

## INFLUENCE OF INSTITUTIONAL FACTORS ON CIRCULAR ECONOMY PRACTICES IN EMERGING TOURIST DESTINATIONS

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**Abstract:** This study examines how key institutions such as policies, incentives and stakeholder collaboration influence the implementation of circular economy initiatives in emerging tourism destinations. Main approach for this study is a case study method with documentary analysis and interviews with key stakeholders using Kazakhstan case. The documentary analysis showed the shortcomings of regulatory framework and adherence to a “planned circularity”. The analysis leads to practical recommendations for policymakers, including the development of comprehensive circular economy guidelines addressing tourism, financial incentives for businesses, infrastructure investment and increased collaboration among stakeholders. This study contributes to the literature by providing a detailed examination of how institutional factors shape circular economy practices in tourism in emerging destinations context. It offers insight into how global circular economy principles can be adapted to local conditions, thereby expanding understanding of the circular economy in different geographic and economic contexts.

**Keywords:** circular economy, circular tourism, sustainable tourism, institutions, emerging destination, case-study

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### INTRODUCTION

Tourism plays a vital role in many economies, creating jobs, boosting GDP and even revitalizing rural and less developed areas. However, tourism also has a huge impact on the environment, reliance on a linear “take-make-waste” model puts enormous pressure on local resources and generates significant negative externalities.

Sustainable tourism seeks to minimize the negative impacts of tourism activities while maximizing positive benefits for both the environment and local communities, advocating responsible travel practices, resource conservation, cultural preservation and active participation of local communities. The transition to sustainable tourism is not just an ethical imperative, but also an important factor in ensuring the long-term viability of the industry itself.

Circular economy challenges the traditional linear model and promotes a closed-loop system in which resources are used as long as possible and waste is minimized through recovery, reuse, recycling of resources.

Although the concept of circular economy is becoming more and more widely used, its application in tourism is still under-researched and fragmented (Rodriguez et al., 2020). In the context of a circular economy in the tourism sector, institutional factors play a critical role in shaping the adoption and implementation of circular economy practices (Jones and Wynn, 2022). These institutions include policies, rules, regulations and other formal and informal structures that influence the behavior of businesses, governing bodies and consumers.

Kazakhstan's tourism industry is experiencing significant growth, making it a suitable example for other emerging destinations. In 2022, according to the World Travel and Tourism Council, the share of tourism in Kazakhstan's GDP is at 7.6% and in monetary value at \$7.7 billion ((WTTC) World Travel and Tourism Council, 2023)[1], meanwhile, the country's government has ambitious plans to increase the contribution industry in GDP up to 15% within five years (Astana Invest City Investment Development Center, 2024). Kazakhstan has initiated programs and policies aimed at promoting sustainable development, making it a valuable case study for analyzing the effectiveness of such initiatives. The transition to circular economy in tourism will help harness the potential of tourism not only to protect natural and cultural heritage, but also to promote economic prosperity and social well-being of local people (Nocca et al., 2023). In addition, there is less research on circular economy in tourism in developing countries than in traditional destinations, and the Kazakhstan case helps fill this knowledge gap.

Existing literature highlights the potential of circular economy for environmental and economic benefits in tourism (Jones and Wynn, 2022; Pongsakornrungrasit and Pongsakornrungrasit, 2021; Rodriguez et al., 2020; Santos et al., 2023), but limited evidence exists regarding factors influencing its implementation. This study aims to investigate the influence of institutional factors, including policies, incentives, and stakeholder collaboration, on the implementation of circular economy initiatives within the tourism sector of emerging destinations. Specifically, it seeks to understand drivers and barriers shaping the adoption of circular economy practices in tourism businesses and contribute to the overall sustainability of the industry. By examining the case of Kazakhstan, the study aims to provide insights into the challenges and opportunities for transitioning to a circular economy in tourism and offer practical recommendations for policymakers and industry stakeholders.

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## LITERATURE REVIEW

### Institutional theory and Circular Economy

Institutional theory provides a framework for understanding the drivers and barriers of the circular economy by analyzing the institutional environments in which circular economy initiatives are implemented. The theory recognizes that institutions, such as laws, regulations, norms, and cultural-cognitive beliefs, shape the behavior of individuals and organizations, and influence the adoption and diffusion of new practices and technologies. In the context of the circular economy, institutional theory helps to identify the institutional drivers and barriers that influence the implementation of circular economy initiatives (Ranta et al., 2018). For example, regulatory policies have primary impact on recycling efforts on both the consumer and manufacturer sides, while some attempt toward recycling, and increasing reuse faces cultural-cognitive barriers. By analyzing the institutional environments of China, the US, and Europe, Ranta et al., (2018) identified the institutional factors that support or hinder the adoption of the circular economy, highlighting the importance of a holistic institutional approach for advancing the circular economy. Before transition to circular economy governments need to carefully design and strengthen their regulation to handle challenges like uncertainty, and public pushback with special attention to the design of the institutional arrangements (Riazi et al., 2023). Alonso-Almeida and Rodríguez-Antón (2020) further underscored the role of institutional pressure, including coercive and mimetic pressures, in driving the adoption of circular economy practices at both the macro and regional levels.

Technologies recognized as an important enabler of movement to circularity, for example information and communication technologies can support traceability for reusable packaging at a large scale (Ellsworth-Krebs et al., 2022), big data analytics and knowledge management enhance competitive advantage and performance through sustainability marketing (Hornig et al., 2022).

According to the theory developed by Bauwens et al. (2020), there is four possible different scenarios of the future of circular economy, which depend on the type of governance structure: centralized or decentralized; also on type of used technologies: high-tech innovations or low-tech innovations. The study explores four potential paths for the future of circular economy: a) "planned circularity" relies on centralized management and regulation and low-tech innovations to drive the transition; b) "bottom-up sufficiency" emphasizes local, individual actions focused on reducing consumption and waste but relies on low-tech innovations; c) "circular modernism" leverages advancements in technology and centralized management to maximize resource use and extend product lifespans, and d) "peer-to-peer circularity" prioritizes decentralized networks and community-based exchanges of goods and services by using tech innovations (Bauwens et al., 2020).

In the transition to a circular economy, institutions also play a crucial role in enabling and accelerating this shift. The study of Dagilienė et al., (2021) tackled obstacles to a circular economy, including weak waste management, staffing imbalances, poor networking, and underdeveloped local businesses. To overcome these, the study proposed a framework inspired by global and local success stories, focusing on learning, shared vision, responsive governance, smart regulations, and collaborative networks (Dagilienė et al., 2021).

Henrysson and Nuur (2021) emphasized the importance of institutions in regional path development, particularly in the natural resource-based sector, with physical flows, market networks, and cooperation patterns being key determinants. By recognizing importance of networking and cooperation for transition to circular economy Ho et al. (2022) dug into the complex relationship between businesses and civil society groups and uncover how these two players interact, both working together and pushing against each other, to navigate this shift towards a more sustainable system.

Stakeholders cooperation and social networks were recognized as vital enablers of transition to circular economy and in that context, universities play a crucial role in this transition by adopting sustainable environmental policies, providing life-centered and environment-centered educational services, and cultivating environmental awareness and behavioral changes. (Erdoğan, 2022). The concept of circular economy is perceived differently in the academic sphere, industry and government, but there is a substantial consensus space focusing on materials and products, creating new resources and businesses from waste. The Triple Helix model which requires collaboration and shared goals among business, government and academia, suggests to combine their competences for more sustainable economic and social development (Anttonen et al., 2018).

Among policy and regulation of circular economy except the production policy and wasty management, vitality of consumption policy were highlighted by several studies (Arranz et al., 2023; Arranz and Arroyabe, 2023; Camilleri, 2021; Pinyol Alberich et al., 2023). Furthermore, a growing wave of individuals, initiatives, and hybrid organizations actively challenging the dominant profit-driven model of consumption, these changemakers are paving the way for a consumption revolution, prioritizing experiences and connections over the endless acquisition of material goods e.g. peer-to-peer sharing, community initiatives, sharing economy and cooperative economy (Schulz et al., 2019).

Similar to the aim of our study, Ho et al., (2023) tried to identify main enablers and barriers of circular economy in the case of Australian state, and by interviewing main stakeholders found significant role of regulatory framework and collaboration whereas lack of guidelines and financial challenges are barriers of transition to circularity. More recent study of Feldman et al. (2024) by reviewing barriers of circular economy in Australia again highlighted regulation policy and financial obstacles. These studies were conducted in developed economy and were not industry specific. And analysis of factors affecting implementation of circular practices in emerging economy also highlighted importance of government policy among others (Khan et al., 2022).

Overall, the studies collectively highlight the significant influence of institutions, including policies and regulation, technologies, collaboration among stakeholders, consumption patterns in shaping the transition to a circular economy. Furthermore, most of studies related to institutional changes in the transition to circular economy carried out in developed countries, while developing and emerging countries have more specific institutions which should be investigated to

promote circular economy models. Another research gap relates to industry specific studies, manufacturing industries mostly under the consideration of researchers, studies related to circular economy in tourism sector is reviewed below.

### Circular Economy and Tourism

The transition to a circular economy in the tourism sector requires a multi-faceted approach, with a key role for innovation in business models (Florido et al., 2019). The circular economy and natural capital offer environmental and business benefits, but there is limited evidence of their integration into sustainability programs in the tourism and hospitality industry (Jones and Wynn, 2022; Manniche et al., 2021). Human Circular Tourism is proposed as a strategy to achieve a more sustainable and circular tourism, with a focus on increasing awareness among travelers (Nocca et al., 2023). Special role in the movement to circularity in tourism played by tourists itself (Sørensen et al., 2020), indeed, consumers awareness and attitudes are key as in driving so in hindering transition to circular economy (Julião et al., 2019; Kirchherr et al., 2018; Nassanbekova and Yeshenkulova, 2022). Consumer acceptance of circular products and services is crucial and one of the most powerful tools to foster this acceptance is effective communication of sustainability messages (Julião et al., 2019).

The eco-hotel industry is increasingly adopting green practices and circular economy principles, driven by consumer demand and the potential for cost savings (Santos and Marques, 2023). These practices include energy and water conservation, waste management, and the use of renewable energy resources (Julião et al., 2019). Li et al., (2024) in their critical review discussed circularity cases in tourism through water-energy-waste-food-transport prism and highlighted concentration of previous studies on energy efficiency and less on food and waste issues. Hotels that adopt sustainable practices are more likely to succeed if they have government backing, industry-wide standards, competition that prioritizes environmental concerns, and strong support from employees, the local community, and investors (Ouyang et al., 2019). The implementation of circular practices is associated with benefits such as reduced operating costs, increased guest satisfaction, and positive environmental and social impacts (Julião et al., 2019).

This transition can lead to new business models and practices, but there is a need for further research and case studies to fully understand its implications (Manniche et al., 2021). However, the adoption of circular economy practices in tourism is still in its early stages, with a focus on cost-saving measures (Santos et al., 2023). Among few empirical studies relating to circular economy in tourism, by conducting longitude research (Pongsakornrungrungsilp and Pongsakornrungrungsilp, 2021) drown main conclusion about vital role of value networks among stakeholders in driving circularity in practice. Further research is required at the macro level, involving various groups and stakeholders, most studies confirm that a successful transition to a circular economy in tourism requires the involvement of residents in the process and ensuring the cooperation of government officials with the community (Renfors, 2023).

Among main barriers for implementing circular practices in tourism are lack of regulatory enforcement and government support while main drivers refers to education and awareness (Bittner et al., 2024).

The transition to a circular economy in tourism is gaining traction but faces significant challenges. While the industry recognizes the potential environmental and economic benefits, implementation remains in its early stages, primarily focused on cost-saving measures. Consumer awareness and behavior are crucial for driving circular practices, but effective communication strategies are needed to foster acceptance. Collaboration among stakeholders, including government, businesses, and tourists, is essential for successful implementation. Overcoming barriers such as lack of regulations and support requires concerted efforts and further research to understand the full implications of circular economy in tourism.

### METHODOLOGY

The research design for this study was based on qualitative case-study in Kazakhstan. This study had two main parts: (1) analysis of regulatory frame for transition to circular economy in Kazakhstan, and (2) interviews with experts from industry, government, and academia. The flowchart of the study is given in Figure 1.

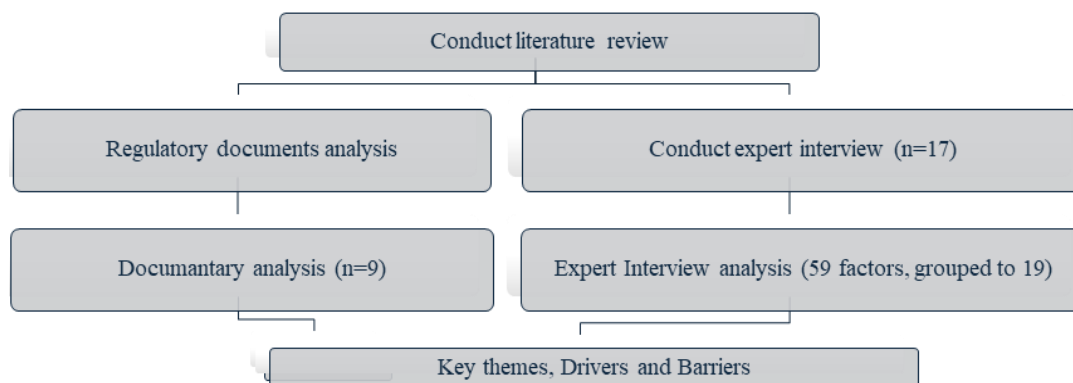


Figure 1. Flowchart of the study

After conducting literature review, governmental strategic and regulatory documents outlined in the Table 1 were revised. Total 3 strategic and 6 regulatory documents from Legal information system of Regulatory Legal Acts of the Republic of Kazakhstan adilet.zan.kz (Ministry of Justice of Republic of Kazakhstan, n.d.) by using keywords “circular economy”, “sustainability”, “green economy”, and “tourism” identified. Then reports and document of Kazakhstan’s

governmental and other official organizations relating to waste management, ecological situation, production and consumption were analyzed. After initially breaking down the policies into smaller, concrete themes (first-order codes), grouped them into broader, more theoretical categories (abstract categories).

This iterative process of analyzing and revising helped refine understanding of the policies' content and led to the identification of three key themes: energy efficiency, water resources, and waste management. Additionally, Bauwens et al., (2020) framework to evaluate future for circularity in Kazakhstan applied.

Table 1. List of analyzed policy documents (Source: Compiled by author)

1. National Development Plan of the Republic of Kazakhstan until 2025 (Decree of the President of the Republic of Kazakhstan No. 636 dated February 15, 2018). (2018/636)
2. Concept for the transition of the Republic of Kazakhstan to a “green economy” (Decree of the President of the Republic of Kazakhstan No. 577 dated May 30, 2013) (2013/577).
3. Strategies for achieving carbon neutrality of the Republic of Kazakhstan until 2060. Decree of the President of the Republic of Kazakhstan dated February 2, 2023. No. 121) (2023/121)
4. Environmental Code of the Republic of Kazakhstan. Code of the Republic of Kazakhstan dated January 2, 2021. No. 400-VI ZRK (as amended from 01/02/2023 No. 184, from 04/19/2023 No. 223, from 07/05/2023 No. 17) (2021/400-4)
5. The Law of the Republic of Kazakhstan On Support of the Use of Renewable Energy Sources dated July 4, 2009 No. 165-IV. (2009/165)
6. Decree of the Government of the Republic of Kazakhstan dated February 26, 2021, No. 99 “On amending the Decree of the Government of the Republic of Kazakhstan dated November 29, 2017, No. 790 “On approval of the State Planning System in the Republic of Kazakhstan.” (2021/99)
7. Law of the Republic of Kazakhstan “On ratification of the Protocol on Pollutant Release and Transfer Registers to the Convention on Access to Information, Public Participation in Decision-Making and Access to Justice in Environmental Matters” dated December 12, 2019, No. 279-VI ZRK. (2019/279-4)
8. Order of the Minister of Ecology and Natural Resources of the Republic of Kazakhstan dated July 11, 2022 No. 525 “On approval of the national carbon quota plan.” (2022/5250)
9. Order of acting Minister of Ecology, Geology and Natural Resources of the Republic of Kazakhstan dated July 19, 2021, No. 261 “On approval of the Rules for the development and approval of accumulation limits and waste disposal limits, submission and control of reporting on waste management” (2021/261)

Also, through semi-structured interviews, the study explored factors promoting and hindering transition to circular economy model. Purposive sampling was used to select among key players in tourism industry shift to circular economy in Kazakhstan. To choose the experts from the industry in senior manager or director position representatives with experience in sustainable tourism practices were invited to the interviews. From academia professors or senior researchers specializing in sustainable tourism, circular economy and sustainable development were selected. The main criteria for selecting policymaker experts were representatives from national and regional government level or Destination Management Organization (DMO), with specific involvement to tourism or environment policies. Professional networks and industry associations were used to find and reach potential interviewees. The interview protocol was developed based on the literature review and the documentary analysis. The author interviewed 17 experts and practitioners from tourism, representing accommodation sector, including general managers of big hotel chain operating in Kazakhstan and business owners representing small and medium enterprises; academicians who research area related to sustainable development of tourism or circular economy, and policymakers among them the head of one of Destination Management Organization and environmental and tourism areas policymakers (Table 2). The interviews took place between August – November 2023 on hybrid form, some interviews online through Zoom platform and other were face-to-face interviews.

Table 2. Profile of interviewees (Source: Compiled by author)

	Background	Number of persons	Duration of each interview
1	Industry	6	55-90 minutes
2	Academia	7	
3	Government	4	

Through open-ended interviews, the research explored institutional drivers and barriers existing in tourism in its transition to circular economy, and what factors enabling or hindering that shift. The questions for the interviews were designed based on literature review and group related to key institutions: policy and regulation, financial incentives and social cooperation. The interviews were continued while new factors were not identified. The records of the interviews were transcribed for future data analysis. For data analysis thematic analysis were used. Drivers and barriers relating to local institutions were first analyzed from the interview transcripts. A total of 59 factors were identified and coded, then the identified factors were clustered for more broad themes and clustered them to 19 groups (16 main and 3 additional).

## RESULTS

Kazakhstan, like other UN member countries, reaffirmed its commitment to the Sustainable Development Goals in 2015. The principles of sustainability and inclusiveness form the basis of the new National Development Plan of the Republic of Kazakhstan until 2025 (2018/636) (National Development Plan of the Republic of Kazakhstan until 2025, 2018). A new state planning system has been in effect since 2021 (2021/99), the essence of the updated system is that

documents of the State Planning System must contain UN Sustainable Development Goals indicators. For these purposes, national Sustainable Development Goals indicators were also approved in 2021 (Institute of Economic Research & Ministry of National Economy of the Republic of Kazakhstan, 2022).

However, Kazakhstan still does not have any special strategy or other regulatory document for transition to Circular economy. Among strategic documents “Concept for the transition of the Republic of Kazakhstan to a “green economy” adopted in 2013” (2013/577) (Concept for the Transition of the Republic of Kazakhstan to a “Green Economy,” 2013) and “Strategies for achieving carbon neutrality of the Republic of Kazakhstan until 2060” (2023/121) (Strategy to Achieve Carbon Neutrality of the Republic of Kazakhstan until 2060, 2023) contain some elements supporting movement to the Circular Economy Model. And main regulation of waste management in the country is covered by the Environmental Code of the Republic of Kazakhstan (2021/400-4) (Environmental Code of the Republic of Kazakhstan, 2021). Concept for the transition of the Republic of Kazakhstan to a “green” economy has three stages of transition: 2013–2020, 2020–2030, 2030–2050. The second phase for 2020–2030 is currently being implemented and provides for measures to transform the national economy, focused on the careful use of water, encouraging and stimulating development and broad implementation of renewable energy technologies.

Strategies for achieving carbon neutrality provides for a set of key measures to reduce emissions and decarbonize the economy, such as abandoning new coal generation projects and phasing out coal combustion (2021-2025), doubling the share of renewable energy sources in electricity production (2030), 100% sorting municipal solid waste (2040), sustainable agriculture on 75% arable land (2045), 100% electrification of personal passenger transport (2045), use of “green” hydrogen and complete elimination of coal production starting from 2050.

The regulation frames relating to resource utilization are mostly related to the energy sector and water resources. In accordance with the Law of the Republic of Kazakhstan “On Supporting the Use of Renewable Energy Sources” (2009/165), clean energy producers have the opportunity to sell generated electricity from renewable energy sources in the public network, at special tariffs through the Settlement and Financial Center for Support of Renewable Energy Sources (Government of the Republic of Kazakhstan, 2024). This, in turn, guarantees the purchase of electrical energy from renewable energy sources. Producers of renewable energy sources are exempt from paying for the services of energy transmission organizations for the transmission of electrical energy; priority has been determined for renewable energy sources when transmitting electricity through networks. These government support measures in the form of guaranteed purchase of electricity should help stimulate the development of renewable energy sources. To receive the above support measures, the implementation of renewable energy projects is carried out through an auction mechanism (Government of the Republic of Kazakhstan, 2024).

However, according to experts from the energy sector in Kazakhstan, this incentive as a guaranteed purchase of electricity is not an effective measure in practice and previous measures as a tax incentives for companies using renewable source of energy were more effective (Nassanbekova et al., 2023).

The country maintains cadastral records of all water bodies, including in terms of clarifying and observing the regime for the use of land in water protection zones and strips and bringing them into compliance with water and land legislation by reducing the anthropogenic load on water bodies and applying water conservation at all levels of water use, especially in agriculture. In order to manage the supply and demand for water in the Republic, water use limits have been established (28.4 km<sup>3</sup> annually until 2025) and provisions have been introduced to regulate water use in the context of individual water users (Ministry of Ecology and Natural Resources of the Republic of Kazakhstan, 2023). At the same time, the environmental component of water resources (stability of ecosystems, development of fish farming, ecotourism and preservation of unique natural resources) should not be infringed in favor of industrial development (Concept for the Transition of the Republic of Kazakhstan to a “Green Economy,” 2013).

Regulation in waste management area in Kazakhstan mostly consist of restrictions and quotas for waste generation and emissions. These measures could be found in Order of the Minister of Ecology and Natural Resources “On approval of the national carbon quota plan.” (2022/5250) and Order of acting Minister of Ecology, Geology and Natural Resources “On approval of the Rules for the development and approval of accumulation limits and waste disposal limits, submission and control of reporting on waste management” (2021/261). Based on a valid environmental permit or environmental impact statement, operators make payments for negative environmental impact quarterly, no later than the 25th day of the second month following the reporting quarter. Payment for environmental impact assessment is one of the types of arrangements for economic regulation of environmental protection – art. 126 of the Environmental Code of the Republic of Kazakhstan dated (2021/400-4). At the same time, according to official reports, in 2021: the share of processing and disposal of solid household waste in their generation is only 21.1%, the provision of the population with waste collection and removal services is 82.0%, the share of landfills that meet environmental requirements and sanitary standards – 20.0% (Ministry of Ecology and Natural Resources of the Republic of Kazakhstan, 2023).

To promote green technologies and support business to increase the competitiveness of the economy and reduce the negative impact on the environment, the International Center for Green Technologies and Investment Projects was created. The transition of enterprises to comprehensive environmental permits is envisaged, subject to the implementation of the best available technologies (Institute of Economic Research & Ministry of National Economy of the Republic of Kazakhstan, 2022). This initiative particularly is example of encouraging utilization of high-tech innovations in transition to more sustainable economy. Regarding the effectiveness of local and regional institutional mechanisms, the work in this area is only at the initial stage (Institute of Economic Research & Ministry of National Economy of the Republic of

Kazakhstan, 2022). Furthermore, the country remains unresolved the issue of consolidating sustainable projects of entrepreneurs and the civil sector, which together can open up opportunities for Kazakhstan to attract domestic and international partners, best practices and additional financing (Institute of Economic Research & Ministry of National Economy of the Republic of Kazakhstan, 2022). While Kazakhstan has not particular strategy for transition to circular economy, the regulation in this field is fragmented and not consistent. The analysis above shows that regulations relating to energy and water resources consumption and waste management is heavily involving restrictions, limits and bans.

Application of the energy, water and waste regulatory in Kazakhstan to tourism industry limited because for example, restriction and bans for waste generation mostly oriented to mining and manufacturing industry, while tourism companies do not generate waste in the volume pointed in the above documents. The incentive for using renewable energy also more applicable for companies specialized on producing renewable energy in considerable volume.

The results show that while national policies generally support sustainable practices with a strong environmental focus, specific tourism-related initiatives and industry standards in general are lacking. For example, according to the interviews with practitioners from industry, some eco-hotels are implementing measures to reduce waste and use renewable energy sources, but regulatory and financial barriers prevent wider adoption.

Table 3 summarizes institutional drivers and barriers in transition to circular economy in tourism in Kazakhstan. They divided to the groups: policy and regulation, financial incentives and social cooperation.

Table 3. Institutional drivers and barriers in the transition to circular economy in Tourism in Kazakhstan (Source: Compiled by author)

	<b>Policy and regulation</b>	<b>Financial incentives</b>	<b>Social cooperation</b>
Drivers	- Consistency with national strategic goals (PRD1) - Supporting regulatory frameworks (PRD2) - Public pressure (PRD3)	- Grants and subsidies (FID1) - Tax breaks and green labeling schemes (FID2)	- Community engagement (SCD1) - Supporting influencer marketing (SCD2) - Education and awareness campaigns (SCD3)
Barriers	- Inconsistent policies (PRB1) - Weak enforcement (PRB2) - Bureaucracy and complex permitting processes (PRB3)	- Limited funding. (FIB1) - Lack of awareness (FIB2) - Unclear return on investment (FIB3)	- Limited access to information (SCB1) - Negative perceptions (SCB2)

### **Policy and regulations' drivers and barriers**

In analysis three main drivers and three barriers were found: PRD 1 – Consistency with national goals (the Concept of Kazakhstan's transition to a green economy and commitment to international environmental agreements), PRD2 – supporting regulatory framework (support for the transition to renewable energy sources and the adoption of energy efficiency, water and waste management standards) and PRD3 – public pressure (growing pro-environmental movements).

PRD1 were mentioned by most part of interviewees, including interviewees from governmental sector and academia. Participants outlined Kazakhstan's commitment to UN Sustainable Development Goals. In the opinion of interviewees "Kazakhstan is country with strong vertical integration across level of government and any initiatives top down works better than bottom-up" and accordingly setting transition to circular economy in national level strategies is key driver.

Second policy and regulation driver tightly related with previous, setting national strategies relating to transition to circular economy is bases for development regulatory documents and industry standards. The interviewees agreed that setting stricter energy efficiency standards, water usage permits, and waste management practices could positively affect transition to circular economy in tourism. However, business owners expressed opinion too strict regulation without economic benefits would lead to increase of additional expenses for business. At the same time interviewees from industry "is not considering changes in current business models, if there is not pressure from regulatory authorities".

Public pressure PRD3 considered as key driver in transition to circular economy and were highlighted by nine interviewees. Interview participants explained that demand is key factor for any product offer, and it is true also for transition to circular economy, tourists as a customer can require from service providers eco-friendly products. Growing awareness of environmental issues driving demand for eco-friendly options, furthermore, influencing policy change. Participant from academia convinced that public is most influential tool in transition to more sustainable business practices, not only customers but investors, shareholders, local communities can make pressure and initiate changes.

By analyzing the interviews, policy and regulatory barriers divided to three main groups: PRB1 - inconsistent policies (lack of coordination between different levels of government, lack of a holistic approach), PRB2 - weak enforcement (effectiveness in practice may be low due to non-compliance and generating unfair competition), PRB3 – bureaucracy and complex permitting processes (lengthy procedures for obtaining permits and licenses hinder many initiatives).

Interview participants admitted contradictions in regulatory policy of Kazakhstan, and lack of coordination between government regulatory agencies (PRB1). "While some agencies persuading business to waste recycle, most of recycle companies closing due to strict regulation and lack of support". Furthermore, there's a growing concern that existing regulations are failing to achieve their intended purpose due to insufficient enforcement, leading to increased non-compliance and unfair competition (PRB2). As the causes for weak enforcement "lack of qualified personnel in governmental agencies and outdated technology" were highlighted. PRB3 recognized as a key factor inhibiting the process of transition to circular economy. Participants provided different examples for PRB3, among them: "the government stated that there is opportunity to sell generated electricity from renewable energy sources in the public network, however in practice, concluding contracts is difficult, and the purchase of electricity from small producers is not carried out willingly", ".. for eco-tourism initiatives in quite bureaucratic and time-consuming".

### **Financial Incentives' drivers and barriers**

Financial incentives are among the most effective institutions for changes. The analysis identified two main drivers: FID1 – grants and subsidies (government subsidies for energy-efficient equipment, water-saving technologies and waste management infrastructure) and FID2. – tax incentives and green labeling schemes. FID1 can reduce investment costs, encourage adoption and stimulate research in the circular economy area, while FID2 providing financial benefits for eco-friendly businesses can make them more competitive and attract tourists. However, as industry representatives noted, “this is not yet practised in our country, or we do not know about them”.

Participants additionally pointed need for green labelling schemes or industry eco-standards with green certification is key driver of circular economy in tourism, the hotel chains operating at the international level have green certifications, in contrast, the local hoteliers cannot see the benefits of practising circularity.

Among the barriers to financial incentives in this study, identified: FIB1 – limited funding, FIB2 – lack of awareness (businesses may not know about existing financial incentives or how to access them) and FIB3 – unclear return on investment (long-term benefits from sustainable development, measures may not be immediately obvious, which deters businesses from participating). The most of participants recognize financial incentives for the transition to the circular economy in Kazakhstan are insufficient and FIB1 is one of the main drawbacks. “Tax breaks practised before are not active anymore, unfortunately”. The participants from the industry outlined FIB2 and FIB3. Some participants from academia gave examples of information campaigns and research projects relating to increasing awareness and educating SMEs about sustainable and circular practices, but agreed about limited coverage and needs for future works in these areas.

### **Social cooperation's drivers and barriers**

Findings suggest that collaboration and partnerships can drive the transition through: SCD1 – community engagement, SCD2 – influencer marketing and SCD3 – education and awareness campaigns.

The interviewees stated importance of SCD1, because local communities can advocate for sustainable tourism practices, protect natural resources, and influence visitor behavior. One of participants attributes the success of government programs to community engagement. Another interviewee believes that “then higher is engagement of local communities to circular economy practices then faster and easier the implementation and effect”. “There needs cooperation not only between government and industry or government and local community but between industry and local community, between companies and within the communities”. By them own experience, the participant know that “mostly pro-environmental behavior and practices succeeded in communities where leaders are encouraging those initiatives”.

Above statement is true also for next social cooperations' driver SCD2. More than half of the participants mentioned the role of social media influencers who promote responsible tourism and can raise awareness and encourage eco-conscious travel choices. The participants noted the popularity and powerfulness of influencer marketing in Kazakhstan, “It is influencers on social networks that cause resonance on environmental problems and incidents in our country, and they dictate trends towards sustainable practices and often take the initiative to promote”.

Importance of SCD3 were explained that educating tourists and businesses about the importance of environmental protection can promote responsible behavior and demand for sustainable options. By opinion of participants “transition to circular economy in tourism possible only if there are demand and support for it from society, tourists.” SCD3 recognized by this study as key institutional factor highlighted by 15 out of 17 interview participants.

Social cooperation is very important for the transition to circular economy in tourism, but there are some barriers to circular economy in tourism: SCB1 - limited access to information and SCB2 - negative public perception of circular economy initiatives. SCB1 is interrelated with SCD3 and the interviewees expressed opinion that rural communities might not have access to information about circular tourism practices and “in our country quazi-governmental companies and big corporations have privileged position, have better access to information and resources”. However, “thanks to digital technologies and social media access to information is beaming better”. SCB2 explained by misconceptions about eco-tourism being less fun or luxurious might discourage travelers. And there is negative perception about products from reused materials. The analysis of the interviews helped to find additional factors influencing the transition to circular tourism in the case of Kazakhstan. These findings:

- The need to consider the specifics of individual regions, driving forces and barriers may vary depending on the specific type of tourism and environmental problems in different regions of Kazakhstan.

- Important role of technology and innovation to provide solutions to improve energy efficiency, water management and waste management in the tourism sector.

- The importance of public oversight, regular monitoring of the effectiveness of policies, incentives and network initiatives is critical for continuous improvement.

By addressing these barriers and harnessing the driving forces, emerging tourism destinations can promote sustainable tourism practices and facilitate the transition to circular economy, benefiting the environment, local communities and the tourism industry itself.

## **DISCUSSION**

According to classification of Bauwens et al. (2020), policy and regulation of Kazakhstan relating to transition circular economy identified predominantly as “planned circularity” with some elements of circular modernism. In the analyzed regulatory documents and reports the dominant rule of centralized governance with “low-tech” and in some cases force for “high-tech” innovations were identified. Particularly, this is clear from ban, limits and quotas for

resource use and waste generation, in simpler terms, this scenario describes a future where the government takes strict control over both production and consumption to push everyone towards "high R" strategies, which prioritize reuse, repair, and recycling (Bauwens et al., 2020). Finally, Kazakhstan's policies currently neglect alternative systems like local self-reliance and decentralized sharing models. While this scenario could limit consumer choice and force companies to follow government regulations, it could also push the adoption of new technologies.

A review of the literature showed importance of institutional factors such as policy and regulation, financial incentives and social cooperation for transition to circular economy. The findings also confirmed results of previous research that holistic perspective in policy and regulation needs (Hartley et al., 2023; Ranta et al., 2018), lack of awareness of customers among the barriers (Kirchherr et al., 2018) and focus on learning and importance of collaborative network for transition to circular economy (Dagilienè et al., 2021; Henrysson and Nuur, 2021). The study partly confirmed needs for coercive and mimetic pressure for transition to circular economy (Alonso-Almeida and Rodríguez-Antón, 2020) by emphasizing public pressure as a driver and weak enforcement of policy and regulation as a barrier for transition to circular economy in tourism. Some institutional drivers and barriers of circular economy in tourism finding from this study are specific for emerging destinations, they are bureaucracy and complex permitting processes, limited resources and influencer marketing importance for transition to circular economy in tourism. This knowledge can be valuable for other emerging destinations by allowing them to anticipate and address similar obstacles.

Experience from other countries and research highlight the importance of developing policies that support the transition to a circular economy; Kazakhstan, like many developing destinations, does not have a clear regulatory framework and supporting initiatives for the transition to circularity, particularly in tourism.

Comparing Kazakhstan's experience with global examples, while Kazakhstan faces unique regulatory challenges, the emphasis on stakeholder collaboration is consistent with successful practices observed in other regions. This highlights the need to develop tailored strategies tailored to local conditions.

## CONCLUSION

Institutions play a significant role in shaping the adoption of circular economy practices in the tourism sector. Addressing policy gaps, strengthening enforcement mechanisms, providing financial incentives, investing in knowledge and capacity building, and engaging local communities are key steps to transitioning to a circular tourism.

The findings of this study are intended to assist decision makers in developing guidelines to choose strategies towards more sustainable tourism. This study highlights the urgent need to improve understanding of circular economy among businesses and communities in developing tourism destinations. The practical significance for policy makers and practitioners is to develop the following recommendations:

- Development of consistent policies at all levels of government with clear goals and step-by-step guidelines for tourism business including regulatory in waste reduction, recycling target and sustainable resource use.
- Reducing bureaucracy and developing financial instruments and to encourage businesses to implement circular practices in tourism. For example, as one industry respondent suggested during the interview, this could include subsidies covering up to 50% of the costs of installing energy efficient systems and using recycled materials in tourism infrastructure projects. Also, to move toward high-tech circularity, establish grants for academic and industry partnerships to develop and pilot circular economy innovations, such as eco-friendly packaging or waste-to-resource initiatives. Another funding direction is development infrastructure for circular practices such as recycling and composting facilities.
- Establishing industry environmental standards and certification programs to encourage and recognize enterprises using circular practices. To achieve this, the national DMO Kazakh Tourism should initiated the implementation of a national green certification program for tourism enterprises that meet the criteria of a circular economy, providing them with marketing advantages and consumer trust.
- Foster collaboration and partnerships between different stakeholders within the destinations to promote and develop circular practices. This could be achieved by creating a digital platform for stakeholders in the tourism sector to share resources, best practices and collaborate on circular economy projects.
- Special attention should be paid to education and awareness program for tourism actors and consumers. For successful practical implementation nationwide campaign in social media with involvement of influencers and signage at the destination to educate tourists about sustainable practices and how to reduce their environmental impact when traveling are recommended.

The study's theoretical contribution is to highlight the limited effectiveness of regulatory frameworks without economic incentives, contributing to the ongoing debate about policy instruments for the transition to sustainable development. Businesses can use the study's recommendations to identify opportunities to improve resource efficiency, reduce waste, and collaborate with local communities to implement circular practices that can lead to cost savings and improved brand image. Non-governmental and community organizations can use the study's findings to advocate for policies that support circularity in tourism and raise awareness among tourists and local communities about the benefits of sustainable tourism practices.

The main limitation of the study is its geographical focus, primarily on Kazakhstan, which may limit the generalizability of the findings to other regions with different socio-economic and regulatory environments. Although the study focuses on Kazakhstan, the three-pillar framework (policy and regulation, incentives and social cooperation) can be applied to any emerging destination considering transition to circular economy in tourism. This allows readers to assess their own context and identify relevant drivers and barriers.

The study goes beyond general challenges and identifies specific obstacles facing developing countries such as Kazakhstan, including inconsistent policies, limited resources, and lack of awareness. This knowledge may be useful for



other emerging fields by allowing them to anticipate and address similar obstacles. Using a case study, the study provides rich empirical evidence and real-life examples of how these drivers and barriers play out in practice.

Further, this research provides a high-level overview of addressing circular economy barriers but lacks specific actions for businesses. To move forward, research should explore how to adapt circular economy concepts for the service and hospitality industries. In addition, while the study highlights the importance of institutions, it might overlook other factors influencing circular economy implementation, such as technological advancements, consumer behavior, and economic conditions. There is no universal approach to the transition to circular economy; it is necessary to consider institutions both formal such as policy and regulation, and informal such as socio-cultural norms, interaction between stakeholders. This study specifically analyzes the institutions that promote and hinder the introduction of circular economy in tourism of developing destinations, which provides valuable information to develop effective support strategies.

Future research should delve deeper into these factors and explore specific solutions tailored to the unique context of different tourism destinations, revealing the enormous potential of circular economy for a more sustainable tourism future. Future research directions may also involve understanding the specific influence of individual institutional factors on the adoption of circular economy in the tourism context.

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