated its unsystematic, random nature of inviting them to take part in regional tourism development, usually it is in the form of order from the authorities to organise tours for visitors to the city on the territory of religious or private facilities or in the case of VIP-persons coming from abroad. However, some noted that they regularly receive requests from the administration to provide reports, information, video and photo materials. Others point to unsuccessful attempts to reach the authorities with proposals and projects. In other words, despite the presence of a specialised regional tourism authority, due to various factors (fragmentation of functions, limited resources, lack of consolidated marketing -oriented approach) the target programme of the administration of Tomsk Region cannot consolidate and promote the interests of all actors within the tourism destination.

Conversely, all respondents from the attractions noted the presence of partners among other organisations in the region which help effectively implement projects and in cooperation with which they see their future, and all pointed to the sponsorship of their projects from businesses (Ethnoforum, Ostrog in Semiužhki, religious organizations). It was also noted that, unlike the regional authority's support which implied an expectation of getting assistance with the hosting of guests of the regional administration, help from private actors do not carry expectations of bonuses and preferential treatment. The interaction with private actors also occurs in the joint formation of attraction content: many exhibits of Slavic mythology at the fort of Semiluzhki and for Ethnoforum's events were collected and implemented as a result of interaction with the creative and religious communities. In fact all respondents indicated these organisations as key partners. This suggests that in the region there are the most active organisations, which initiate activities to promote tourism in the region, but in figures, they are a small number of all the actors in the market. All partnerships are initiated independently for a specific project, and thus the region has got no pressing reason for establishing a wider partnership in the field of tourism and hospitality.

Interestingly, there are, however, examples of successful cooperation with the regional administration, namely the role of Tomsk Polytechnic University as an operator of the forums *Innovus* and *U-novus*. These events were initiated by the administration, but a wide range of stakeholders were involved in their design and implementation, each of which was able to solve their problems - from the capacity problems of hotels to attraction of investors. The representatives of the region administration give the forums as an example of successful implementation of public-private partnerships, separately noting, that such a project make it possible to combined different competences to jointly solve a shared problem. It is worth noting that these forums were initiated and overseen not by the region's Department of Culture and Tourism, but instead by its scientific and educational units and economic development units within the region. Several reasons of such cooperation success can be identified:

- Firstly, it was originally decided to involve into project realisation all interested stakeholders: six universities, techno-park, innovative companies, exhibition centre, restaurants, hotels, airport, promotional agencies, tour-agencies, different departments of regional administration, city administration. Each of them got its own "part of the event" and was free to realise it within framework of common strategy.
- Secondly, the regional administration did not coordinate the event, the operator was independent but authoritative and competent arm's-length organisation, in this case Tomsk polytechnic university, which made communications between different actors easier.
- Thirdly, authorities did not try to impose their own tasks or realise their own views and ideas, instead each of the actors had an opportunity to realise its aims within the project, it was originally designed in the interest of different stakeholders, making use of their respective competences and resources.
- Finally, in spite of the business aspect of the event, it was decided to make it useful cultural tourism development and attractive for citizens: series of concerts, fire-show, guided tours were organised, for example the "Night of science" where museums and university laboratories were open for citizens.

In short, in situations with well-defined goals like planning and executing major events, bringing different partners around the table in order to help solve complex tasks can be achieved, also in the Tomsk region.

Figure 3 illustrates the current situation of Tomsk city administration and Tomsk's TIC with regard to patterns of tourism stakeholders partnership. They promote the idea of Tourism Educational & Entrepreneurial Cluster of Tomsk.

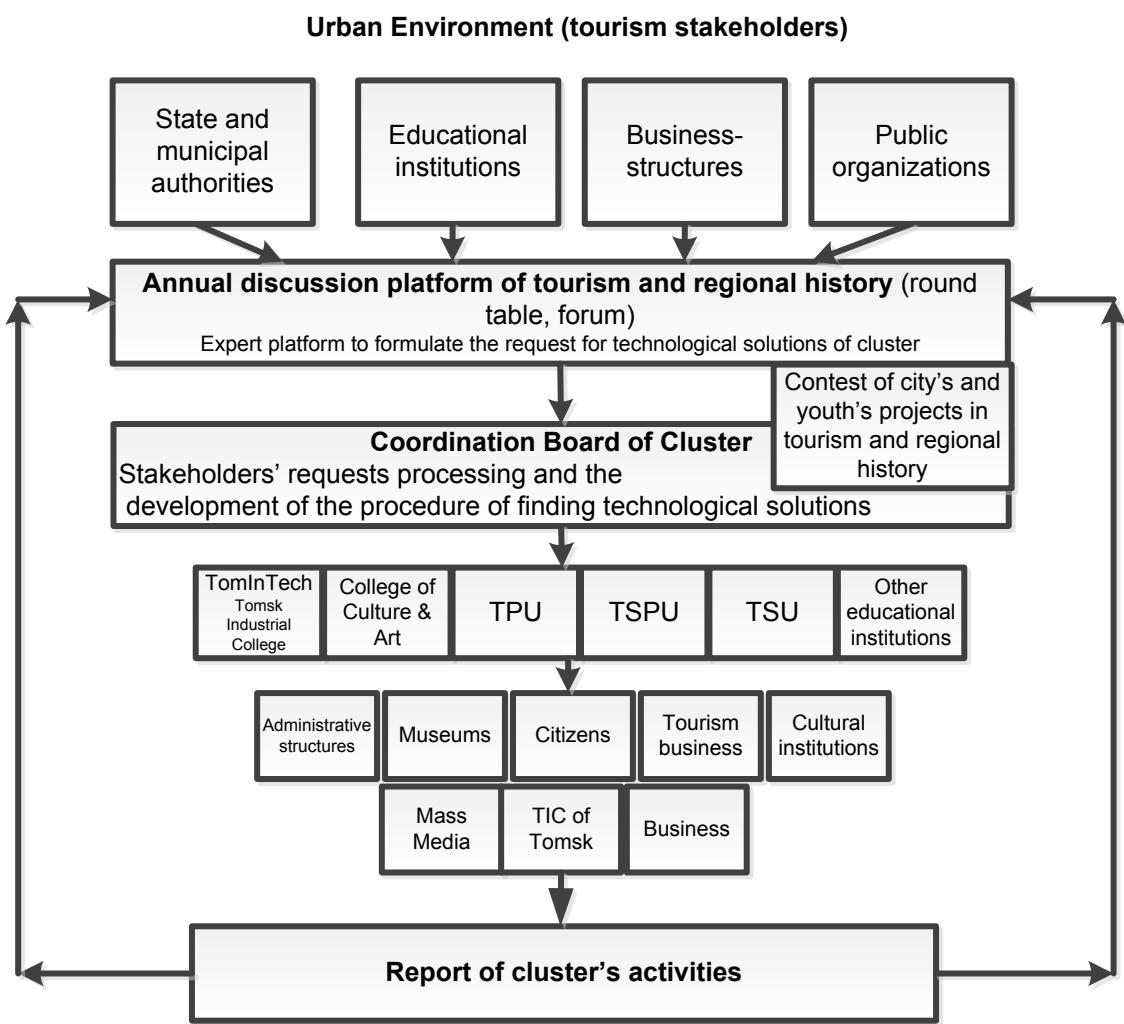


Figure 3. The structure of Tourism Educational & Entrepreneurial Cluster of Tomsk and the mechanism of its activity. Translated in English by authors. The original source in Russian available at <http://tic-tomsk.ru/node/1033>

4.4 Conclusions

In terms of reasons-to-go the cultural attractions in Tomsk are not popular enough to become a major destination product, and problems of transport and accessibility make cultural tourism even more difficult to develop. But the cultural aspect can be a very useful added value in the context of e.g. to business tourism, and thus the “unique selling proposition” of the Tomsk region also in relation to tourism could be argued to be its main strategy of economic development, namely further development of the scientific-education-innovations complex and thus build on the significant number of incoming tourists that visit Tomsk for business purposes.

All in all the analysis of tourism development strategies and interactions between public and private stakeholders in the Tomsk region has produced three important findings. Firstly, the prevalent strategy for private sector development is a “bottom-up” strategy where each actor implements projects based on its own beliefs and interests. These projects are developed, and reports thereon are submitted to the authorities in order to receive support and financial sponsorship. The most promising projects are included in federal targeted programmes and supported by the local and regional administration through competitions, grants. Secondly, there is limited horizontal integration of the efforts of the local actors who are trying to integrate actions in the development of Tomsk as a tourist destination. Activities for incoming tourism are often not coordinated but rather the individual initiatives of private representatives of tourism industry or universities. Thirdly, the Administration of Tomsk Region and local administrations regarding vertical integration and coordination of efforts in the development of incoming and domestic tourism is seen as limited and ineffective by private stakeholders. There is in other words no comprehensive, systematic approach to the problem, mechanism of the implementation of strategic documents, based on the interaction of actors of tourism in Tomsk region. Despite this there are, however, also notable examples of successful partnerships between public and private actors around particular development projects – attractions and events in particular – and thus the prospects of tourism development within the region would seem to rely predominantly on it being a spin-off from other socio-economic activities – e.g. cultural activities or innovation – rather than a primary goal of public policy.

5 IVANOVO: BUILDING HERITAGE TOURISM

5.1 Ivanovo as a tourist destination

The Ivanovo region is situated north-east of Moscow, traditionally dominated by agriculture and textile industries as its main economic activities. In recent years, however, tourism has come to play a larger part in regional development strategies, driven by the presence of cultural heritage and closeness to metropolitan Moscow and major Russian tourist routes.

TABLE 3: Destination Ivanovo: Key data					
	2012	Tourist arrivals ('000)			
		2010	2011	2012	
<i>Region / km²</i>	218,000				
<i>Region / population</i>	1062,000				
<i>Region / person per km²</i>	4.8	<i>Domestic</i>			
<i>Capital city population</i>	481,000	<i>Post-Soviet countries</i>			
<i>Tourism share of regional GDP</i>	0.33	<i>Other international</i>			
<i>Travel agents total</i>	N.a.	<i>Total</i>	235	327	294
<i>Commercial accommodation facilities</i>	47				
<i>Sources:</i> Rosstat					

The history of development of incoming and domestic tourism in the Ivanovo region in the last 50 years evolved in a series of stages. From the end of the 1960s to the end of the 1980s tourism was predominantly organised by trade unions in the context of brands such as «Textile land» and «Ivanovo - the birthplace of the First Soviet Workers Council», but also included the historical settlements Ivanovo, Palekh and Plyos in the inter-regional route «The Golden ring of Russia». After the systemic changes in the later 1980s and to the end of the 1990s, the spontaneous formation of the Ivanovo tourism as a sphere of free enterprise developed against a background of practically absent federal and regional tourism development strategies. The early years of the new century were characterised by the uncoordinated efforts of many municipalities in the sphere of tourism development, each pursuing their own concepts and programs of development. From 2005 onwards a regional program of tourism development in the Ivanovo region was elaborated on the basis of program-targeted methods of planning and management, and this was further strengthened by inclusion of the region in the Federal target program «Development of domestic and inbound tourism in the Russian Federation (2011-2018)», and the evolution of tourism in the framework of this program, the development of methods of public-private partnership, the cluster approach to tourism development in relation to the city of Plyos and its surroundings as a «pilot» project. Finally, since 2014 the concept of public-private partnership has expanded to other municipalities – the Volga cities Yurievets and Kineshma, centres of icon painting Palekh and the districts of Kholuy and Gavrilov Posad.

Tourism in Ivanovo region has in other words primarily been associated with cultural attractions, stemming both from the glorious industrial past where Ivanovo was the Manchester-style textile capital of Russia, and from a rich heritage of religious and other buildings from the czarist past. These

constitute resources that can be made relevant in the context of modern tourism development through coordinated efforts. In addition to cultural tourism, the Volga waterway lends itself to leisure tourism, health resort and sports tourism are developing, as well as cultural events, clothes shopping, and business tourism. The importance of the above mentioned types of tourism in the Ivanovo region arises, first, from its rich natural, historical and cultural potential, secondly, from its geographical location and, in particular, from its proximity to Moscow, thirdly, a significant role here is played by the traditions of the region that have emerged on the conscious desire to rely on those features of the area that stand it out against the surrounding areas. Finally, the well-directed efforts of the regional authorities on the development of tourist infrastructure are important here.

In terms of making touristic value of the existing cultural heritage, the inter-regional route visitor route, the «Golden ring of Russia», was introduced in the tourism turnover in the late 1960s, combining historical settlements located on the territory of the Vladimir, Ivanovo, Kostroma, Moscow and Yaroslavl regions. The main features, in accordance with which the historical settlements of the above areas were united into a common route, are their undoubted all-Russian value, involvement into Russian history and the formation of Russian statehood, high historical and cultural potential, a developed tourist infrastructure, good transport accessibility and relative compactness of location. In forty years of its existence the «Golden ring» has become one of the leading brands of Russian tourism, well-known both in Russia and abroad, standing in one row with Moscow, St. Petersburg, Karelia, Russian North, etc.

The Ivanovo region is not so rich in monuments of history and culture among the neighboring areas, in particular lagging behind with regard to architecture of the pre-revolutionary period, but in the Soviet period it has played a significant role in building of a new State system. In this regard, the region has a rich architectural heritage of the constructivist period, including the richest heritage of factory architecture. With regard to natural resources and level of development of tourist infrastructure, they are quite comparable with the neighboring regions. Besides, Ivanovo region has a special and advantageous geographical position in the area of the «Golden ring». First, it is a natural link between the area of the «Golden ring of Russia», Volga, one of the main tourist axes of Russia, and Nizhny Novgorod region, Eastern neighbor of Ivanovo region with a similar historical destiny and cultural originality. Secondly, the centre of the Ivanovo region, Ivanovo, is in a 2-4 hour car's distance from the cities of Nizhny Novgorod and Moscow, and almost one-hour car's distance from the biggest centres of the «Golden ring» of Russia: Rostov, Yaroslavl, Kostroma, Vladimir, Suzdal, Plyos, Palekh. This circumstance became the basis for positioning of Ivanovo as the «centre of the Golden ring», although in relation to the shape of the real «Ring» Ivanovo is situated on its periphery. Third, in connection with the commissioning of the bridge across the Volga near Kineshma through the Ivanovo region in the near future there will go a powerful road traffic, which will follow the shortest way between the Central areas of Russia and its Northern and North-Eastern areas. While Ivanovo may not yet be the region that benefits most from tourist flows along the «Golden ring», being an integrated part of it certainly one of the major strengths of the region in terms of tourism development potential.

5.2 Key actors: resources, strategies and collaboration

This section identifies the key actors in tourism development in Ivanovo region, focusing in particular on the resources, strategies and patterns of collaboration in shaping the future of the regional visitor economy.

PUBLIC AUTHORITIES

Like in the other case study regions, the regional level is very important in the governance of tourism development in Ivanovo region. The Department of Sport and Tourism is a division of regional with the corresponding budgetary financing. In the structure of the Department there is the Department of tourism, the few officials of which deal with issues of state regulation of tourism at the regional level. In particular, the Department deals with the administration of all regional target programs related to development of tourism, as well as the implementation of parts of the Federal target programs, including projects relating to the Ivanovo region. In recent years the Department of sports and tourism in cooperation with other departments of the regional government and municipal administrations deals with the development of public-private partnership, search and attraction of private investors for the implementation of projects aimed at the development of tourism and hospitality.

The Department of sport and tourism is the main developer of the long-term target programs on the tourism evolution in the Ivanovo region and promotion of the most important projects in the Federal target programs. Thus the Ivanovo region is among the few regions of Russia that entered the Federal target program «Development of domestic and inbound tourism in the Russian Federation (2011-2018)». This federal program aims to establish systems of the tourist-recreational services on the basis of the territories possessing significant historical, cultural and natural potential in Russia. It includes the projects that in conditions of sharp competition between the regions should be considered as a «pilot», i.e. on the basis of the experience gained on their implementation the wide development of tourist destinations in Russia are expected. Thanks to the efforts of the government of the Ivanovo region the project of development of tourist-recreation cluster, «Plyos» was included in this program, and recently the creation of three more tourist-recreation clusters on the territory of the Ivanovo region were additionally included in this program. In general the development of domestic and inbound tourism is recognised as the basic direction of the tourism development in Russia, what is stated in the «Strategy of the tourism development in Russia» adopted in May 2014.

The Department also developed and implemented the regional program «Development of tourism in the Ivanovo region in 2009-2016», followed in 2013 by the state program of the Ivanovo region «Development of physical culture, sport and tourism in the Ivanovo region». The Department of sport and tourism plays a role of the administrator of these programs. These programs combine the possibilities of the regional budget, the limited budgets of some municipalities of the region and the private investors with the purpose of development of the tourist infrastructure in these municipalities. At the same time private investors receive support from regional and municipal institutions in the form of certain tax preferences and opportunities to use public administrative resources in the

development of private-sector projects. The most successful projects of such programs get additional support by being included in the Federal program. The administration of such programs is handled by the Department of sports and tourism of the Ivanovo region. It is also promotes the Ivanovo region at the Russian and international tourist market, in particular, introduces the regional tourism at the exhibitions of different levels in cooperation with other bodies of the regional government.

The Department has a dedicated Tourism office engaged in direct work on coordination of activity of investors, travel companies and other actors in the sphere of tourism and hospitality in the region. An important function of the Department is to identify investors, include them in the mechanism of public-private partnership, monitoring of their activities, as well as the promotion of the tourist image of the region through participation in international and all-Russia tourism and recreation exhibitions. Public-private partnerships as a form of interaction of the Ivanovo region government, represented by the Department of sports and tourism, on the one hand, and private investors, on the other hand, is a regional target program of mixed financing, which sets out specific objectives, activities, terms of their implementation, financing, responsible agencies, the means of monitoring the projects execution.

The basis of public-private partnership in the tourism development in the Ivanovo region is the technologies of the working out and realisation of target programs of federal and regional levels. In the second case the regional government initiates the development of target program, in which the program goals, targets, purpose indicators and expected results, the year volume of financing, as well as specific tasks on creation of tourism infrastructure and promotion of the Ivanovo tourism are recorded. The program provides financing from three sources: federal budget, regional budget and extra-budgetary funds in an approximate ratio of 3 : 1 : 9. Financing from budgetary sources is used for the development of the transport and municipal infrastructure, the overall improvement, the development of state cultural institutions connected with tourism, financing of activities on promotion of the Ivanovo tourism. Budget utilisation is carried out through the departments of the government of the Ivanovo region and through subsidies from the regional budget to municipalities participating in the program. However, the largest amount of money is spent by private investors who participate in the regional and realise the projects on creation of proper tourist infrastructure in accordance with the measures of this program. The administrator of the program is one of the departments of the regional government, for example, the Department of economic development and trade of the Ivanovo region.

In parallel with this the Ivanovo region's Department of Education, in collaboration with the Department of Sport and Tourism, has developed and begun to implement a large-scale project of domestic tourism for children and school age «Journey to the province», the participants of which are institutions of general and additional education, administrations of municipalities of the region, museums and other cultural institutions, travel agencies. The list of the main objects of cultural heritage and recommended routes are developed, the catalogue of the project is published, the monitoring mechanism of participation of educational institutions in the project is got started. Due to the efforts, primarily, of workers of the Inter-regional resource centre for training and retraining of personnel for tourism and hospitality of ISPU the Concept of the children's and youth tourism evolution on the territory of the Ivanovo region is developed. It is aimed at maximum rapprochement of the school tourism contents with educational programs, and grants were used to support the training of 29 organisers of youth tourism out of teachers of the region.

An interesting example of tourism development initiated by a local government in the Ivanovo region is the Gavrilov-Posad municipal district, one of the few districts that have a predominantly agricultural orientation. However, its administration is systematically working on transformation of the region into a tourist destination. The district obtains a sufficient number of sites of natural, historical and cultural heritage, municipal museum, objects of tourist infrastructure, which can be brought to the sufficient for modern tourism and recreation level. In 2007 the district's administration had ordered the Department of socio-cultural service and tourism of the Ivanovo state textile academy (now – part of ISPU) to develop the Concept of revival of the district through tourism evolution. The long-term program of tourism and recreation development in the district was created on the basis of this concept.

PRIVATE TOURISM BUSINESSES

The Ivanovo region has prominent examples of tourism as a diversification strategy for existing businesses, originally operating in other industries. The «RIAT» group of companies in the regional capital is one of the region's largest joint stock companies with a wide range of manufactured goods and services, the group is a key investor in the Ivanovo region and it has recently moved into tourism to complement its traditional base in agro-food.

The strategy of «RIAT» in the sphere of tourism and recreation is vividly systemic and allows to solve a wide range of tasks, related to providing services to tourists and recreants. The direction of sports tourism (especially tennis, equestrian sport, sport for children and youth) is represented very clearly. Recently «RIAT» became the owner of the stud in Gavrilov Posad, whose history dates back to the reign of Ivan IV the Terrible. This acquisition means the beginning of a large-scale project on the development of inter-regional tourism (Ivanovo and Vladimir regions, and possibly beyond that) most likely in the framework of the public-private partnership.

Also the «Fortecia Rus» group of companies for the last eight years played the role of «anchor» investor in the development of tourism and recreation in the city of Plyos and its surroundings., focusing in particular on the riverside. A five-star hotel, «Sobornaya Sloboda», is a set of authentic old houses in the riverside-part of Plyos, restored and decorated as in olden time, each on a separate site, with a small private garden. The hotel has a developed tourist infrastructure – restaurants, tea-room, coffee shop and bar, saunas, SPA-services, an out-door theatre, interactive museums, infrastructure facilities for corporate rest, souvenir shops stylised as the old Plyos. For less well-off visitors there is a three stars hotel «Fortecia Rus». Plyos yacht club offers a wide range of services for storage, parking, repair and maintenance of yachts, boats and hydrocycles and renting of equipment for water activities (jet skiing, kiting, windsurfing, snow surfing, etc.). In addition to this serious efforts have been made to fill the modern Plyos with cultural events of high level: Levitan music festivals, the international competition «Shalyapin voices over Plyos», all-Russia festival «Jazz over the Volga river» and others.

The owner of these structures, A.V. Shevtsov, tries to reach the ideas of the revaluation of the objects of cultural heritage, responsible tourism, complex development of Plyos as a tourist centre of the European level, but while remaining a «symbol of Russian province in general, the symbol of the deep, devoid of gloss, real Russia». A number of his projects is implemented as a public-private partnership in the framework of the Federal target program «Development of domestic and inbound tourism in the

Russian Federation (2011-2018)». In this context public-private partnership represents the entry of private capital into the target program of the Federal or regional level, providing mainly infrastructure projects with mixed financing, where the federal target program forms the legal basis of public-private partnership.

Finally, the tourist-transport association «Slavyanka» is an example of a leading tour operator in the Ivanovo region. Beside a wide tourist activity, mainly within the «Golden ring» and the North-Eastern part of Russia, the tourist-transport association «Slavyanka» has created the guest house «Pestovo Sloboda» in the village of Pestovo of the Palekh municipal district of the Ivanovo region. Horse tours, hunting tours, ecological tours, weekend tours, event tourism, weddings, anniversaries, corporate events, entertainment programs for adults and children based on Russian folklore are implemented on this basis. The tourist-transport association «Slavyanka» has a wide experience of interaction with administrations of municipal districts on realisation of fairs and other events of municipal and regional level.

These examples of private stakeholders illustrate the breadth of entrepreneurial activity, and also serve as a timely reminder of the close links between public and private stakeholders in tourism development in the Ivanovo region.

CULTURAL ATTRACTIONS

Heritage is a key component in the attractiveness of Ivanovo region, and museums have increasingly come to play a part in the visitor economy.

The publically funded museum of *Ivanovo Chintz* is now a part of the Ivanovo state historical and local-historical museum named after D.G. Burylin. In the basis of the exhibitions of the Museum of Ivanovo chintz there is a unique collection of samples of fabrics from ancient times to our days. The acquisition of this collection was started in the late nineteenth century through the efforts of the Ivanovo-Voznesensk industrialist, art collector, philanthropist and enlightener D.G. Burylin. The museum collection, located in the Burylin's family house, has a great diversity, which reflect the folk art traditions, evolved over centuries and corresponded to the tastes of wide layers of the Russian population. Samples of the ancient Ivanovo chintz reveal a significant layer of folk art in yet underexplored area – the art decoration of fabrics. At the same time the Museum exhibitions tell the history of the textile industry in Ivanovo region on the course of four centuries. Special attention is paid to displaying textile products as works of decorative and applied art. Along with the story about the textile technology development the Museum shows the Ivanovo-Voznesensk manufacturers, whose dynasties began in the environment of the serfs, and the fabric artists whose work brought the worldwide fame to the Ivanovo chintz.

The only one of its kind in the world, Museum of Ivanovo chintz is a constant subject of the grant support of the investment fund of V. Potanin «A changing museum in a changing world». An actively visited exposition «Slava Zaitsev. Life=Creation» is functioning as a part of the museum. The Museum is a brand for the region, it is invariably included in programs of tourist and excursion service for the Ivanovo region visitors. The Museum has a regular creative contact with the Department of socio-cultural service and tourism of ISPU (Ivanovo State Power University), the result of which is, in

particular, implementation of the original joint projects: the museum show – the «visiting card» of the Ivanovo city – «Souvenirs from the Russian Manchester» and the exhibition-animation project «Burylin's undercrossing».

The P.N. Travkin archaeology museum centre in Plyos is one of the few private museums in the region. The museum is based on the results of archaeological research of its creator in Plyos and its surroundings. Museum visitors can get acquainted with the «archaeologist's corner», which clearly demonstrates the specifics of the work of archaeologists. The main part of the museum is dedicated to the reconstruction of the Plyos jeweller's estate of the XIII century. Another exposition of the museum is a reconstruction of the site of the Stone Age. The museum is widely using the interactive technologies in communication with visitors, it offers a wide spectrum of educational programs for students. It is important to note that the founder of the museum and its owner archaeologist, P.N. Travkin, is involved in the concept development for a number of projects, implemented in Plyos and other settlements of the Ivanovo region, and hence the museum engaged with the wider tourism development strategies in the region.

KNOWLEDGE INSTITUTIONS

The Department of Socio-cultural Service and Tourism of the Ivanovo state polytechnic university's Textile institute have educated more than 400 experts in socio-cultural service and tourism since 1998. The Department has close links with the authorities of the Ivanovo region and its municipalities, museums, travel agencies, enterprises of tourist infrastructure.

Since 1999 the Department completed the conceptual development of mechanisms for the revival of a large number of municipal districts on the basis of the tourism and recreation evolution. The main directions of research and design activity of the Department: actualisation of historical and cultural heritage; revival of traditional fair entertainment culture; development of new regional and interregional tourist routes; image development of the tourist infrastructure; museum staging; innovative approaches to excursion service; animation service in tourism and recreation. After the creation of the Inter-regional resource centre for training and retraining of personnel for tourism and hospitality of ISPU in the framework of the grant program «Tempus», the Department has increased its potential in training and retraining of personnel for tourism and hospitality.

5.3 Patterns of Cooperation

The cluster approach to tourism development, prevailed in the recent years, requires rather close connection between the different actors, operating in the sphere of regional tourism. The logic of the approach implies that instead of separate efforts to create some infrastructure objects and development of tourist products in many localities, efforts should focus on a particular area, possessing a sufficient natural and historical-cultural potential, and good transport accessibility. The aim of this spatial focus is to coordinate the activities of the state, regional and municipal structures interested in development of tourism, business, institutions of culture, education and to the local

population to turn the area into a zone of successful tourism, and thereby develop a tourist destination where tourists and guests can receive complex services of a quality required by modern travellers.

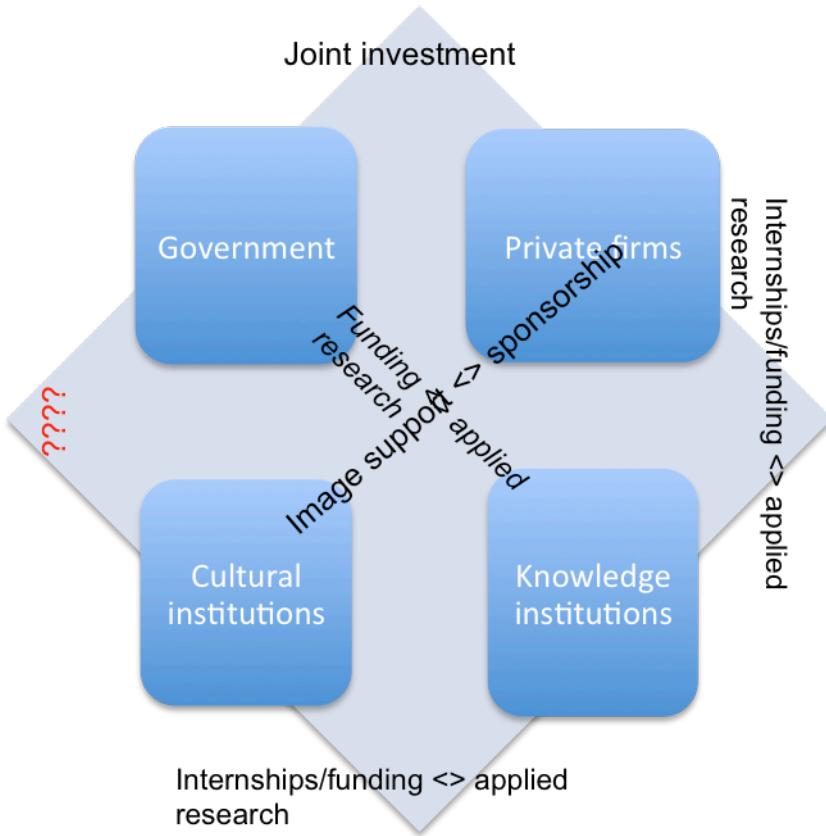


Figure 4. Patterns of collaboration in tourism development in Ivanovo region

As summarised in Figure 4, in the Ivanovo region relatively high levels of interaction and cooperation exist between different groups of stakeholders, all of which involve mutual exchange of resources between the parties involved. Six different collaborative axes can be identified:

- *Between regional/local government and private investors* -joint investment of public and private funding for tourism development projects constitutes the core around which collaboration is undertaken.
- *Between private investors and cultural institutions* -firms provide grant or sponsorship support of cultural institutions, while the latter support a positive image of private investors, e.g. by participating in their PR activities.
- *Between regional/local government and the universities* -public bodies commit the universities on a contract basis for research and development in connection with innovative and/or educational projects, and the universities provide scientific and methodological support of strategic and conceptual development and long-term programs.
- *Between private investors and universities* firms commit the universities on a contract basis with projects development and also provide student practices, while the universities carry out

conceptual work in relation to project development, as well as initiating new topics that can potentially attract the attention of private investors.

- *Between cultural institution and universities* the former provide internships for students and involve universities in joint implementation of projects/grants as part of Federal and municipal programs, while the universities use cultural institutions in their educational activities, and participate in joint projects/grants won by institutions of culture as part of federal and municipal tourism development programs
- *Between regional/local government and cultural institutions*

Of course, there are horizontal relations also between private investors working on the development of the same tourist destination. Unfortunately, often these relations take a character of too intensive competition. The interests of different private investors can apply to one and the same territory and have the goal of creation of infrastructural objects with the same functionality (for example, the construction of a new hotel). At the same time private investors are interested in partnership with state structures in order to solve the problems of infrastructure provision of the object (improvement of roads, provision of gas supply, sanitation etc.) by means of budget funding. In a competitive struggle there may be incidents when private business applies the methods of discrediting of the competitors in the eyes of the authorities with the use of «black PR» and other inappropriate methods.

5.4 Conclusions

In Ivanovo region public-private partnership is undoubtedly an effective mechanism for development of tourism and recreation. However, in our opinion, there are some serious circumstances, without overcoming of which the effectiveness of this mechanism can be reduced and even be under threat.

1. The inclusion of regional projects in the Federal target program, which is the only possible way of the considerable funds of the federal budget development, makes conditional upon the attraction of private investors to co-finance the projects. Therefore, the work of the region's administration and municipalities aimed at finding a sufficiently serious investors whose interests may not fully coincide with the declared aims of the project. So the real fundraising activities for the tourism development in the region are based on the search of compromises.
2. The public-private partnership should be based on a carefully designed and seriously examined by the public community development strategy of the region (in this case in relation to tourism and recreation). Otherwise, the predominance of group interests is inevitable, which may cause a misuse of funds and corruption.
3. Public-private partnership needs a more elaborate legal basis, which would clearly regulate the activity of all participants of this process. In conditions when the tourism on the territory does not function as an established mechanism, but, mainly, is created, it is very important that emerging patterns of public-private partnership acted in a clearly defined legal field, eliminating misunderstandings, different interpretations, breakdowns and illegal actions. In the contemporary Russian conditions the public-private partnership is still in its infancy, in the absence of a legally worked at the federal, regional and municipal levels «rules of the game»,

eliminating voluntarism and corrupt practices. However, the examples of successful partnerships between public and private institutions in the Ivanovo region are available. Such, for example, is the long-term work with the development of significant financial resources for creation of tourist-recreation cluster «Plyos».

4. The current practice of private-public partnerships in fact excludes the participation of small investors and their associations, because small, but sometimes very important, projects are simply not considered. For instance, public tourism development programs do not actually provide the financing of the development of quality tourist products, their promotion, advertising, organisation of press-tours, image development of the tourist industry enterprises within tourist destinations, and working with the local community. The creation of such tourist products is usually not possible for the province tour operators, and therefore there is a need to implement such designs by integrating the efforts of different actors e.g. in terms of public-private partnership.
5. Public-private partnership does not use the possibilities of public control over realisation of projects, which contradicts the understanding of tourism not only as a business, but also as a socially responsible sphere of human activity.
6. Public-private partnership practically ignores the problem of personnel training, and this actually means not only that the problem is not permitted completely, but also that it is not even raised.

Ivanovo is an interesting example of a region where public-private partnership is practiced to a relatively large extent, and therefore both the potential advantages and disadvantages are particularly visible. On the one hand, it clearly enables public and private actors to collaborate in major projects as part of overarching tourism development strategies through co-investment in especially new infrastructure – and at the same time, it has also assisted in bringing about more intensive collaboration and knowledge exchange between universities, private firms, cultural institutions and, indeed, government bodies. On the other hand, however, some limitations can also be identified: less attention is being afforded to 'soft' aspects of tourism development (e.g. product development, marketing, training), and large numbers of small actors would seem to be left out of the partnership process because of the absence of inclusion mechanisms targeting actors with relatively few resources at their disposal. The furthering of tourism development in the Ivanovo region will depend upon the extent to which a balance can be struck between building on existing positive experiences while at the same time moving towards a more inclusive approach, both in terms of types of policy interventions and stakeholders involved.

6 KEMEROVO: TOURISM IN A CARBON-ECONOMY REGION

6.1 Kemerovo as a tourist destination

Kemerovo region, often referred to as Kuzbass after the large coal basin occupying most of the region, was formed in the 1940s - 1950s as one of the principal industrial and commodity centres of the USSR. Coal mining, metallurgy and chemical industries were the core of the economic potential of the region. Tourist industry was not represented. It was only in the 1970s that the first ski piste appeared in the south of the region, in Tashtagol district, that tourism emerged as a significant form of economic activity, and later another centre in Tashtagol region – the Sheregesh skiing complex – was built for a major national sporting event, the Spartakiad of the peoples of Russia in 1981. In the late 1970s – early 1980s the touristic potential of Kuzbass was investigated, and as a result 12 tourist and recreation activities zones were identified, and this zoning is still relevant and used for planning purposes. The strategic course for the development of tourism in Kuzbass became particularly important in the early 21st century, due to the necessity to modernise the economy and the decrease in demand for coal and metal. Today the region possesses four leading mountain skiing centres (in Tashtagol, Mezdurechensk, Novokuznetsk and Tanay), and in parallel with this some historical and cultural centres are being developed, namely: the museum-reserves of "Tomskaya Pisanitsa" and "Krasnaya Gorka" (Kemerovo), Kuznetsk Fortress (Novokuznetsk), a complex of late 19th – early 20th century stone and wooden houses in Siberian Baroque style in Mariinsk, and Shestakovo paleontological and archaeological complex where remnants of the Siberian Psittacosaurus were discovered.

TABLE 4: Destination Kemerovo: Key data

	2012	Tourist arrivals ('000)		
		2011	2012	2013
Region / km ²	95,500			
Region / population	2763,000	Domestic	646	715
Region / person per km ²	28.9	International	54	41
Capital city population	533,00	Total	700	756
Tourism share of regional GDP	0.47			
Travel agents total	289			
Commercial accommodation facilities	183			

Sources:

1. Key data on tourism development in Kemerovo Region // Website of Kemerovo Region Department for Youth Policy and Sport – access address: <http://www.dmps-kuzbass.ru/tourism/development/> - accessed on 18.05.2014
2. Kul'tura, otdykh, turizm [Culture, recreation and tourism] // "Kuzbass" statistical yearbook 2012. – access address: http://www.kemerovostat.ru/bgd/EJEGOD/issWWW.exe/Stg/2012/9e_культура.htm
3. Kuzbass. 2013: statistical abstract. – Kemerovo: Kemerovostat, 2013. – P. 130-136, 224

The analysis of statistical data of Kemerovo region destination development in 2000 – 2013¹ shows considerable growth of one of the main rates – the inflow of tourists in the region. Compared to 10 years earlier, the flow of incoming international visitors has almost doubled, although in absolute numbers it remains overshadowed by incoming visitors from other parts of the Russian Federation.

The flow of tourists travelling to Kemerovo in 2012 almost doubled the rate of 2004, and these figures correlate with the constant increase in the numbers of out-going Russian tourists, reaching 126051 in 2013, and in general, the dynamics of both rates in the analysed period shows growth with a fall in 2009 due to the recession in global economics. At the same time, it is a well-known fact that about 50 % of Kuzbass tourists traditionally spend their vacation in their native region (58.4 % in 2000, only increasing to 52.9 % in 2012). Along with the flow of out-going tourists, the amount of marketed tourism, hospitality and health services for the population is growing as well. In 2000 these services afforded the region 31.2 million roubles, while in 2012 this rate was 107.5 times higher and amounted 3354 million roubles in nominal prices. In comparative measures the increase was even higher: from 0.04 % to 0.47 % of the regional GDP.

The number of tourist companies registered in Kemerovo region shows growth as well. There were 40 in 2000, and in 2013 their number reached 289. At that, the most considerable growth took place in 2010, when the number of tourist companies increased by 46.4 % in a year. Over the past three years, their number increased from 253 to 289. Regrettably, most of the enterprises specialise in outbound tourism, while domestic tourism is a minor accompanying sphere of the companies' activity. The rates of tourist companies' activity (the number and cost of the sold tourist packages) grew along with their number. From 2005 to 2012 the number of tourist packages sold increased by 6.1 times: from 10.4 to 63.7 thousand. The cost of the packages sold to Kuzbass citizens in 2005-2012 increased by 11.9 times in nominal prices (from 307.3 to 3659.6 million roubles), if compared to the year 2000, it increased by 63.2 times. In comparative measures, the amount of sold package tours increased from 0.07 % of the regional GDP to 0.1 % of the regional GDP in 2005, and 0.51 % of the regional GDP in 2012. Similar to the flow of tourists in general, the growing dynamics of these rates was interrupted in 2009. Regrettably, the increase in out-going and domestic tourism didn't lead to the expected results: qualitative and permanent growth of revenues for the region and the state. In particular, as far as tax revenues are concerned, they are quite irregular. Tax revenues amounted 907.3 million roubles in 2011, 1299.3 million roubles in 2012, and 1063 million roubles in 2013, and this underlines the lack of financial stability in the region's tourism industry.

Accommodation rates did not grow significantly over the period studied. Despite the fact that in 2000-2012 the number of collective accommodation facilities has grown by 20 (from 163 to 183), the increase amounting 12.3 %, the dynamics within the period is unstable. During the economic recession of 2009, this number decreased: there were 151 in 2008-2009 and 153 in 2011 and by 2012 (183) it failed to reach the pre-recession rate (188 in 2008). In 2013 the number of collective accommodation facilities remained the same as in the previous year. The number of nights spent in the facilities over the studied period decreased by 17.6 %: from 2635.8 thousand in 2000 to 2170.6 thousand in 2012.

The number of people staying in collective accommodation facilities grew progressively from 303.6 thousand in 2000 to 369.5 thousand in 2012, the increase over 2000-2012 reaching 21.7 %. However, the comparison of the number of tourists entering Kemerovo Region with that of tourists staying at commercial accommodation facilities shows that the former exceeds the latter almost twice: 699.96 to 369.5 thousand people in 2012. This fact shows that about a half of tourists stay at rented apartments and houses or with their friends and relatives, or stay at small accommodation facilities whose activity is not taken into account by the state statistical authorities since 2008.

The extremely rich natural complex of Kemerovo region allows developing different types of tourism, namely: mountain skiing, cross-country skiing, water tourism, hiking, cave exploration tourism, horse-riding, snow tourism, historical, cultural and ecological tourism and other. However, in reality, mountain skiing accounts for about 70 % of tourism flows in Kemerovo region. This type of tourism is developed in 16 municipal units. The growth of winter tourism popularity in Kemerovo region is due to the availability of a well-developed infrastructure and the length of the skiing season which starts in early November and finishes in early May. As the historical and cultural and natural values of Kuzbass have a much lower demand outside the region, most of the tourism industry in the region is therefore seasonal.

6.2 Key actors: resources, strategies and collaboration

This section identifies the key actors in tourism development in Kemerovo, focusing in particular on the resources, strategies and patterns of collaboration in shaping the future of the regional visitor economy.

PUBLIC AUTHORITIES

In Kuzbass, tourism is under the jurisdiction of Deputy Governor for Education, Culture and Sports. It is supervised directly by Kemerovo Region Department of Youth Policy and Sports, which embodies the Department for Tourism in its structure. It is the Department for Tourism that coordinates the tourism policy of Kemerovo region. It has the key role in developing the Strategy for Development of Tourism in Kuzbass. The main aim of the Strategy is to form the tourism-and-recreational complex in Kuzbass to deal with in-coming and out-going tourism flows and involving well-developed modern tourism infrastructure. In general, the Strategy lists the priorities for the development of tourism policy in Kemerovo region; analyses the current state of tourism industry in the region; suggests the possible scenarios for the development of tourism in the region. The Strategy also comprises a paragraph on the stages and terms of its implementation. The Strategy for Development of Tourism in Kuzbass sets the following tasks:

1. Improving the legal base for the tourism sphere.
2. Support and development of the key types of domestic and inbound tourism (skiing tourism, sports tourism, health tourism, rural tourism, heritage tourism, business tourism, snow tourism, adventure tourism and ecotourism).
3. Improving the quality and competitiveness of tourism services and related services to meet the international standards.
4. Stimulating the development and upgrade of tourism infrastructure and related infrastructure (transportation, catering, entertainment, education etc.).
5. Upgrading the level of tourism security
6. Advertising, information support and branding of Kemerovo Region as a tourism region

7. Development of inter-regional cooperation in the sphere of tourism with the other regions of the Siberian Federal District

At the municipal and city district levels, these functions are exercised by special boards/departments of city and district administrations. As far as the capital of Kuzbass is concerned, this role belongs to Kemerovo City Board for Culture, Sports and Youth Policy, which coordinates the activities of the city's cultural and touristic centres.

The role of binding regional authorities and the business community belongs to Kemerovo region Governor's Public Tourism Council. The Council is a deliberative body providing for interaction, coordination and consistency in the activities of the executive bodies of state power in Kemerovo region, local government bodies, public tourism organisations, educational institutions and tourism industry entities. The Council comprises the representatives of the principal public organisation in touristic sphere and the most prominent cultural organisations and mass media, some representatives of hospitality industry (big hotels), as well as cultural organisations, e.g. museums etc. that function as tourism attraction.. The representatives of the universities providing training in Tourism are invited to attend the meetings of the Council.

Since 2012, Kemerovo State University, which is providing training in Bachelor's and Master's Degree programmes in Tourism, has been actively looking for some forms of cooperation with the business community and the regional authorities in order to promote the development of tourism in Kuzbass. Thus, the activity of Kemerovo Region Tourism Resource Centre established in 2013 within the Tempus TOULL project, has been supported by Kemerovo Region Governor's Public Tourism Council.

In May 2015 Kemerovo State University along with Kemerovo Region Department for Youth Policy and Sport and Department for Culture and National Policy organised the international conference "Tourism Destination Development: Mechanisms, Challenges and Prospects", where a round-table discussion was held with representatives over 30 of tourism companies. The participants declared their interest in collaboration for training highly competent staff for the tourism sphere of Kuzbass and undertaking joint information projects to promote Kemerovo Region tourist destinations.

Finally, in April-May 2015 Kemerovo State University along with Kemerovo Region Administration Department for Investments and Strategic Development and Centre for Cluster Initiatives Development elaborated the "Strategy of Kemerovo Region Tourism and Recreation Cluster Development for the period until 2025"² which was adopted by the Kemerovo Region Administration Board on 3 June 2015 and the received the support of the Russian Federation Ministry for Economic Development.

«Tourism and Recreation Cluster of Kuzbass» was established on 13 October 2015 during the kick-off strategic session where the "Agreement on the establishment of Kemerovo Region Tourism and Recreation Cluster" was signed by 33 participant of the session (25 tourism enterprises, 3 municipal tourism organisations, 2 universities, Heads of 2 department of Kemerovo Region Administration and the Director of OAO "Kuzbass Technological Park" that houses the Centre for Cluster Initiatives Development). Kemerovo State University is the coordinator of the activities of the Cluster.

The strategic purpose of Kemerovo Region Tourism and Recreation Cluster in the long term (for the period until 2025) is to increase the competitiveness of tourism and recreation enterprises, promote

domestic tourism products, as well as expand the range of tourist services in the region.

Creation and development of the Cluster will facilitate:

1. Development of the tourism complex of Kemerovo Region as the centre of domestic and inbound tourism.
2. Development of tourism infrastructure, providing material and technical base and the development of cooperation between the enterprises of the Cluster, and the promotion of enterprises of related industries - catering, entertainment, production of souvenirs etc.
3. Improvement of information exchange efficiency and coordination of business, scientific and educational organisations, government bodies and local authorities in the tourism industry.
4. Establishment of research and educational complex in tourism industry, providing methodological and staff support to the Tourism Cluster development.³

In other words, an ambitious long-term programme that will require extensive collaboration between public and private partners in order to succeed.

BUSINESS COMMUNITY AND REGIONAL TOURISM ASSOCIATIONS

In the Kemerovo region private tourism stakeholders have joined together in several organisations in order to promote common interests.

The *Kuzbass Association of Tourism Industry Enterprises (KATI)* was founded in 2003. It embraces 15 enterprises mainly located in Kemerovo, the administrative centre of Kuzbass. Its key activities include: development and promotion of regional tourism products; broadening the geography of charter programmes; re-orientation of out-going tourists towards the domestic tourism market; functioning as the corporate customer at exhibitions and fairs; protection of legal, economic and other interests of tourism enterprises. KATI actively collaborates with Kemerovo Region Administration and functions as the representative and lobbyist of regional tourism industry. In particular, when the Strategy for Development of Tourism in Kuzbass till 2025 was devised, it was reviewed and approved by the Coordinating Council of KATI as well as the Kemerovo Region Governor's Public Tourism Council, before it was approved by the governing Kemerovo region Administration Board.

At the same time, a number of other influential organisations have been established. In particular, on 21 July 2009, a new organisation named "South Kuzbass Non-Profit Partnership of Tourism Industry" emerged. In 2012, it was the first in Russia to receive the status of self-regulating organisation of tour operators and travel agents (Registry No. 0268, Registry date: 29.06.2012); it was then renamed as Self-Regulating Organisation *Kuzbass Non-Profit Partnership of Tourism Industry*. It comprises over 30 tourist companies operating mostly in the South of Kemerovo Region, namely: travel agents, tour operators for domestic, in-coming and out-going tourism, hotels of "Sheregesh" Sports and Tourism Centre. Since 2012, Kuzbass Non-Profit Partnership of Tourism Industry established a compensation fund, which was done with the partner-companies' money to serve as double financial liability for consumers of tourist products. The Partnership introduced some standards and rules for tourism activities based on federal laws to be observed obligatorily by all its members. In the North of Kuzbass it is represented quite fragmentarily, but it is running a very active PR-campaign to promote its interests in the spheres of government, education and culture.

Finally, the *Kemerovo Region Federation for Sports Tourism*, registered in 1998, organises and holds mass sportive, touristic and health-improving events, provides training and re-training of personnel,

certifies tourism enterprises and personnel, and runs preliminary procedure in applications for awards. The Federation comprises 428 members. Meanwhile, over 300 thousand citizens of Kemerovo region take part in sports and tourism, competitions and camping trips annually.

It hardly a coincidence that the three non-governmental organisations mostly deal with the three key types of tourism listed in the Strategy for Development of Tourism in Kuzbass, which have the biggest potential for development as far as tourists flows and the number of created jobs are concerned. Those are mountain skiing tourism, cultural and historical tourism and sports tourism.

CULTURAL ATTRACTIONS

As far as their resources, influence and elaborated strategy of tourism development are concerned, the positions of the region's museums are quite modest, regrettably. The museum-reserve "Tomskaya Pisanitsa" must be the only one known outside the region. "Kuznetsk Fortress" (Novokuznetsk) and "Krasnaya Gorka" (Kemerovo) aspire both to gain the title of the city's historical and cultural centres and to attract in-coming and foreign tourists. Regrettably, most museums lack financial and informational capacities for self-promotion outside the region. Museums are funded by federal and regional authorities, non-budgetary incomes making a small part of the budgets of most museums, and hence the incentive for museums to transform themselves to cultural attractions with relevance for the visitor economy is rather limited.

KNOWLEDGE INSTITUTIONS

No integrated School of Tourism has yet been established in Kuzbass, and thus the development of Tourism education in the region is based on interdisciplinary schools. For a long time T. F. Gorbachev Kuzbass State Technical University was monopolist in training students in "Tourism" and "Service". The profiling of universities, introduced by the Russian Government, has led to Kuzbass State Technical University not training students in "Tourism" any more (but for its branch). The initiative was slowly passed to other universities. Thus, Kemerovo State University for Culture and Arts set up a degree course on Tourism on the basis of "Museology" and some other interdisciplinary majors.

The evolution of "Tourism" as a major in Kemerovo State University was complicated. At first, the Bachelor's Degree course, Master's Degree course and advanced professional education course were distributed among 3 faculties. This scheme did not prove effective, and today a new structure is being formed, with the Faculty of History and International Relations as its core and the participation of other profiled departments. It is on the basis of this structure that the formation of Kemerovo Regional Centre for Tourism Industry started, providing a platform for knowledge dissemination, life-long learning and informed dialogue with and between public and private tourism stakeholders in the region.

6.3 Patterns of Cooperation

At the time of writing (2015), two relatively isolated zones have emerged in the real model of interaction between regional and local authorities and business in Russia: the white zone and the grey zone (the division of interactions between the authorities and business into three zones – white, grey and black, can be found in the works by many scientists, e.g. V. Tambovtsev, M. V. Kurbatova, S. N. Levin etc.).⁴

The so-called *white zone* embraces the formal interactions between authorities and business: taxation regulation, administrative and economical regulation of business (registration, licensing, control and enforcement of the set norms etc.), state orders competition, implementation of regional programmes for tourism development, assistance to the development of investment attractiveness of Kuzbass tourism industry. As expert evaluation shows, in the rating of RF entities investment attractiveness Kemerovo region belongs to the group of borrower regions with a high level of liability. In 2011 the region ranked 11th in Russia by the number of investments in fixed capital.⁵

In the Strategy for Social and Economic development of Kemerovo Region till 2025⁶ the development of the recreational sector infrastructure is one of the main investment priorities of the region's development. At the same time, the development of separate spheres, including tourism, will depend on the region's success in solving overall infrastructure tasks. Thus, the development of touristic and energetic infrastructure remains one of the top priorities. The work of "Sheregesh" ski resort is a vivid example of such parallel development. The building of the complex required over 2 billion roubles of private investments, but in 2010 the resort was just visited by over 320 thousand Russian and foreign tourists.⁷ The project is implemented in compliance with the Strategy for Social and Economic development of Kemerovo Region till 2025 and the Programme for Social and Economic development of Kemerovo Region till 2012. The project represents another stage in developing the "Sheregesh" Touristic Complex in Mount Shoriya into a year-round resort for winter and summer recreation of tourists, with a view to also appealing to the international market. Another example of interaction within the "white zone" is the creation of the regionally favoured economic zone⁸ of touristic and recreational type "Mountain Shoriya", where member companies are provided with all the privileges and preferences according to the regional laws. It resulted from interaction between private companies (tourism infrastructure operators) and the efforts of the regional authorities to attract potential investors. It should also be recalled that the sectoral strategy for development of tourism within the Kemerovo region was elaborated in dialogue with a wider partnership of private and public stakeholders, thus giving public planning for tourism development a foundation beyond regional government itself, in contrast to the more centralised approach adopted in the neighbouring Tomsk region.

The so-called *grey zone* embraces the bilateral informal interactions between business and authorities, along with some formalised forms. In these cases regional and local authorities use their administrative resource to force businesses into making some additional provisions for some needs valuable for the community. At the same time, the entrepreneur receives the guarantee that their position will not deteriorate, or is even promised some privileges. Thus, the "grey zone" encounters

high-status bargaining of business with authorities concerning the conditions of its operation, which means that the process of negotiations takes place, with both parties protecting their own interests.⁹

When solving the problem of government budget balance, federal authorities expanded the functions and powers of regional and municipal authorities, but reduced their sources of financing considerably. Under these conditions applying to businesses for additional financing became the only means of authorities' "survival", while for businesses these voluntary or "voluntary compulsory" contributions became the instrument for achieving their goals.

The main ways of attracting additional funding from businesses are "quasi-tax" levies and "organised sponsorship". *"Quasi-tax" levies* are additional payments that businesses have to make to the local budget or some specially created funds, beyond those implied by laws. *"Organised sponsorship"* implies businesses participating in funding different projects of the administration (social projects, organisation of public services and amenities etc.).¹⁰ Unlike "quasi-tax" levies, "organised sponsorship" is purpose-oriented, and businesses make their contributions mostly in kind.

Researchers estimated that annual additional funding from businesses reaches 110 billion roubles (about 3 % of the consolidated budgets of Russian federal entities).¹¹ This practice is widespread in Kemerovo region. Thus, in January 2004 after losing 156.6 million roubles of cancelled taxes, the authorities of Kemerovo city invited entrepreneurs to make regular voluntary contributions for the social development of the city.¹² In February 2004 the agreement on partnership in the sphere of the city's social development was signed in Kemerovo city administration; it implied enterprises paying 1 % of their salary budgets. In return for the payments, the authorities promised to soften administrative barriers, to take into account the recommendations for facilitating the development of enterprises, and to develop a programme of supporting local commodity producers.¹³ Kemerovo region Department of Economic Development estimates that according to the signed agreements, in 2006 the leading enterprises, companies and holdings contributed about 4.8 billion roubles to the social sphere.¹⁴

A vivid example of interaction within the 'grey zone' is the practice of "quasi-Public-and-private partnership" in the form of agreements on social and economic cooperation between authorities and business groups. The key subjects of agreements between authorities and large-scale businesses in Kuzbass (those are mostly coal mining enterprises which own middle-scale or small-scale tourism enterprises) are: increasing the amounts of production; investing in production development; capital maintenance; building and construction; establishing safe working conditions. Realisation of national projects in the region and implementation of regional social programmes remain important objects of expenditure. The list of large-scale enterprises and organisations to receive systematic support at the regional level was defined. In 2010 it included 121 enterprises, most of which had signed agreements on cooperation with Kemerovo region Administration. This practice is well-developed at the municipal level as well. Namely, since early 2014 Kemerovo city Administration and its subordinate organisations have made 1581 agreements on social and economic partnership.¹⁵ Both large-scale and small-scale and middle-scale enterprises, regardless of their business and legal form, take part in social and economic partnership.

Thus, the main interactions between the authorities and business in the tourist destination, both facilitating and simultaneously hindering the Public-and-private partnership in the sphere of tourism, exist in the "grey zone" as "quasi-Public-and-private partnerships" in the form of agreements on social

and economic cooperation between authorities and business-groups operating in the basic fields of Kuzbass economy. The practice of “quasi-Public-and-private partnerships” in Kemerovo region has a controversial influence on the development of Public-and-private partnership in the regional economy.

On the one hand, this practice shows that close interaction with regional and municipal authorities has become a norm of doing business in Kuzbass for business-group owners and managers. The authorities deliberately orient businesses at partnership and support of social programmes. The details of agreements show that despite having an investment component, in particular for developing tourism industry, they are mostly oriented at using the resources of businesses for implementation of social programmes and maintaining social and economic stability in the region.

This state of affairs cannot be changed in the near future, since the reasons for the development of “quasi-Public-and-private partnerships” practice and the “grey zone” of interaction between business and the authorities in general are beyond the power of regional and municipal authorities. Under the conditions of budgetary deficit, the authorities have to resort to demanding “voluntary compulsory” contributions for additional funding of their liabilities, as it remains the only way of the region’s “survival”. Thus, it is difficult to expect regional and municipal authorities to be interested in transforming “quasi-Public-and-private partnerships” into Public-and-private partnerships in which business will be more independent from government and less dependent on decisions of government officials.

6.4 Conclusions

In Kemerovo region the system of PPP in tourism is developing along a number of key directions. First, since the early 2000s the regional authorities have supported the most relevant tourism and recreation destinations (Sheregesh skiing complex and “Tomskaya Pisanitsa” museum-reserve). With financial and organizational support from the federal and regional authorities, the favourable economic zone “Mountain Shoriya” was established, the infrastructure of Mountain Shoriya destination was significantly modernized and upgraded. Over 10 billion rubles was invested in the Sheregesh complex. In 2015, with state support the project of Sport and Tourism Cluster “Sheregesh” was developed to attract private investments.

In 2015, in the Centre for Cluster Initiatives of the Kuzbass technological park, the Kemerovo Region Tourism and Recreation Cluster was launched, funded by the RF Ministry for Economic Development and approved by the Council of Kemerovo Region Administration. The strategic aim of the project is to establish the system of PPP with small-scale and middle-scale businesses. Funding is provided for the cluster initiatives of tourism businesses in the spheres of market research, business-plan development, cooperation with media, holding and participating in exhibitions, training personnel. The Cluster is coordinated by Kemerovo State University represented by KemSU Tourism Resource Centre. The TRC coordinates the activities of the Council of the Cluster. The members of the Cluster and those of the Council of the Cluster are representatives of tourism industry, the authorities, universities and museums of Kemerovo Region. Besides, Kuzbass Tourism Information Centre was established on the basis of the TRC. The main task of the TIC is the informational promotion of

Kemerovo Region resources and businesses via the web-portal <http://visit-kuzbass.ru> and other informational materials. The pattern of collaboration of the key tourism stakeholders in Kemerovo Region is summarized in Figure 5 below.

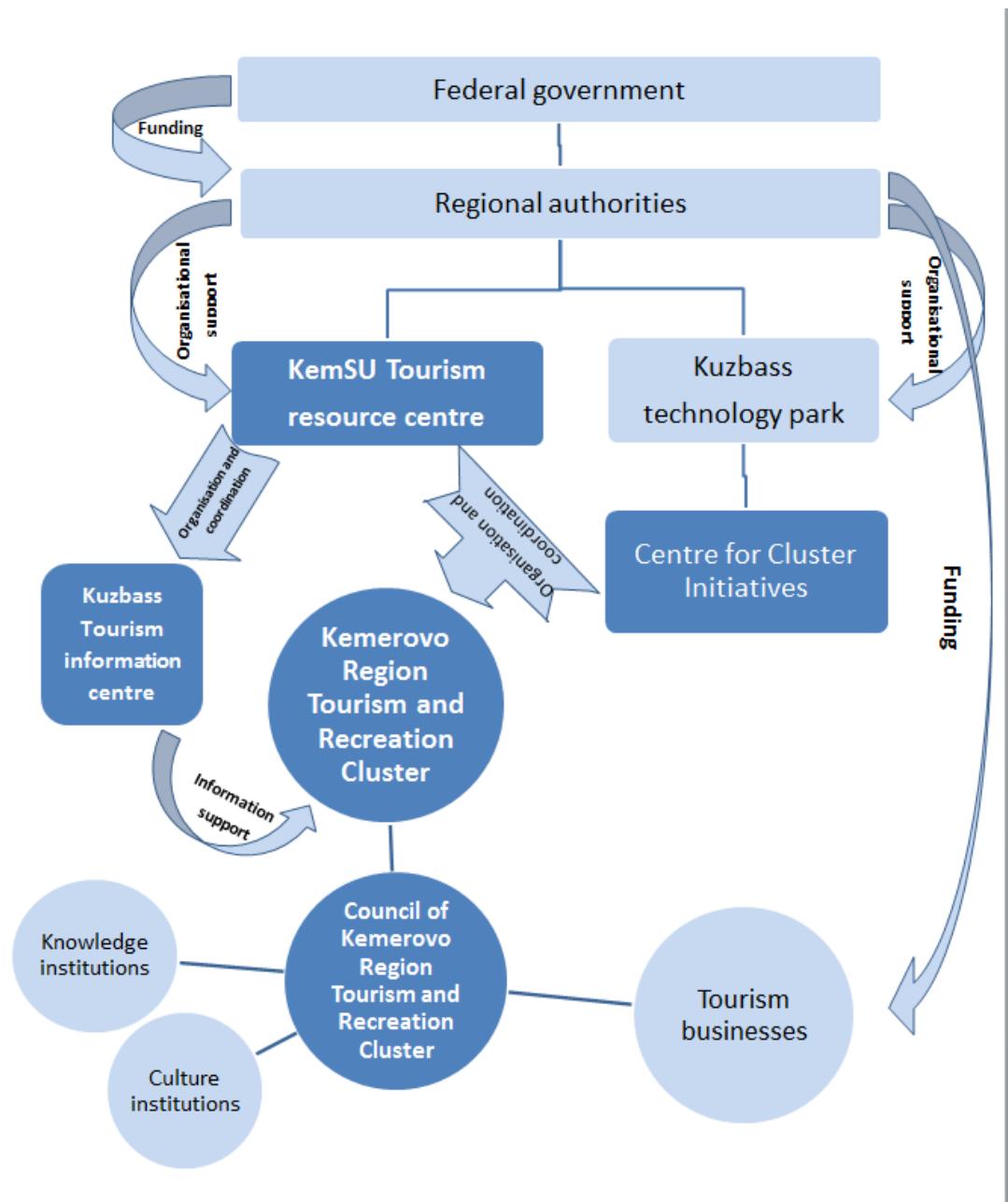


Figure 5. Patterns of collaboration in tourism development in Kemerovo region

In general, we can state that the establishment of Kemerovo Region Tourism and Recreation Cluster has led to the emergence of the mechanism for interaction, cooperation and partnership between the stakeholders, which brings hope of overcoming the problems and challenges that were previously encountered in the sphere of tourism in Kuzbass. However, at present the Cluster is being developed due to federal funding, while private actors, though actively involved in all the activities, have so far

been quite reluctant to invest any funds. Thus, if the system of cooperation within the Cluster is not elaborated, or if the federal funding of the project is stopped, there might be no further extensive partnership between business community and educational and cultural institutions. Finally, both in Kemerovo Region and in Russia, despite the proclaimed course promoting the necessity of post-industrial economy formation, most attention is still paid to the traditional industrial spheres: coal mining, metallurgy etc. That is why tourism and investments in this sphere still depend directly on the situation in the energy and metallurgy markets.

7 ALTAI KRAI: MORE HEALTHY TOURISM?

7.1 Altai Krai as a tourist destination

The region Altai Krai is located in the south-east of Western Siberia. The territory of the region is 168 thousand square km. and borders with Novosibirsk Oblast to the north, Kemerovo Oblast to the east, with the Republic of Altai to the south-east, and to the south and west the state border with the Republic of Kazakhstan. Altai Krai consists of 60 administrative districts, with 12 cities, the largest of these by far being the regional capital of Barnaul.

Tourism resources of the region are varied. While much of the territory is flat, the landscape of the south-eastern part is mountainous. The climate is temperate continental, with hot summers and cold winters. The main waterway is the River Ob, formed by the confluence of the rivers Biya and Katun. There are 11,000 lakes in Altai Krai, 230 of them with an area of 1 square km or more. The territory of Altai Krai has reserves of mineral medicinal waters used for external and internal treatments and mud. The total area of forests in Altai Krai is 26% of the entire territory, mostly covered by the coniferous trees, and many national and local parks and protection areas have been founded in the region.

Altai Krai is the most developed tourist region in Western Siberia, leading the region in healthcare and technology. 5-7 natural recreational and therapy destinations located in the territory of Altai Krai districts are internationally recognised in quality services. Tourists are attracted by plenty of natural sites and landmarks - forests, mountains, ridges, caves, lakes, rivers, landscapes, a big range of species, and a variety of large reserves of mineral and biological resources as well as unique cultural and historical heritage. Natural and climatic conditions of the region allow developing different types of tourism – plus, of course, functioning as a gateway to the adjoining mountain regions due to Altai Krai's extensive transport infrastructure.

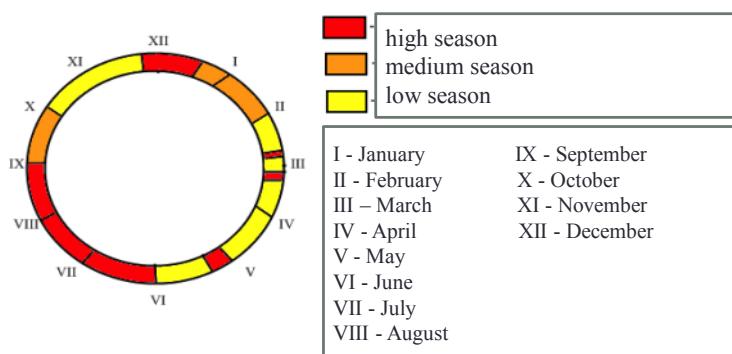
Centres for tourism in Altai Krai are the following areas: Altaysky area (Altaysky village, Lake Aya and tourist zone "Biryuzovaya Katun"), the city-resort Belokurikha, Gorny Kolyvan, Zavyalovsky area, Yarovoye beach area and recreation facilities at numerous lakes. Moreover, tourism in the region is growing due to the development projects such as Russia's largest special economic zone for tourism and recreation "Biryuzovaya Katun" and the gambling zone "Siberian Coin". The special economic zone for tourism and recreation «Biryuzovaya Katun» occupies the area of 3326 hectares on the left riverside of the Katun. The total investments are 3,83 mlrd roubles including state, Krai and municipal levels, as well as private funding. The development includes a health improvement and touristic complex for 3,5 thousand people, with four hotels and additional seasonal accommodation facility, as well as 3 alpine skiing tracks, artificial lake and hiking areas. The gambling zone «Siberian Coin» is situated not far from «Biryuzovaya Katun» and consists of two hotel complexes with casino and two business-hotels, built by private investors based in Kemerovo.

TABLE 5: Destination Altai Krai: Key data

	2012	Tourist arrivals ('000)		
		2011	2012	2013
Region / km ²	168,000			
Region / population	2420,000	Domestic	1000	1200
Region / person per km ²	14.4	International	370	478
Capital city population	700,000	Total	1370	1678
Tourism share of regional GDP	N.a.			
Travel agents total	250			
Commercial accommodation facilities	590			

Sources: <http://ak.gks.ru>

In 2013 Altai Krai won the national award "My Planet 2013" in the nomination "The best region to travel in Russia", but still an important characteristic affecting the growth of tourism activity in the region is its marked seasonal character, as illustrated by Figure 6, with summer and winter being the main seasons and autumn and, especially, spring experiencing limited activity.

**Figure 6. Seasonality of tourism in Altai Krai.**

Source: Dunets A.N. Territorial organization of mountain tourism and recreational systems (using the example of Altai-Sayans region): monograph / A.N. Dunets. – Barnaul: AltSTU publishing house, 2009. – page 167.

In 2013, more than 940 tourism enterprises operated in the tourism sector. 663 of them provided lodging services for tourists. 184 hotels, 44 healthcare resort facilities, 149 camp sites and recreational organisations, 186 "green" cabins and 73 children camps ensured leisure and recreation for guests in Altai Krai. The simultaneous guest capacity in tourist, recreational, health resort establishments, "green" cabins and health facilities for children counts to 46.5 thousand units, including year-round - 18.7 thousand units. In 2013, out of 250 travel firms that sold tour packages in Altai Krai, only 28 organisations provided excursion/tour services for incoming tourists.

In 2013 the number of people employed in tourism business grew to 16.3 thousand people, and an analysis of tourism and hotel businesses in Altai Krai in the period 2009-2013 has demonstrated that the private sector is dominated by micro-enterprises and individual entrepreneurs, making up 90.1% of the total number of travel agencies surveyed in 2013 (calculated on the basis of <http://ak.gks.ru>).

The main purposes of city hotels visitors (Barnaul, Biisk) are business and professional, some of them stay here as transit tourists, e.g. on the way to the adjoining mountain areas. As for visitors of

accommodations in recreation zones, the main purposes for them are, unsurprisingly, leisure and health improvement.

Tourism in Altai Krai perceived as one of the key priorities for economic development within the region, as can be seen from the long-term special-purpose program "Development of tourism in Altai Krai" for 2011-2016, as the growth of the tourism market has a positive mark on the growth of the regional economy and social life.

7.2 Key actors: resources, strategies and collaboration

This section identifies the key actors in tourism development in Altai, focusing in particular on the resources, strategies and patterns of collaboration in shaping the future of the regional visitor economy.

PUBLIC AUTHORITIES

In Altai Krai the regional level is crucial in terms of tourism development, operating through the *Administration for the Development of Tourism, Recreation and Health Resort Industry* of regional government. The overall strategy is outlined in the long-term special-purpose program "Development of Tourism in Altai Krai" for 2011-2016, where the long-term aim is defined as establishing a modern tourism industry with an increasing contribution to socio-economic development in the region. The methods through which this is going to be achieved is a cluster approach to touristic infrastructure development that concentrate development efforts in selected localities and combines public – federal, regional, municipal – and private capital as well as scientific support in order to further touristic development.

It is the Altai Krai executive authority body that ensures the realisation of the federal tourism policy in the region. It designs the development plans of special economic zone for tourism and recreation "Biryuzovaya Katun", the "Siberian Coin" gambling zone, and other long-term special-purpose programs in regional tourism, as well as participating in federal development programmes.

The tourism development work of the regional administration is supported by the so-called Public Council, founded in 2013 as a consultative body. The purpose of the Public Council is to strengthen cooperation ties with public associations, academic institutions and other non-profit organisations; to coordinate their efforts for more effective implementation of programs and strategies in tourism. Members of the Public Council are the members of the regional public organisations, directors of major accommodation facilities, tourist companies, trade unions and educational institutions.

PRIVATE TOURISM STAKEHOLDERS

Also in Altai Krai we find examples of three different types of non-government actors in tourism, namely private leisure resorts, travel agencies, and collective associations representing the collective interests of private firms, examples of each of these are presented below.

A prime example of a private tourist complex is "*Belokurikha Resorts*", today one of the leading health resort associations not only in Siberia, but also in the Russian Federation. It is the main enterprise in the city of Belokurikha, it can accommodate 1,600 persons at the same time, and about 30,000 receive medical treatment and recreation in Belokurikha health resorts/sanatoriums every year. "*Belokurikha Resorts*" Ltd. operates 3 sanatoriums (healthcare resorts), a clinic, one-of-a-kind "Water World" wellness centre where leading-edge practices in hydrotherapy are implemented, sports complex "Siberian village" which is fully equipped for comfortable and effective methods of animal breeding raw-based treatments (a kind of treatment based on Siberian animal breeding raw material). "Stables" is another tourist destination situated in Belokurikha Resort that offers guests services of horseback riding, fishing and related therapies.

"*Belokurikha Resorts*" has its own funds and attracts external investments as well, and provides most of its varied personal and technical services in-house. In addition to its official website, www.belokurikha.ru, the organisation has 16 additional sales offices across Russia. All resorts of "*Belokurikha Resorts*" have the certificate of quality spa services of the highest category. The resort health centres are rated "three stars" in terms of accommodation quality assessment, and trained medical staff are employed and have participated in the development of new treatments in numerous areas.

The tourist firm "*Belokurikha – Travel*" has been a key actor in the fast-growing tourism market in Belokurikha and Gorny Altai since its establishment in January 2001. It has entered the single state register of tour operators for domestic tourism since 2010, its operations are based on its own private funds, participate in regional exhibitions and workshops, and provides services for incoming travellers, including those going to the local health resort. The firm has a clear commitment to marshalling professional tourism competences in the visitor economy, and its growth exemplifies the possibility of major resorts developments having positive trickle-down effects for local entrepreneurs.

Finally, the tourism trade association "*Altai Regional Tourism Association (ARTA)*" has 32 tourist organisations in Altai Krai as members, as well as three higher education institutions in Barnaul and one insurance company. 26 tourist organisations have a record of service of more than 10 years in the tourist market. Managers of firms have higher education competence and practical experience in tourism for, at least, 10 years. 8 members of the association operate tour business for home and international tourism and offer travel agent services. 24 members offer only travel agent services, but although its membership reflects the overall outbound orientation of the tourism trade in Siberia, ARTA is nonetheless also engaged in promotion of tourism development within the region. Funds are raised from entrance fees in the amount of 3000 roubles by new members and the annual membership fee in the amount of 3000 roubles, and in addition to this members of the Association also mobilise funds for various development projects.

ARTA member companies have successfully developed and implemented tourist routes, participate actively in the development of historical and cultural potential of Altai Krai, and cooperate with tourist agencies of Russia and European countries ARTA members have more than 10 year participation experience in regional and international professional exhibitions (Toursib, Sportsib, MITT, ITM, MITF, Tourism / Leisure, etc.), and three members of ARTA are active in nationwide professional associations and alliances. Staff of ARTA member companies regularly increase their professional competence, attend university-level training courses, on-line conferences and seminars held by the Association of Tour Operators of Russia and the largest legal and marketing companies in the tourism sector.

CULTURAL ATTRACTIONS

Also among the cultural attractions in Altai Krai diversity reigns, as the following examples will demonstrate.

A typical example of a publically funded cultural attraction is the *V.V. Bianki Local History Museum* in Biysk. The museum was founded in 1920. Currently Biysk Local History Museum features a total of 18 rooms of permanent exhibitions, over 25 annual exhibitions, more than 60,000 visitors and 43 staff members. The museum lists more than 140 thousand historical artifacts and 20,000 books. One of the departments of Biysk Local History Museum is so-called Chuisky Tract Museum, a regional- status architectural monument and Russia's only museum dedicated to "the road", including the Chuisky tract highway that leads from Siberia over the high mountains to Altai. As of 2010 the status of the museum is of a non-profit institution funded from the City of Biysk municipal budget.

Biysk Local History Museum website was created and supported by Biysk Technological Institute (a branch of I. I. Polzunov Altai State Technical University), supported by the Altai group of companies "Employee», and associated with national networks such as the Museums of Russia portal.

43 employees with their own research interests work at the museum, and the museum's development strategy is based on the idea of a cultural institution as open and accessible to the public.

Biysk is also home to a rather different, NGO-driven, cultural attraction, namely the *Biysk Altai Spiritual Mission History Museum*. The museum opened its doors in 2008 on the territory of the regional historical and architectural complex monument - a former Biysk Bishops Monastery - Altai centre of Orthodox life in 1880 - 1919. 94,000 tourists have visited the museum in the period 2008-2014, and 2800 tours have been delivered for visitors. 15 exhibits are displayed in the only church museum of the region, focusing especially on the life of bishops. The valuable exhibits feature incunabula and manuscripts of XVII-XIX centuries, the bishop's ceremonial robe embroidered with gold and ancient icons. Biysk diocese of Greater Diocese of Barnaul and Biysk office of Demidov fund initiated the foundation of the museum, and thus the main funding is non-governmental, and a significant part of the exhibits have been donated to the museum. The museum participates in exhibitions (e.g., in March 2014 the museum took part in the International Tourism Exhibition "ITM 2014"). The strategy of the museum is to study and promote the history of Orthodoxy in Biysk and Altai Krai, especially to tell the story about Orthodoxy as an important part of Russian cultural and historical heritage. The majority of visitors are pilgrims that travel on the basis of religious motivation.

Finally, the *S. I. Gulyaev Belokurikha City Museum* is a private initiative, founded in 1997 with support of "Belokurikha Resorts" Ltd. Initial status of the museum was «Belokurikha Resorts» museum. Since 2005, the museum received municipal status. The museum is now both self- and state-funded, in recognitions of its importance as part of the local visitor economy of the resort. The museum has a staff of three persons, and the strategy of the museum is to keep and popularise the history of the resort town Belokurikha.

In terms of cultural attractions, the pattern in Altai is similar to that in other regions, namely that tourism plays a minor role for public museums, while it is of crucial importance to cultural institutions based on private or civil society initiative.

KNOWLEDGE INSTITUTIONS

Today, three state universities and a number of commercial schools train students for tourism industry in Barnaul. The university leader in tourism training is I. I. Polzunov Altai State Technical University, where the department of service and tourism was voted the best university by the experts of the contest "Leaders of tourism industry" in 2014. Staff at the department has considerable academic, international and practical experience, and in addition to training graduates for the tourism industry in Altai Krai, the department also hosts the Tourism Education and Resource Centre which develops and implements training programs for professionals in service and tourism.

7.3 Patterns of Cooperation

The review of collaborative patterns between tourism stakeholders in Altai Krai is undertaken in two steps. First interactions in five (?) key areas of destination development are reviewed, and then on the basis of this the overall patterns of collaboration are summarised.

DEVELOPMENT OF LOCAL TOURISM CLUSTERS

The region has identified cluster development as a priority in the program "Development of tourism in Altai Krai" in 2011 - 2016 years, an initiative initiated by Altai Krai Administration for the Development of Tourism, Recreation and Health Resort Industry. Clusters are seen as a concentration of interconnected organisations and enterprises that are active in tourism or related economic sectors on the one limited territory in order to increase the region's competitiveness on national and (eventually) international markets. According to the regional body, the basic steps for the development of clusters revolve around coordination of investments in facilities and infrastructure. On the one hand the regional Altai Krai Administration for Economy and Investments subsidises construction of engineering infrastructure of clusters, official registration of land for the construction of tourist facilities. And in parallel with this the Altai Krai Administration for the Development of Tourism,

Recreation and Health Resort Industry – together with local authorities, local government tourism departments and private investors – aims to ensure the foundation of tourism industry clusters.

Private tourist organisations – tour operators and tour agencies – are not acting as investors of Special economic zone for tourism and recreation in Altai Krai, because they do not have enough financial resources, except in their own minor projects (small hotels, cafés etc.). Instead large construction projects are invested by other investors: private investors provide hotels, food enterprises, entertainment enterprises, alpine skiing tracks and other services, while engineering infrastructure is funded by federal, regional or municipal government budgets. It is important to note that major initiatives like "Belokurikha - 2" and the "Golden Gate" City of Biysk which have been given federal status as tourist clusters are co-financed by federal and krai budgets as well as private investors, and these initiatives are therefore particularly well resourced.

SERVICE QUALITY IMPROVEMENT

Cooperation between authorities and business (lodging facilities) is aimed at increasing motivation and financial opportunities for peer evaluation of lodging types according to the adopted state hotel classification system. Partial funding of certification procedures is available from Altai Krai budget, and the association «Altai hospitality» is in charge of better quality lodging services. Founded in 2010 and currently having 10 members, the association's main aim is to improve the quality of hotel service, exchange the experience, training and development of staff skills.

In the future a similar approach might be adopted for certification of popular tourist products such as branded tourist routes – e.g. the "Small Golden Ring of Altai" and the "Great Golden Ring of Altai" – for safety and quality in accordance with applicable State standards. This kind of interaction of government, business and education objectively assesses the professional level of market participants and enhance the prestige of the service professions in a competitive environment.

DESTINATION BRANDING

In order to promote tourism development, it is important to create an image of Altai Krai as a year-round destination, and to promote tourist products of Altai Krai in the Russian and foreign markets. In order to raise the region's general profile and to promote specific tourist products, the bodies of regional tourism authorities and tourist organisations jointly participate in international and regional exhibitions and economic forums ("ITB", «In tour -market », "MITT", » Altai- Tour. Altai -Resort», "Tour- Sib»), while cultural institutions (museums, protected natural areas) take part in promoting historical and cultural potentials for prospective visitors.

The programs fund the development and design of a brand of Barnaul and Altai Krai and promote it for the period 2014-2018. Total funding of 745 thousand roubles and 2 million roubles respectively is available for the development and design of the brands. Contractors will be selected on a competitive basis. The basis for cooperation with regard to exhibitions is financial and informational is that public

authorities commonly pay for the exhibition area while private tourist companies pay all other expenses.

Private tourism business, educational, historical and cultural institutions, Altai Krai authorities and municipalities hold press tours, roundtables, conferences and seminars to discuss the issues how to develop the tourism industry. The most promising form of promoting tourist services of Altai Krai is the program “professional shopper” which offers familiarisation, image and work trips in Altai Krai to travel agencies from different regions.

But important steps have also been taken with regard to creating shared information platforms for promotional and coordination purpose. This area of cooperation is of great importance due to the dynamic progress of information technologies and their significance in promoting tourist products and services on the one hand and supporting travellers with updated information on the other hand. Activities are coordinated by *Altaitourcentre* (www.vizitaltai.info) and include providers of tourist services, products and information, private business, operators of historical, cultural and natural tourist destinations, as well as universities as developers of techniques and methods of information resources. An example of such cooperation is the innovative technology QR-coding of information about historical sites, which has already been used in Barnaul and Biysk.

INCREASING THE KNOWLEDGE-BASE

In recent years interaction has increased between regional knowledge institutions and both public and private tourism stakeholders. Knowledge exchange takes place along two lines in particular, namely on the one hand targeted knowledge production, and on the other hand training and competence development.

Local tourism authorities in Altai Krai and the universities hold marketing and sociological research to develop the tourism industry and to implement major investment projects in Siberian regions. Examples of this include

- work on arrival statistics in order to increase knowledge about existing visitors
- research in order to facilitate the development of two new tourist routes
- research in support of the development of rural and sustainable tourism
- new guidelines are introduced for the development of tourism and service in the municipalities of Altai Krai, developed by private tourism businesses and education institutions

In parallel with this universities have offered short-term and long-term training programs for staff employed in tourist organisations, accommodation/lodging facilities, catering, and service enterprises. Government authorities and administration officials who are responsible for tourism and cultural institutions with private business experts take part and contribute to study courses. Moreover, the Altai Krai authorities, private tourism, hotel and restaurant business, museums, national parks, wildlife preserves cooperate with the universities in training:

- to offer work sites for practical and work-related training of students
- to offer resources and expertise for practical training as part of the training course

- to define and assign understudy and research materials for course and diploma projects of students

SUPPORTING SOCIAL TOURISM

- To develop social tourism is one of the priorities of Altai Krai. However, the region is one of a number of those Russian regions which do not have special legislative acts or a special-purpose program to support long-term regional special-purpose social programs, not just ad-hoc excursion/touring for disadvantaged citizen. Nevertheless, today a number of projects are underway with the contribution of social support centres, universities, tourist firms and museums in Altai Krai. The examples of the projects are " tourism for seniors", tours of Barnaul and Biysk for children from low-income families and children with disabilities.

COLLABORATIVE PATTERNS IN ALTAI KRAI

The analysis of the interactions between public and private actors in tourism development in Altai Krai is summarised in Figure 7.

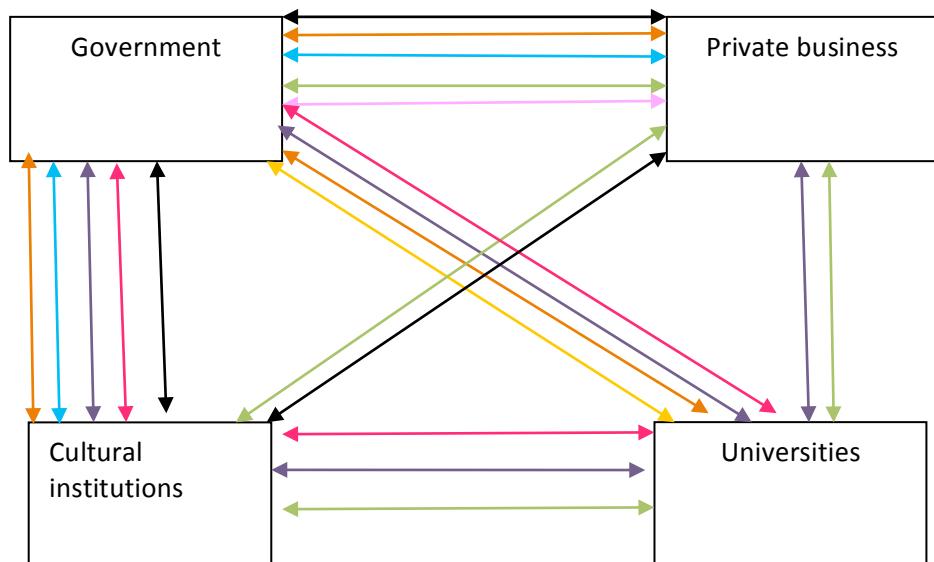


Figure 7. Patterns of cooperation between the actors of the tourist market in the region.

Legend for areas of collaboration

- tourism clusters
- service quality
- destination branding
- knowledge-base
- social tourism
- product development
- legislative and informational infrastructure

The figure demonstrates that, unsurprisingly, government is the most central actor, with numerous links to all other stakeholders. Conversely, both private business and cultural institutions are both primarily oriented towards government, as their regulator and sponsor respectively, except with regard to product development where cultural institutions seem to be a more relevant partner for private firms.

The universities have gradually increased collaboration with all other actors, especially with regard to knowledge, service quality and product development. Given the wide range of university links with both government, private business, and cultural institutions, public knowledge institutions may well come to play an important part in future collaborative ventures in the region, particularly because the tourism industry is relatively important in Altai Krai, and the need to take informed decisions and increase the fit between supply and market demand therefore is a matter of strategic importance. This is of course not without difficulties, especially because – like in many other tourist destinations in the Russian Federation and beyond – ways need to be found to reach the large number of small private firms providing services and attractions, and – potentially equally challenging – to influence government decisions on large-scale, often federal, tourism development projects that play an important role in the tourism industry in the region.

7.4 Conclusions

In many respects Altai Krai would seem to have a relatively favorable position with regard to tourism development. From the public sector federal funding for development of large investment projects in tourism sector is available in several designated zone, and regional government has given priority to the sector in its longer-term development programme. In terms of image within the Russian Federation, Altai Krai is recognised as a steadily growing region which ensures peace and security for visitors, and a variety of lodging types and services with the capacity to accommodate up to 500,000 motivates efforts to develop tourism cooperation towards limiting seasonality and improving the quality of services. Moreover, the availability of human resource that can be brought into use through the construction of new facilities, and, indeed, training centres and centres for retraining of staff into tourism and service. Finally, growing international collaboration between businesses in the region and international partners would seem to suggest, that Altai Krai may develop a more international visitor profile in the future, supported by digital marketing innovations used in tourism that stimulate cooperation between universities and other stakeholder groups.

There is a number of positive factors influencing on the cooperation between the stakeholders acting in tourism sphere of Altai krai:

- federal budget funding for the development of large investment projects in tourism sector (special economic zone for tourism and recreation, gambling zone, federal-status tourist clusters);

- state status to the long-term special-purpose program "Development of tourism in Altai Krai" in 2011 - 2016 years;
- positive image of Altai Krai in Russia as a steadily growing region that ensures peace and security for your stay;
- developed agriculture in most areas of Altai Krai as the resource which enables the cooperation towards the growth of rural tourism;
- a variety of lodging types with a variety of services that have capacity of accommodating up to 500,000 guests as a motivating factor to develop tourism cooperation towards minimizing its seasonality and improving the quality of services;
- a variety of resources for tourism development (including protected natural areas: 35 state nature reserves, 51 natural sites, 1 natural park and federal-status nature reserve "Tigireksky"); opportunities for cooperation in environmental projects and protection of natural resources;
- unemployed labor as the human resource for further cooperation towards creating new jobs through the construction of new facilities, training centers and centers for retraining workers in tourism and service;
- productive business activities in the region, a number of cooperation treaties and agreements in various sectors of economy, including tourism (China, Italy, France, Kazakhstan);
- science and technology along with technological innovations in information technology; and marketing innovations used in tourism that stimulate cooperation between universities and other stakeholder groups.

However, despite this promising starting point, some challenges are also noticeable:

- Tourism development statistics and accommodation/lodging data by regional authorities currently contradict the data collected by private tourism business due to different statistical methods. This contradiction calls for closer cooperation in the field of statistics and reporting between these actors, an area in which public knowledge institutions such as the *Tourism Resource Centre* could play a constructive role, so that discussions about tourism development can proceed on the basis of a basis agreed to by stakeholders across the region.
- The limited resources currently devoted by regional government to the "Altaitourcentre" makes this organisation a potential bottleneck, and transferring some types of work to other competent actors of the tourist market - universities, private business, cultural institutions - could improve the flow and quality of regional marketing and information services.
- Recent international cooperation agreements in tourism between the Altai Krai Administration and the regional government of the People's Republic of China create an urgent need to adapt lodging amenities and tourist products to the needs and mentality of Chinese tourists, also through training of employees. If the exchange of tourists becomes a strategic goal for the region, the authorities and private businesses will have to cooperate more actively in this area.
- Limited funding of federal, regional and municipal tourism development programs that results in violation of program implementation schedules and deters private actors from becoming involved.
- Ongoing reviews of tourism industry legislation may change the market structure of the stakeholders and adversely affect the current cooperation between leading private tourism businesses and other stakeholder groups.
- Paradoxically, the establishment of special economic zones where risk is particularly low because of thorough screening/support of investors/residents by the authorities, may adversely affect

long-term development implementation of new projects resulted as mutually beneficial relations based on collaboration between the main private actors of the tourist market, because private stakeholders wait for the state bring initiatives and resources to the table.

- The risk of abusing partnership interests in favour of individual commercial interests is critical for the business community, as well as partnership relations which favour personal interests within the public sector, as both will adversely affect trust and thereby the effectiveness of cooperation.

Finally, the global economy in general, and the Russian economy in particular, is characterised by great uncertainties of market, technological, political and other factors , which may be increased by rising tensions in intergovernmental relations, where sanctions result in visa policies making entry into and exit from the Russian Federation more difficult and thereby hamper tourism, especially in non-metropolitan regions like Altai Krai where 30% of the public budget consists of subsidies from federal government.

Uncertainties like these influence the interaction between the stakeholders interested in the dynamic development of the industry. On the one hand it makes collaboration and risk-sharing even more important, but at the same time it also makes individual stakeholders cautious and focusing on short-term goals, to the detriment of long-term investment in sustainable tourism development. The relative advantage of Altai Krai may, however, be that tourism is a relatively important part of the regional economy, that this for some years has been recognised by regional government, and that some private actors and public knowledge institutions engage in collaboration on an ongoing basis.

8 CONCLUSION

The four case studies of tourism development in non-metropolitan Russian regions have identified many commonalities but also important differences, reflecting specific conditions in the four regions with regard to tourism resources and governance structures. In line with the international literature on destination development and tourism clusters (e.g. Dredge 2006, Hjalager, 2000, 2010) we are *not* suggesting that one form of 'best practice' exist in the sense that e.g. particular organisational patterns must be adhered to in order to successfully support tourism destination development. If there is one argument running through the literature it is indeed the need to adapt organisational frameworks like destination management organisations or tourism clusters to the specific conditions in each destinations. Having said this, it is, of course, also clear that the absence of e.g. rich and sustained dialogue and interaction between public and private partners in many cases are likely to constitute a challenges for tourism development, because this typically implies either preponderance of short-term financial interests based on current market conditions, or preference for visible physical investments that can be claimed as successes in the next political election. In a developing market economy like the Russian Federation, partnership between public and private actors is therefore particularly important, and in this respect the experience of the four non-metropolitan regions are clearly parallel, yet also reflects the differences on four very different tourism destinations.

In *Tomsk region* the analysis of tourism development strategies and interactions between public and private stakeholders in the Tomsk region has produced three important findings. Firstly, the prevalent strategy for private sector development is a "bottom-up" strategy where each actor implements projects based on its own beliefs and interests. These projects are developed, and reports thereon are submitted to the authorities in order to receive support and financial sponsorship. The most promising projects are included in federal targeted programmes and supported by the local and regional administration through competitions, grants. Secondly, there is limited horizontal integration of the efforts of the local actors who are trying to integrate actions in the development of Tomsk as a tourist destination. Activities for incoming tourism are often not coordinated but rather the individual initiatives of private representatives of tourism industry or universities. Thirdly, the vertical integration and coordination of efforts the Administration of Tomsk Region and local administrations regarding in the development of incoming and domestic tourism is seen as limited and ineffective by private stakeholders. There is in other words no comprehensive, systematic approach to the problem, mechanism of the implementation of strategic documents, based on the interaction of actors of tourism in Tomsk region. Despite this there are, however, also notable examples of successful partnerships between public and private actors around particular development projects – attractions and events in particular – and thus the prospects of tourism development within the region would seem to rely predominantly on it being a spin-off from other socio-economic activities – e.g. cultural activities or innovation – rather than a primary goal of public policy.

Ivanovo region public-private partnership is practiced to a relatively large extent, and therefore both the potential advantages and disadvantages are particularly visible. On the one hand, it clearly enables public and private actors to collaborate in major projects as part of overarching tourism development strategies through co-investment in especially new infrastructure – and at the same time, it has also assisted in bringing about more intensive collaboration and knowledge exchange between universities, private firms, cultural institutions and, indeed, government bodies. However, at the same time there are circumstances that may undermine the effectiveness of this mechanism. Firstly, the inclusion of regional projects in the Federal target program requires the attraction of private investors to co-finance the projects whose interests may not fully coincide with the declared aims of the project. Secondly, in the contemporary Russian conditions the public-private partnership is still in its infancy, in the absence of a legally worked at the federal, regional and municipal levels «rules of the game», eliminating voluntarism and corrupt practices. Moreover, the current practice of private-public partnerships in fact excludes the participation of small investors and their associations, because small, but sometimes very important, projects are simply not considered.

In *Kemerovo region* the system of PPP in tourism is developing along a number of key directions. Most importantly, the establishment of Kemerovo Region Tourism and Recreation Cluster has led to the emergence of the mechanism for interaction, cooperation and partnership between the stakeholders, which brings hope of overcoming the problems and challenges that were previously encountered in the sphere of tourism in Kuzbass. However, at present the Cluster is being developed due to federal funding, while private actors, though actively involved in all the activities, have so far been quite reluctant to invest any funds. Thus, if the system of cooperation within the Cluster is not elaborated, or if the federal funding of the project is stopped, there might be no further extensive partnership between business community and educational and cultural institutions. Finally, both in Kemerovo Region and in Russia, despite the proclaimed course promoting the necessity of post-industrial economy formation, most attention is still paid to the traditional industrial spheres: coal mining, metallurgy etc. That is why tourism and investments in this sphere still depend directly on the situation in the energy and metallurgy markets.

In many respects *Altai Krai* would seem to have a relatively favorable position with regard to tourism development. From the public sector federal funding for development of large investment projects in tourism sector is available in several designated zone, and regional government has given priority to the sector in its longer-term development programme. Moreover, growing international collaboration between businesses in the region and international partners would seem to suggest, that Altai Krai may develop a more international visitor profile in the future, supported by digital marketing innovations used in tourism that stimulate cooperation between universities and other stakeholder groups. However, despite this promising starting point, some challenges are also noticeable. Firstly, limited funding of federal, regional and municipal tourism development programs undermines program implementation schedules and deters private actors from becoming involved. Secondly, ongoing reviews of tourism industry legislation may change the market structure of the stakeholders and adversely affect the current cooperation between leading private tourism businesses and other stakeholder groups. Thirdly, paradoxically the establishment of special economic zones where risk is particularly low because of thorough screening/support of investors/residents by the authorities, may adversely affect long-term development implementation of new projects resulted as mutually beneficial relations based on collaboration between the main private actors of the tourist market, because private stakeholders wait for the state bring initiatives and resources to the table. Fourthly,

the risk of abusing partnership interests in favour of individual commercial interests is critical for the business community, as well as partnership relations which favour personal interests within the public sector, as both will adversely affect trust and thereby the effectiveness of cooperation. And finally, the global economy in general, and the Russian economy in particular, is characterised by great uncertainties of market, technological, political and other factors, which may be increased by rising tensions in intergovernmental relations, where sanctions result in visa policies making entry into and exit from the Russian Federation more difficult and thereby hamper tourism. Uncertainties like these influence the interaction between the stakeholders interested in the dynamic development of the industry. On the one hand it makes collaboration and risk-sharing even more important, but at the same time it also makes individual stakeholders cautious and focusing on short-term goals, to the detriment of long-term investment in sustainable tourism development. The relative advantage of Altai Krai may, however, be that tourism is a relatively important part of the regional economy, that this for some years has been recognised by regional government, and that some private actors and public knowledge institutions engage in collaboration on an ongoing basis.

Despite these differences, it is, however, also abundantly clear that there are important similarities between the four regions and non-metropolitan tourist destinations.

It is immediately noticeable that *tourism development strategies* are generally seen as an important way of attempting to influence the development of the local visitor economy, and that these strategies tend to emphasise the importance of ongoing, even systematic, interaction between a wide range of public and private stakeholders. It is, however, also obvious that the regional level is engaged in a difficult balancing act when trying to mobilise existing cultural and/or resources by bringing together public and private funding in search of viable touristic development concepts. Given the relatively weak financial position of the regional level of governance in the Russian Federation, this means that external resources are of vital significance. The regions therefore come to rely heavily on becoming part of federal tourism development programs getting micro-destinations designated as special economic zones – or, alternatively, teaming up with large private investors who sees the visitor economy as a profitable investment opportunity.

Moreover, *public-private partnership* is generally perceived to be a useful way to bring together government and private firms as collaborators in development projects. It is, however, also clear that this particular mode of collaboration is primarily used – and possibly in its current legal form only relevant – in connection with major investment projects that involve physical infrastructures, e.g. buildings, resorts, or transport facilities. In practice this means that other aspects of product development in relation to tourist experiences – e.g. service concepts, experiences, branding – are effectively left to other stakeholders and hence not necessarily integrated in destination development in a convincing manner.

Paradoxically, this weakness of the current policy set-up may prove to be an advantage for *knowledge institutions* working with tourism development. Because when ‘soft’ policy instruments such as advisory services or inter-firm networks remain marginal in government tourism policy, these services can be provided by universities, e.g. through platforms like the Tourism Resource Centres which have been initiated as part of the TEMPUS-sponsored TOULL project. In this way universities can help to fill a policy gap currently left by government and at the same time help to make tourism development strategies more knowledge based. The example of the activities of Kemerovo Tourism

Resource Centre as the coordinator of Kemerovo Region Tourism and Recreation Cluster has proved the efficiency of this model.

In the current international climate of global economic uncertainty and political tensions, tourism may not seem to be the obvious strategy for regional development, because it involves extensive mobility of persons and goods across borders that increasingly are being policed by governments for reasons of national security. However, these impediments to international travel may actually, at least in a short-term perspective, turn out to be a blessing for non-metropolitan tourism regions in Russia, because extensive investments have already been made in developing tourism facilities and experiences that is overwhelmingly geared towards catering towards the domestic market.

The four case-study regions each have their ways of approaching regional tourism strategies and public private partnership. In many ways Tomsk stands out from the rest, with comparatively low level of visitation and, at best, fragmented public policies – but at the same time this region has developed a capacity to collaborate around specific events that are crucial to strengthening the local visitor economy. In the other three regions – Kemerovo, Ivanovo and Altai Krai – the governance set-ups are more systemic, and differences between the regions appear to reflect the different resources that can be mobilised for touristic purposes: health care and nature in Altai Krai, cultural heritage in Ivanovo, and outdoor resources in Kemerovo.

In all four regions – and, presumably, many other non-metropolitan regions in the Russian Federation – it remains a challenge to secure (continued) political support for tourism as a priority in regional development, in competition with traditional manufacturing and extractive industries. Here the experience from the regional studies would seem to suggest that knowledge institutions can play an important part in bringing stakeholders and knowledge together, and that this could help future projects to become more sustainable in the long run by helping to mobilise and coordinate the efforts of the wide range of actors involved in tourist destination development.

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9.3 Interviews

Tomsk

Andrey Bobilev, Deputy Director of the Museum of Slavic Mythology

Vladimir Ilyin, owner and founder of the fort in Semiluzhki

Julia Kaljuzhnaja, director of the tourist excursion company "Polaris"

Rabbi Levi Kaminezki, Jewish community of Tomsk

Alexey Knyazev, Deputy Governor of Tomsk Region on Scientific and Educational Complex

Professor Kolodii, N.A., Head of Siberian Resource Centre of the Tourism Industry, Head of the Department of Cultural Studies and Social Communication of TPU

Mullah Hazrat Nurulla, Muslim community of Tomsk

Irina Shpachenko, Deputy Head of Department for Higher Vocational Education of Tomsk Region Administration

Father Victor Sirotin, Tomsk eparchy of Russian Orthodox Church Eparchy

Dmitry Son, Deputy Vice Rector for Administrative and Social Work of Tomsk Polytechnic University, Programme Director of Forums Innovus and U-novus

Alexey Vasilyev, chairman of the Association of Military Sports Clubs

Associate professor Saveliy Wolfson, PhD in History, head of the International Relations Department of the Faculty of History of TSU

Ivanovo

Antonova Olga Genrikhovna, Deputy Head of the Education Department of the Ivanovo region.

Astafiev Evgeny Gennadyevich, Head of administration of the Gavrilov-Posad municipal district of the Ivanovo region.

Kagan Felix Iosifovich, head of the Interregional resource centre of training and retraining of personnel for tourism and hospitality, head of the Department of socio-cultural service and tourism of ISPU.

Kalinina Natalia Aleksandrovna, director of the tourist-transport association «Slavyanka», the leading touroperator in the Ivanovo region.

Kareva Galina Alevtinovna, director of the Museum of Ivanovo chintz.

Shevtsov Alexey Vladislavovich, the owner of the hotel «Sobornaya Sloboda», the president of the Plyos yacht club, one of the key investors of Plyos.

Travkin Pavel Nikolaevich, founder and director of the Archaeologist P.N. Travkin museum centre in Plyos.

Vlasov Vladimir Dmitrievich, general director of JSC «RIAT», one of the key investors in the Ivanovo region.

Zotov Nikolai Nikolaevich, head of the Department of sports and tourism of the Ivanovo region.

KEMEROVO

1) the officials working for Kemerovo Region Department of Youth Policy and Sports, Kemerovo City Board for Culture, Sports and Youth Policy, and members of Kemerovo Region Governor's Public Tourism Council (number of interviewees: 6).

2) members of the professional community – associates of Kuzbass Association of Tourism Industry Enterprises and Kuzbass Non-Profit Partnership of Tourism Industry (number of interviewees: 18).

3) professors and trainers teaching Tourism disciplines at Kemerovo State University, Kemerovo State University for Culture and Arts and T. F. Gorbachev Kuzbass State Technical University (number of interviewees: 9).

4) directors and associates of museums of Kemerovo City and Kemerovo Region (number of interviewees: 4).

ALTAI KRAI

O.S. Akimov, Deputy Director for Strategic Development and Legal Affairs, "Belokurikha Resorts" Ltd.

S.A. Barysheva, Director, Biysk Altai Spiritual Mission History Museum in Biysk

S. I. Gulyaev Belokurikha City Museum (Director Batuyeva Tamara)

V.V. Bianki Biysk Local History Museum (director Barysheva S.A.)

R.V. Emelyanova, Head of Sector, Marketing and Tourism Administration Sector of Biysk

E.V. Evsyukova, Deputy Chief, Altai Krai Administration for the Development of Tourism Recreation and Health Resort Industry

N.V. Gordeeva, President, Nonprofit Partnership "Altai Regional Tourism Association (ARAT)"

I.A. Kolupanova, Director, Tourism Resource Centre at Polzunov Altai State Technical University

T.I. Sazhaeva, Director, Altai Krai Independent Institution "Tourist centre of Altai Krai"
("Altaitourcentre ")

A.V. Shershneva, Manager, "Altai tourist" LLC

N.Y. Starikova, Director, Tourist firm «Belokurikha - Travel «

V.N. Fedorov, director, Altai Krai Centre for Youth Tourism

10 ENDNOTES

¹ The data for analysis were taken from: Osnovnye pokazateli ravitiya turizma v Kemerovskoy oblasti (Key figures of tourism development in Kemerovo region // website of Kemerovo Region Department of Youth Policy and Sports // access address: <http://www.dmps-kuzbass.ru/tourism/development/> - accessed on 18.05.2014; Sotsialnaya sfera (Social sphere) // "Kuzbass" statistical yearbook 2009 // access address: [http://www.kemerovostat.ru/bgd/EJEGOD/issWWW.exe/Stg/2009/\(7\)%20социальная%20сфера.htm](http://www.kemerovostat.ru/bgd/EJEGOD/issWWW.exe/Stg/2009/(7)%20социальная%20сфера.htm) - accessed on 18.05.2014; Kul'tura, otdykh, turizm (Culture, recreation and tourism) // "Kuzbass" statistical yearbook 2012. - access address: http://www.kemerovostat.ru/bgd/EJEGOD/issWWW.exe/Stg/2012/9e_культура.htm - accessed on 18.05.2014; Kuzbass. Istoriya v tsifrakh (Kuzbass. History in numbers): statistical abstract. - Kemerovo: Kemerovostat, 2008. - P. 139-141, 253; Kuzbass. 2013: statistical abstract. - Kemerovo: Kemerovostat, 2013. - P. 130-136, 224; Turistskaya deyatel'nost' I otdykh v Kuzbasse (Tourism and recreation in Kuzbass): Statistical abstract. - Kemerovo: Kemerovostat, 2005. - P. 9, 15, 37; Turistskaya deyatel'nost' I otdykh v Kuzbasse (Tourism and recreation in Kuzbass): Statistical abstract. - Kemerovo: Kemerovostat, 2009. - P. 9, 14, 61.

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