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Current state of the tourism industry in the East Kazakhstan region

Abstract. *The article studies the problems and prospects for the development of the tourism industry in East Kazakhstan, analyzes the most important indicators of tourism development, such as the share of domestic and international tourism and the share of the tourist industry in the gross domestic product of the Republic of Kazakhstan. Also, it represents a comprehensive analysis of the current state of tourist sites of the Katon-Karagai and Urdzhar districts of the East Kazakhstan region supported with statistical data. The article examines current trends and long term prospects for the development of regional tourism in the Republic of Kazakhstan. The paper considers the role of tourism services in the region, identifies the main constraints to the development of this industry and the main issues of tourism development in the region and outlines the ways to tackle the problems in tourism industry of East Kazakhstan.*

Keywords: *tourism, tourism industry, tourism development efficiency, tourism resources, tourism investments.*

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Introduction. Tourism is not only the largest, but also dynamically developing sector of the world economy, the growth rate of which is almost 2 times higher than the growth rate of other sectors of the economy. Globally, in terms of key indicators, including the effectiveness of investment, tourism is comparable to the oil industry.

The East Kazakhstan region is one of the most promising regions for the development of the tourism industry in Kazakhstan and is perceived as one of the most successful areas that have made a huge contribution to the modern development of Kazakh culture. Such scientists and thinkers as Abay Kunanbayev, Shakarim Kudaiberdiev, Mukhtar Auezov glorified the Earth of East Kazakhstan all over the world. In addition, there are 24 nature reserves of national importance with an area of 1.7 million hectares, over 600 historical monuments and over 100 touristic sites. this determines the relevance of this article.

It is necessary to conduct a comprehensive analysis of the current state of the industry for the sustainable and effective development of the tourism industry in East Kazakhstan,

Problem statement. To solve the problems of sustainable development of the tourism industry and its modernization, it is necessary, taking into account the geographical diversity of the region, to find new forms and methods for the effective use of the specific features of the natural resource potential, with their subsequent implementation in practice.

Goals. The main purpose of the article is to study the current state of the tourism industry in the East Kazakhstan region, and also, based on the identification of problems, determine the main directions of effective development and provide recommendations on increasing the competitiveness of the tourism industry in the region. The object of the study is indicators of the development of the tourism industry in the

Katon-Karagai and Urjar districts of the East Kazakhstan region.

Researches by domestic and foreign economists on the development efficiency of the tourism industry have comprised the theoretical and methodological basis of the study.

Research methods. A set of methods of economic research, such as monographic, abstract-logical and economic-statistical have been used in the study. As the source material, the statistical data of the collections and bulletins of the Statistics Committee of the Ministry of National Economy of the Republic of Kazakhstan (hereinafter referred to as MNE RK) have been applied.

History. The history of the tourism industry was reflected in the works of domestic Kazakhstan authors G. Myrzagulova and M. Tamazhanova, where they outlined the main social goal of tourism, which is to increase human life and improve the quality of life of the population. The main social value of tourism is interacting with nature and new people. Indeed, the highest level of human society (an ideal) is the multiplication of positive forms of human relations, as well as the effective use of these forms [1, 7 p.].

Key characteristics and features of marketing in the tourism industry in the Republic of Kazakhstan are examined in detail in the works of domestic scientists Zh. Aliyev and E. Kalimbetova. In their textbook *Tourism Marketing*, the concept of "tourism product" is considered both in a narrow and broad sense. A narrow-value travel product is a service in certain sectors of the tourism industry (hotel products, travel product of a tour operator, transport company). A tourist product in the broad sense is a complex of goods and services that make up a tour, that is, a standard set of services that is sold to tourists in one "package", so it is called a package tour [2, 12 p.].

The recreational opportunities of East Kazakhstan for the development of tourism are analyzed in the works of A.Egorina N.Kaliakperova, N.Kanatkyzy where the authors indicated that, one of the reasons for the weak development of the tourism industry is that at the state level this direction was not focused on as

a branch of the economy. No attention was paid to integrated forecasting, long-term planning, the territorial organization of tourism of the East Kazakhstan region [3, 384-388 p.].

Along with domestic scientists and economists on the development of the tourism industry, there are many Russian scientists who have contributed to solving a number of problems of the tourism industry in the countries of the former Soviet Union.

I. Zorin [4, p. 14] believes that the tourism system is formed at the junction of three supersystems: nature, society and the national economy and it contains the components of all these supersystems such as natural tourism resources, tourists, and tourist facilities. The state of the tourism industry is directly dependent on the state of these three supersystems.

The main aspects of the economy of the tourism industry, taking into account the specifics of the functioning of hotel enterprises in a market economy and the importance of tourism statistics for planning and assessing the impact of tourism on the economy, are presented in the works of the Russian scientist M. Morozov [5, 113 p.].

The principles and essence of statistics of the main indicators of tourism development are revealed in the works of T.E. Karmanova, O.V. Kaurova and A.N. Maloletko, where they justified the need for a statistical study of tourism by the necessity to obtain objective and reliable information about the state and development of tourism, the tourism industry and its contribution to the total gross domestic product, as well as the need to assess tourist flows, the load on tourist resources and objects of the tourism industry, meet tourist demand and consumer expectations with offers on the tourism market [6, 71 p.].

Results. Development of the tourism industry of the East Kazakhstan region is impossible without solving complex tasks, which include: the lack of a comprehensive view of the region as a tourist destination; insufficiency of the range of services offered; insufficient development of tourist infrastructure, lack of a developed network of modern transport routes; lack of information and advertising of tourist destinations of East Kazakhstan inside and abroad; poor training of

service workers in the tourism industry. It all leads to the orientation of the country on outbound tourism, there is no analysis of stakeholder participation to assess the involvement of the private sector, local community, organizations of tourism destination management [7, 12 p.].

To identify the general picture of the state of the tourism industry, we need to determine the share of tourism in GDP in the Republic of Kazakhstan (1-figure).

As can be seen in the figure, the share of tourism in Kazakhstan's GDP is growing rapidly every year. For example, compared with 2014 and 2015, the share of tourism increased by 1.6%. According to the data presented, it can be seen that the share of the tourism industry to the GDP of Kazakhstan is growing. And by 2025 it is planned to bring its share to an indicator of at least 8%.

East Kazakhstan occupies a favorable geopolitical position, possessing significant natural and recreational resources and has all the necessary prerequisites to become a major player on the world tourism map. At the present stage, the tourism industry is developing at a moderate pace, but it is necessary to create favorable conditions for the development of the industry's potential by reducing barriers and strategic planning.

The tourism industry is an effective incentive for the development of other industries as: construction, trade, agriculture, production of consumer goods and communications [8, 950-953 pp].

Unique historical and cultural values and wildlife attractions contribute to development of many types of domestic and international tourism: educational or sightseeing, scientific, religious, rural, extreme, skiing, health-improving, fishing, hunting, etc.

95% of tourists who visited the region last year were Kazakhstani, the remaining 5% were mainly from the CIS countries and Europe. More than 50% of foreign tourists are residents of the Russian Federation. As for Kazakhstan tourists, the most serious influx is observed from Almaty and Ust-Kamenogorsk. A significant part of tourists also comes from Almaty, Pavlodar and Akmola regions.

An analysis of the current state of the tourism industry in East Kazakhstan shows that this sphere, as a whole, has been developing steadily in recent years. There is an annual increase in domestic tourist flow, the total number of inbound tourism visitors in 2018 increased compared to the previous year by 16% and amounted to 78,873 people. The number of domestic tourists increased compared to 2017 by 15.8% and,

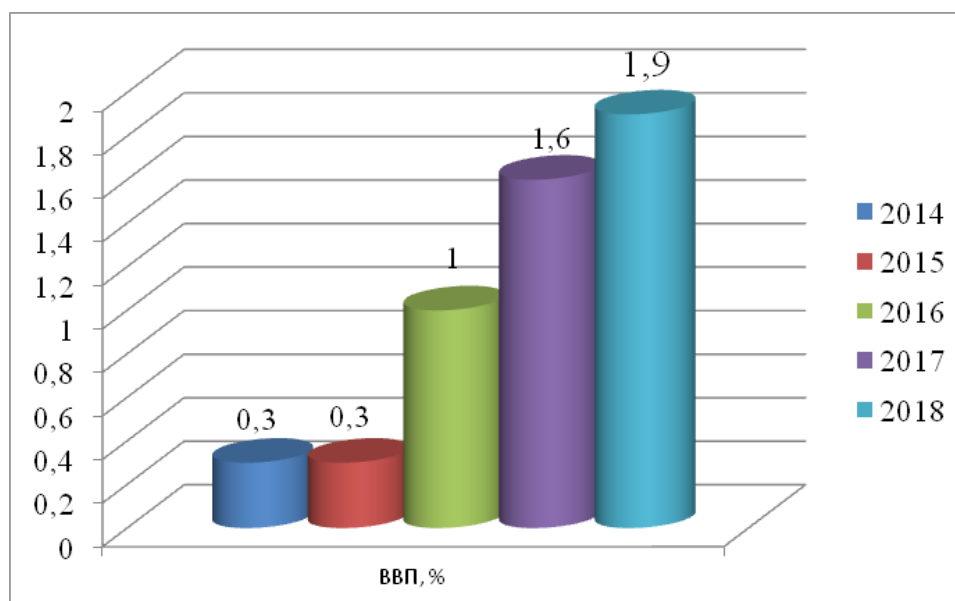


Figure 1 - Contribution of tourism to Kazakhstan's GDP (Gross domestic product)

accordingly, in 2018 amounted to 536184 people. Thus, despite the existing problems, tourism activities are being improved and developed.

Unfortunately, having tremendous tourist potential, the number of tourists coming to the region does not correspond to it at all. East Kazakhstan region accepts fewer tourists so far than our neighbors Russia, Kyrgyzstan and Uzbekistan.

Due to the huge potential of the tourism industry in the region, our country is expanding travel opportunities for tourists. Small and medium-sized businesses involved in organizing the sale of tourism products in the Eastern region offer tourists beneficial tours to tourist sites and it has a positive impact on the tourist flow to the region and leads to an increase in the average annual growth rate.

Today, the development of the tourism industry is especially important for East Kazakhstan, as it contributes to the effective functioning of small and medium-sized businesses and is a priority industry for attracting investments on a large scale.

At this time, the main step to attract tourists to our country is the development of the State program for the development of the tourism industry of the Republic of Kazakhstan for 2019-2025 [9].

The rapidly growing demand for tourism services in the country caused a boom in the construction of small hotels on the coast of Alakol. The Alakol Lake has already been included in the top-10 objects of the Tourism Map of the country as part of the State Tourism Development Project for 2019-2025. The main goal of this project is to ensure at least 8% share of tourism to the total GDP of the Republic of Kazakhstan by 2025.

The budget for the implementation of the State Program comprises more than 1 trillion tenge, about 450 billion tenge is to be allocated from budget funds, while the remaining amount is expected to be attracted by private investors.

To develop the coast infrastructure of the Lake Alakol effectively, about 5.2 billion tenge has been allocated in 2018-2019. In 2019, large infrastructure and investment projects were implemented, including more than 120 million tenge investment for the development of design and estimate documentation. The measures are being taken to improve the coast facilities of 248 million tenge, including the construction of sidewalk and bicycle paths on the coast and parking.

The volume of investment proposals for hotel construction of the Alakol coast from domestic investors has sharply increased.

In East Kazakhstan, the volume of investments in fixed assets for January-September 2018 amounted to 11,237 million tenge, and in 2019 to 25,868 million tenge, while the financial security index amounted to 226.1%.

The situation with tourism in East Kazakhstan is such that we, unfortunately, are losing huge amounts of money that tourism could bring to our country, due to the mismatch of our service with international standards.

The realization of tourism potential is constrained by a number of problems that are characteristic of almost every region of the country: tourism and basic infrastructure, personnel, marketing, the business environment, lack of an adequate legislative base, lack of potential investors among private businesses to implement public and private partnership projects.

Таблица 1

Key indicators of development of the tourism sector in East Kazakhstan

Indicators	2014	2015	2016	2017	2018	2019
number of tourists visiting East Kazakhstan, thousand people, including:	453 063	424336	460878	486157	565030	618178
International tourists	19 279	20587	22463	23177	28846	31477
Domestic tourists	433 784	403749	438415	462980	536184	586701
Note* compiled by the author on the basis of data by the Statistics Committee of the MNE RK						

According to data for January 2020, there is not a single enterprise operating in the tourism industry in East Kazakhstan within the framework of public-private partnership, but a large-scale project «Altai» is being developed in Katon-Karagay district. A clear and illustrative example would be complex projects using public-private partnership in the tourism industry to create a special economic zone of tourist and recreational type. Public-private partnership within the framework of these projects, it is necessary to accumulate budget funds and private investment for the development of the tourism industry in the region.

The popularity of the Katon-Karagai Nature Reserve as one of the most remarkable protected areas of the Republic of Kazakhstan has greatly increased due to the picturesque and almost untouched nature.

By the diversity and beauty of the natural mountain landscapes, the richness of the flora and fauna, turbulent rivers, noisy and rapid waterfalls, healing springs and other attractions, the Katon-Karagai district stands out from other regions of Altai.

It is also famous for its deer parks. The Katon-Karagai National Nature Park was created by the decision of the Government of the Republic of Kazakhstan in the summer of 2001. Pant healing resorts operate in the region during the period of cutting pant for deer and sika deer. The park staff is also engaged in breeding deer. The essence of the tourism industry in the Katon-Karagai district in East Kazakhstan is medical, environmental, rural, social, cultural, educational and active tourism.

There are magnificent sights on the territory of the Katon-Karagai district such as: Berel barrows, the abandoned high-altitude mines Kokkol, Rakhmanovsky Klyuchi - thermal springs, the Lakes: Kokkol, Rakhmanovskoye, Jazevoye, Ushkol, Maralie, Kaumysh, and Kokkol and Ravmanov falls, the North path of The Silk Road, which is known as the Golden Branch of the ancient caravan route, the Austrian road and many others.

The district provides its services to tourists and vacationers. There are 12 panthealing resorts, 5

hotels, 12 guest houses, 12 cafes, 4 restaurants, 19 facilities of consumer services, 1 pharmaceutical workshop for the processing of pant and honey products, a workshop for processing honey products, 2 bus stations and 1 ferry (seasonal).

Sanatoriums and pantheals of the district consist of 95 rooms with a capacity of 900 beds per day.

Roadside service projects are being successfully developed at the expense of entrepreneurs' own funds, providing more additional work places. There are 13 routes and trails in the Katon-Karagai National Park in the places most visited by tourists. The total length of these routs is 673 km.

In Katon-Karagay, tourism today is seasonal in nature, which in turn leads to low profitability. This is due to the fact that the cutting of pants in deer occurs in summer. Tourists are attracted by specific treatment methods at deer-growing farms, in particular, by pantotherapy.

To increase the profitability of the tourism industry in the Katon-Karagai district, it is necessary to develop winter tourism. The tourism budget for the region in October 2019 received only 5% of the total taxes. In Katon-Karagay, today there are only 30 places to accommodate guests, there are difficulties with food catering, so the problem needs to be solved radically. Today, the experts of the Tourism Association of East Kazakhstan are developing a unique project "The Lost Country of Nomads". Its implementation will allow those who wish to enter the era of nomads or primitive people, to master new crafts. The implementation of new projects has already begun. The first 500 million tenge has already been invested by local philanthopists. Experts from the Regional Tourism Association forecast to increase tourism revenues by 100 times and increase the share in the GDP to 30% by 2030 [10].

However, the development of domestic tourism is currently in its infancy for many reasons:

Firstly, the level of prices for accommodation facilities is high enough at their low comfort. Secondly, the population of the Republic of Kazakhstan and neighboring countries is not sufficiently informed about the tourist and

recreational opportunities of East Kazakhstan. Thirdly, travel agencies have problems when working with recreation organizations.

Travel agencies themselves could play a big role in reviving domestic tourism, in informing Kazakhstanis about the tourism priorities in East Kazakhstan region. The local tourism enterprises work mainly with profitable foreign destinations, as they are afraid of high risks of working with domestic travel companies.

The development of the tourism industry shows that some tourism enterprises in Kazakhstan began to gradually show interest in domestic and inbound tourism. This is due to the fact that many countries have long realized the need to extend domestic tourism service programs.

In countries with a developed tourism industry, domestic tourism contributes to the stable position of the national economy due to the redistribution of national income and the development of activities favorable to the country's economy as a whole.

At the beginning of 2020, the world was shocked by the spread of a new unexplored virus infection, COVID-19, of which China is the epicenter. According to the results of the survey, attended by 150 people, 82% of respondents said that because of the situation with coronavirus, trips to foreign countries would be canceled this summer, therefore realistic plans can only be made in relation to inside Kazakhstan tourism, which in turn will lead to increased demand on domestic tour products.

The volume of services provided by the tourism industry in the Republic of Kazakhstan during the pandemic this year fell by almost half, as well as the number of visitors served. In January-June 2020, 1.4 million visitors were served – 1.8 times less than in 2019. Almaty (353.2 thousand people), Nur-Sultan (191.7 thousand people) and East Kazakhstan region (134.8 thousand people) are the leaders in terms of the number of visitors served.

The establishment of an attractive domestic tourism product, enhanced with a variety of basic and additional services, as well as a high level of service is the most important task of developing the tourism market of East Kazakhstan.

The tourism companies attract the local population to serve tourists and develop rural tourism by providing guest houses, selling souvenir products and food, and environmental education.

This year, the region is to witness the 175th anniversary of the great poet and thinker of the Kazakh people Abay Kunanbayuly and this event is an additional incentive to attract tourist flow to the region.

In general, an analysis of the current state of the tourism industry in East Kazakhstan allows us to determine the most profitable projects of state and private partnership both for the needs of tourism entrepreneurship and for the formation of state social and economic programs and tourism development projects.

Many of the problems and the tasks set for the tourism industry cannot be solved without the support of state authorities. And the first State Program for the development of the tourism industry until 2025, approved by the Government of the Republic of Kazakhstan on May 31, 2019, was the conformation of the effective development of the tourism industry in the region.

Conclusion. In order to attract a large number of tourists, it is necessary to improve the tourism infrastructure, namely the transport network and the catering sector, which includes the following aspects:

1) transport Services. Tourist organizations of the East Kazakhstan region mainly use buses and cars, they are not always comfortable and bring great discomfort to tourists. Transport infrastructure, which is a link between various elements of the tourism industry and helps its effective development. Transport infrastructure of the East Kazakhstan region not only provides communication between tourism centers, it is also used in everyday life by ordinary citizens who do not have tourist goals. There is no international airport in the region, the network of railway stations is not developed, bus stations do not meet modern requirements, for this reason, you need a deep detailed study of the objects that are available to identify weaknesses and growth points.

2) it is necessary to build modern restaurants, cafes and eateries in all resort areas of the East Kazakhstan region, taking into account different food preferences.

The service in the tourist destination is still at a low level, tourist companies do not conduct a survey or study on the quality of services, so

there is no feedback, and JSC Kazakh Tourism does not monitor these issues. To solve these problems, it is necessary to create clusters, then each private representative of the tourism and hotel business will not have preferences, which in turn will contribute to improving the quality of services provided in the tourism industry.

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Шығыс Қазақстан облысындағы туризм индустриясының қазіргі жағдайы

Аннотация. Мақалада Шығыс Қазақстанда туризм индустриясын дамытудың проблемалары мен перспективалары зерттелді. Сонымен қатар, туризмді дамыту жолындағы маңызды көрсеткіштер: келу және шығу туризмінің көлемі, Қазақстан Республикасының ішкі жалпы өніміндегі туристік саланың үлесі сияқты көрсеткіштеріне талдау жүргізілді. Статистикалық деректер негізінде Шығыс Қазақстан облысының Катонқарағай және Үржар ауданының туристік нысандарының қазіргі жағдайы айқындалды. Мақалада Қазақстан Республикасының ұзақ мерзімді кезеңдегі аймақтық туризмнің даму тенденциялары мен перспективалары да қарастырылды. Облыстағы туристік қызмет көрсету объектілерінің рөлі мен осы саланы дамытудың негізгі тежеуші факторлары және өңірдегі туризмді дамытудың негізгі мәселелері анықталып, ШҚО-дағы туризм индустриясындамыту жолдары ұсынылды.

Түйін сөздер: туризм, туризм индустриясы, туризмді дамытудың тиімділігі, туристік ресурстар, туризмге арналған инвестиция.

Современное состояние индустрии туризма в Восточно-Казахстанской области

Аннотация. В статье исследуются проблемы и перспективы развития туристской отрасли Восточного Казахстана, анализируются наиболее важные показатели развития туризма, такие как доля внутреннего и международного туризма и доля туристской отрасли в валовом внутреннем продукте Республики Казахстан. Также проведен комплексный анализ современного состояния туристических объектов Катон-Карагайского и Урджарского районов Восточно-Казахстанской области. В статье рассматриваются современные тенденции и долгосрочные перспективы развития регионального туризма в РК, роль туристских услуг в регионе, выявлены основные сдерживающие факторы развития индустрии туризма и основные пути решения проблем развития туризма в регионе.

Ключевые слова: туризм, индустрия туризма, эффективность развития туризма, туристские ресурсы, инвестиции в туризм.

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