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CONTENTS

PEDAGOGY

Abylkassymova A., Yeskhozhayeva S., Zhumabay N. Developing students' mathematical literacy through contextual problems based on stem education.....	16
Adaskanova Zh.K., Moldasan K.Sh., Tsay Y. Professional-research thinking of the future educational psychologist: concept and structure.....	41
Aliyeva Zh.Zh., Baikenzheyeva A.T., Arystanova S.D. Developing entrepreneurial skills in biology majors within the framework of the minor supplementary educational program.....	55
Akhmetova D.M., Oryngaliyeva Sh.O., Kundakova A. Methodological foundations for the use of regional oral history materials in school practice when teaching the topic of women on the home front.....	72
Baishuakova A.D., Aldabergenova M.K., Zhadrayeva G.A. Epistolary sources as a means of developing historical thinking in future history teachers.....	90
Boztayeva S.Zh., Amrenova G.R., Jumabayeva S.T. Features of the development of coordination abilities of university students.....	104
Darkulova K.N., Turgynbayeva Zh.M., Kuttybayeva Zh.F. The influence of modern digital technologies on the formation of academic writing competencies among students.....	117
Dzhumanova L.S., Kaskataeva Zh.A., Turbaeva S.M. Problems of using artificial intelligence in education.....	133
Yermekbayeva A., Suleimenova K., Shormakova A.B. The role of assessment criteria in improving academic writing in higher education.....	151
Zhanys A.B. Digital variative mathematics education for agricultural engineers.....	166
Zhussupbekova B.A., Kulanbayeva G.K. Historical and psychological portrait of Mustafa Chokay.....	183
Kegenbekov J.K., Urazakynov D.K. The relevance of career guidance training in biophysics at medical universities.....	199
Kemelbekova Zh.S., Kopzhasarova Zh.B. Generative artificial intelligence tools in education: PRISMA 2020-based analysis and improvement model.....	218

Kurymbayeva S.K., Baizhumanova N.S., Bakina Y.A. Higher education instructors competencies in using AI in the inclusive education process.....	237
Massalimova B.K., Shintemirova M.T., Nurkenova A.D. Using STEM technologies to develop students' research skills.....	259
Orazaliyeva R., Ametkhan Zh. Folk pedagogy as a source of development of the ethno-artistic potential of students of creative specialties of the university of Kazakhstan.....	285
Pilten P., Pilten G., Kuralbayeva A. Pedagogical approaches to values education among primary school teachers.....	301
Sugirbekova A., Nametkulova F., Tasbolat E. Methodology for preparing future physics teachers to organize students' research activities.....	320
Tankibayeva A.A., Turalbayeva A.T., Baimukhanbetov B.M. Formation of professional competencies of future primary school teachers on the basis of micro-learning.....	340
Shyndaliev N.T., Serikkazy A.S., Nurbekova G.F. Enhancing students' professional competencies in big data processing through artificial intelligence: results of a pedagogical experiment.....	364

ECONOMICS

Aitkazina M., Karshalova A., Biken V. Analysis of green lending programs of second-tier banks and development institutions in the Republic of Kazakhstan.....	380
Aitmanbetova R., Bukharbaeva A. Improving accounting and audit systems through digitalization in Kazakhstan's agricultural sector: a current approach.....	403
Altai M.T., Mustafayeva B.U., Kulbaeva M.A. Development of the tourism industry as a factor of economic growth in the Turkestan Region: institutional and legal aspect.....	423
Assanova Zh., Mahfudz A.A., Turysbekova R. Environmental audit as an accounting and analytical tool for ensuring sustainable development in the Republic of Kazakhstan.....	438
Ashirbayeva S.B., Yessirkepova A.M., Alzhanova A.A. Methodological approaches to assessing the economic efficiency of forestry in the context of climate change.....	465
Yeltay B.B., Azatbek T.A. Evaluating the effectiveness of state regulation and institutional environment formation in the non-ferrous metallurgy sector.....	486

Zhaukhanova A.K., Muslimkyzy L.

The impact of investment processes on the development of the labor market of the Republic of Kazakhstan.....510

Kaliyeva S., Umurzakova B.

Human capital management in project-based banks of the Republic of Kazakhstan.....529

Kamardinov Y., Moldashbayeva L., Satymbekova K.

Digital transformation of accounting of transport and logistics services based on AI and Big Data.....544

Karanova Zh.Y., Kazhmuratova A.K., Chakeyeva K.S.

China–Kazakhstan transport corridor: digitalization and efficiency in the context of growing freight flows.....564

Kozhakhmetova K., Rakhmatullayeva D.Zh., Ruziev K.

Multicriteria analysis in ESG-oriented portfolio optimization.....587

Madysheva M.Zh., Mazbayeva K.O.

Cost audit in a commercial healthcare company: assessment of efficiency and transparency.....609

Mamutova K.K., Pashenova L.M., Aitymbetova A.N.

Digitalization of tax administration in Kazakhstan: modern technologies and development directions.....627

Narimanov R.N., Niyetalina G.K., Tayauova G.Zh.

Comparison of quiet luxury and logo branding in the context of consumer status signaling in Kazakhstan.....640

Nizamdinova A., Hao Zhen, Dzhakisheva U.

Improving the mechanisms of strategic management accounting in renewable energy enterprises.....657

Nurlybek Zh.A., Nurgaliyev K.M., Tynyshbayeva A.A.

Investment screening as a state governance mechanism of foreign capital access: the Australian experience.....675

Pakhuasheva D.S., Ermekbayeva D.D., Duiskanova R.Zh.

Strategic management of sustainable development of hotel chains in Kazakhstan.....698

Primzharova K., Bissenbayeva S., Zhumaxanova K.M.

Social entrepreneurship in the Republic of Kazakhstan: stages of formation and mechanisms of development.....726

Tulaganov A.B., Nurmagambetova A.I., Bigozhin R.M.

Contribution of higher education system to implementation of sustainable development goals in Kazakhstan.....750

Tuleeva A., Karabaeva Sh., Yessentayeva A.

Digital IT marketing as a tool for enhancing the competitiveness of agro-industrial enterprises.....765

МАЗМҰНЫ

ПЕДАГОГИКА

Әбілқасымова А.Е., Есхожаева С.М., Жұмабай Н.

STEM білім беру негізінде контекстік есептер арқылы оқушылардың математикалық сауаттылығын дамыту.....16

Адасканова Ж.К., Молдасан К.Ш., Цай Е.

Болашақ педагог-психологтың кәсіби-зерттеушілік ойлауы: ұғымы және құрылымы.....41

Әлиева Ж.Ж., Байкенжеева А.Т., Арыстанова С.Д.

Міног қосымша білім беру бағдарламасы аясында биология мамандығы студенттерінің кәсіпкерлік дағдыларын дамыту.....55

Ахметова Д.М., Орынғалиева Ш.О., Құндақова А.

Тылдағы әйелдер тақырыбын оқытуда өңірлік ауызша тарих материалдарын мектеп практикасында қолданудың әдістемелік негіздері.....72

Байшуакова А.Д., Алдабергенова М.К., Жадраева Г.А.

Эпистолярлық деректер болашақ тарих мұғалімдерінің тарихи ойлауын дамытудың құралы ретінде.....90

Бозтаева С.Ж., Амренова Г.Р., Джұмабаева С.Т.

Университет студенттерінің үйлестіру қабілеттерін дамыту ерекшеліктері.....104

Даркулова К.Н., Тургынбаева Ж.М., Куттыбаева Ж.Ф.

Заманауи цифрлық технологиялардың студенттердің академиялық жазу құзыреттілігін қалыптастыруға әсері.....117

Жұманова Л.С., Қасқатаева Ж.А., Турбаева С.М.

Білім беру саласында жасанды интеллектті пайдалану проблемалары.....133

Ермекбаева А., Сулейменова Қ., Шормақова А.Б.

Жоғары оқу орнында болашақ филологтардың академиялық жазылымын дамытудағы критерийлік бағалау рөлі.....151

Жаныс А.Б.

Агроинженерлерге математиканы цифрлық вариативті оқыту.....166

Жусупбекова Б.А., Куланбаева Г.К.

Мұстафа Шоқайдың тарихи-психологиялық портреті.....183

Кегенбеков Ж.К., Уразақынов Д.К.

Медициналық жоғары оқу орындарында биофизика курсын кәсіби бағдарлы оқытудың өзектілігі.....199

Кемельбекова Ж.С., Копжасарова Ж.Б.

Білім берудегі генеративті жасанды интеллект құралдары: PRIMSA 2020 негізіндегі талдау және жетілдіру моделі.....218

Құрымбаева С.Қ., Байжұманова Н.С., Бакина Ю.А.

ЖОО оқытушыларының инклюзивті білім беру процесіндегі ЖИ қолдану құзіреттері.....237

Масалимова Б.К., Шинтемирова М.Т., Нүркенова А.Д.

Оқушылардың зерттеу дағдыларын дамыту үшін STEM технологияларын қолдану.....259

Оразалиева Р., Аметхан Ж.

Халықтық педагогика Қазақстанның жоғары оқу орындарындағы шығармашылық мамандықтары студенттерінің этномәдени әлеуетін дамыту көзі ретінде.....285

Пилтен П., Пилтен Г., Құралбаева А.

Бастауыш сынып мұғалімдерінің құндылықтарға негізделген білім берудегі педагогикалық тәсілдері.....301

Сугирбекова А., Наметкулова Ф., Тасболат Е.

Болашақ физика мұғалімдерін оқушылардың зерттеу әрекетін ұйымдастыруға даярлау әдістемесі.....320

Танкибаева А.А., Туралбаева А.Т., Баймуханбетов Б.М.

Микрооқыту негізінде болашақ бастауыш сынып мұғалімдерінің кәсіби құзыреттілігін қалыптастыру.....340

Шындалиев Н.Т., Серікқазы Ә.С., Нурбекова Г.Ф.

Жасанды интеллект арқылы студенттердің үлкен деректерді өңдеудегі кәсіби құзыреттілігін арттыру: педагогикалық эксперимент нәтижелері.....364

ЭКОНОМИКА**Айтқазина М., Каршалова А., Бикен В.**

Қазақстан Республикасындағы екінші деңгейдегі банктер мен даму институттарын «жасыл» несиелеу бағдарламаларын талдау.....380

Айтманбетова Р., Бұхарбаева А.

Қазақстанның ауыл шаруашылығы секторындағы бухгалтерлік есепті цифрландыру жағдайында бухгалтерлік есеп және аудит жүйесін жетілдіру.....403

Алтай М.Т., Мустафаева Б.У., Құлбаева М.А.

Түркістан облысының экономикалық өсу факторы ретінде туристік саланы дамыту: институционалдық-құқықтық аспект.....423

Асанова Ж., Махфудз А.А., Турысбекова Р.

Қазақстан Республикасында орнықты дамуды қамтамасыз етудің есепке алу-талдау құралы ретінде экологиялық аудит.....438

Аширбаева С.Б., Есиркепова А.М., Альжанова А.А.

Климаттық өзгерістер жағдайында орман шаруашылығының экономикалық тиімділігін бағалаудың әдістемелік тәсілдері.....465

Елтай Б.Б., Азатбек Т.А.

Түсті металлургия саласын мемлекеттік реттеудің және институционалдық ортаны қалыптастырудың тиімділігін бағалау.....486

Жауханова А.К., Муслимқызы Л.

Қазақстан Республикасының еңбек нарығының дамуына инвестициялық үдерістердің әсері.....510

Қалиева С., Умурзакова Б.

Қазақстан Республикасының жобалық басқару моделін қолданатын банктеріндегі адам капиталын басқару.....529

Камардинов Е., Молдашбаева Л., Сатымбекова К.

AI және Big Data негізінде көлік-логистикалық қызметтердің бухгалтерлік есебін цифрлық трансформациялау.....544

Каранова Ж.У., Қажымұратова А.К., Чакеева К.С.

Қытай–Қазақстан көлік дәлізі: жүк ағындарының өсуі жағдайында цифрландыру және тиімділік.....564

Кожаметова К., Рахматуллаева Д.Ж., Рузиев К.

ESG-бағдарланған портфельді оңтайландырудағы көп критериялды талдау.....587

Мадышева М.Ж., Мазбаева К.О.

Коммерциялық денсаулық сақтау кәсіпорнындағы шығындар аудиті: тиімділік пен ашықтықты бағалау.....609

Мамутова Қ.Қ., Пашенова Л.М., Айтымбетова А.Н.

Қазақстандағы салық әкімшілендіруді цифрландыру: заманауи технологиялар және даму бағыттары.....627

Нариманов Р.Н., Ниеталина Г.К., Таяуова Г.Ж.

Қазақстандағы тұтынушылардың статус дабылы контекстінде quiet luxury және logo branding салыстырмалы талдау.....640

Низамдинова А., Хао Чжэнь, Джакишева У.

Жаңартылатын энергия кәсіпорындарында стратегиялық басқарушылық есеп механизмдерін жетілдіру.....657

Нұрлыбек Ж.А., Нұрғалиев Қ.М., Тынышбаева А.А.

Шетел капиталына қолжетімділікті реттеудің мемлекеттік басқару механизмі
ретіндегі инвестициялық скрининг: Австралия тәжірибесі.....675

Пахуашева Д.С., Ермекбаева Д.Д., Дүйскенова Р.Ж.

Қазақстанның қонақ үй желілерінің тұрақты дамуын стратегиялық басқару.....698

Примжарова Қ., Бисенбаева С., Жұмаксанова К.М.

Қазақстан Республикасындағы әлеуметтік кәсіпкерлік: қалыптасу кезеңдері
және даму тетіктері.....726

Тулағанов А.Б., Нұрмағамбетова А.И., Бигожин Р.М.

Қазақстандағы жоғары білім беру жүйесінің орнықты даму мақсаттарын
жүзеге асыруға үлесі.....750

Тулеева А., Карабаева Ш., Есентаева А.

Агроөнеркәсіптік кәсіпорындардың бәсекеге қабілеттілігін арттыру құралы
ретіндегі цифрлық IT-маркетинг.....765

СОДЕРЖАНИЕ

ПЕДАГОГИКА

Абылкасымова А.Е., Есхожаева С.М., Жумабай Н.

Развитие математической грамотности учащихся посредством контекстных задач в рамках STEM-образования.....16

Адасканова Ж.К., Молдасан К.Ш., Цай Е.

Профессионально-исследовательское мышление будущего педагога-психолога: понятие и структура.....41

Алиева Ж.Ж., Байкенжеева А.Т., Арыстанова С.Д.

Развитие предпринимательских навыков у студентов специальности «Биология» в рамках дополнительной образовательной программы Minor.....55

Ахметова Д.М., Орынғалиева Ш.О., Кундакова А.

Методические основы использования материалов региональной устной истории в школьной практике при изучении темы женщин тыла.....72

Байшуакова А., Алдабергенова М., Жадраева Г.

Эпистолярные источники как средство развития исторического мышления будущих учителей истории.....90

Бозтаева С.Ж., Амренова Г.Р., Джумабаева С.Т.

Особенности развития координационных способностей студентов вузов.....104

Даркулова К.Н., Тургынбаева Ж.М., Куттыбаева Ж.Ф.

Влияние современных цифровых технологий на формирование компетенций академического письма у студентов.....117

Джуманова Л.С., Каскатаева Ж.А., Турбаева С.М.

Проблемы использования искусственного интеллекта в сфере образования.....133

Ермекбаева А., Сулейменова К., Шормакова А.

Роль критериального оценивания в развитии академического письма будущих филологов в вузе.....151

Жаныс А.

Цифровое вариативное обучение математике агроинженеров.....166

Жусупбекова Б.А., Куланбаева Г.К.

Историко-психологический портрет Мустафы Шокая.....183

Кегенбеков Ж.К., Уразакынов Д.К.

Актуальность профориентационного обучения курсу биофизики в медицинских вузах.....199

Кемельбекова Ж.С., Копжасарова Ж.Б.

Генеративные инструменты искусственного интеллекта в образовании: анализ по PRISMA 2020 и модель совершенствования.....218

Курымбаева С.К., Байжуманова Н.С., Бакина Ю.А.

Компетенции преподавателей вузов по использованию ИИ в процессе инклюзивного образования.....237

Масалимова Б.К., Шинтемирова М.Т., Нуркенова А.Д.

Использование STEM-технологий для развития исследовательских навыков учащихся.....259

Оразалиева Р., Аметхан Ж.

Народная педагогика как источник развития этнохудожественного потенциала студентов творческих специальностей вуза Казахстана.....285

Пилтен П., Пилтен Г., Куралбаева А.

Педагогические подходы к ценностно-ориентированному образованию у учителей начальных классов.....301

Сугирбекова А., Наметкулова Ф., Тасболат Е.

Методика подготовки будущих учителей физики к организации исследовательской деятельности.....320

Танкибаева А.А., Туралбаева А.Т., Баймуханбетов Б.М.

Формирование профессиональной компетентности будущих учителей начальных классов на основе микрообучения.....340

Шындалиев Н.Т., Серикказы А.С., Нурбекова Г.Ф.

Повышение профессиональной компетентности студентов в обработке больших данных с использованием искусственного интеллекта: результаты педагогического эксперимента.....364

ЭКОНОМИКА**Айтказина М., Каршалова А., Бикен В.**

Анализ программ зеленого кредитования банков второго уровня и институтов развития в Республике Казахстан.....380

Айтманбетова Р., Бухарбаева А.

Совершенствование системы учета и аудита в условиях цифровизации бухгалтерского учета аграрного сектора Казахстана.....403

Алтай М.Т., Мустафаева Б.У., Кулбаева М.А.

Развитие туристской отрасли как фактор экономического роста Туркестанской области: институционально-правовой аспект.....423

Асанова Ж., Махфудз А.А., Турысбекова Р.

Экологический аудит как учетно-аналитический инструмент обеспечения устойчивого развития в Республике Казахстан.....438

Аширбаева С.Б., Есиркепова А.М., Альжанова А.А.

Методические подходы к оценке экономической эффективности функционирования лесного хозяйства в условиях климатических изменений.....465

Елтай Б.Б., Азатбек Т.А.

Оценка эффективности государственного регулирования и формирования институциональной среды в сфере цветной металлургии.....486

Жауханова А.К., Муслимкызы Л.

Влияние инвестиционных процессов на развитие рынка труда Республики Казахстан.....510

Калиева С., Умурзакова Б.

Управление человеческим капиталом в банках Республики Казахстан с проектной моделью управления.....529

Камардинов Е., Молдашбаева Л., Сатымбекова К.

Цифровая трансформация бухгалтерского учета транспортно-логистических услуг на основе AI и Big Data.....544

Каранова Ж.У., Кажмуратова А.К., Чакеева К.С.

Транспортный коридор Китай–Казахстан: цифровизация и эффективность в условиях роста грузопотоков.....654

Кожакметова К., Рахматуллаева Д.Ж., Рузиев К.

Многокритериальный анализ в ESG-ориентированной портфельной оптимизации.....587

Мадышева М.Ж., Мазбаева К.О.

Аудит расходов в коммерческом предприятии здравоохранения: оценка эффективности и прозрачности.....609

Мамутова К.К., Пашенова Л.М., Айтымбетова А.Н.

Цифровизация налогового администрирования в Казахстане: современные технологии и направления развития.....627

Нариманов Р.Н., Ниеталина Г.К., Таяуова Г.Ж.

Сравнение quiet luxury и logo branding в контексте статусной сигнализации потребителей в Казахстане.....640

Низамдинова А., Хао Чжэнь, Джакишева У.

Совершенствование механизмов стратегического управленческого учета в предприятиях возобновляемой энергетики.....657

Нурлыбек Ж.А., Нурғалиев К.М., Тынышбаева А.А.

Инвестиционный скрининг как механизм государственного управления
доступом иностранного капитала: опыт Австралии.....675

Пахуашева Д.С., Ермекбаева Д.Д., Дуйскенова Р.Ж.

Стратегическое управление устойчивым развитием гостиничных сетей
Казахстана.....698

Примжарова К., Бисенбаева С., Жумаханова К.М.

Социальное предпринимательство в Республике Казахстан: этапы становления
и механизмы развития.....726

Тулаганов А.Б., Нурмагамбетова А.И., Бигожин Р.М.

Вклад системы высшего образования в реализацию целей устойчивого развития
в Казахстане.....750

Тулеева А., Карабаева Ш., Есентаева А.

Цифровой IT-маркетинг как инструмент повышения конкурентоспособности
предприятий агропромышленного комплекса.....765

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STRATEGIC MANAGEMENT OF SUSTAINABLE DEVELOPMENT OF HOTEL CHAINS IN KAZAKHSTAN

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Annotation. The article examines the scientific, methodological and applied aspects of strategic management of the sustainable development of hotel chains in Kazakhstan in the context of the transformation of the tourism market, increased competition, digitalization of service processes and the growing importance of the ESG agenda. *The relevance of the research* is determined by the need to increase the competitiveness of hotel enterprises, adapt their business models to modern requirements of sustainable tourism, as well as form management mechanisms that ensure a balance of economic, environmental and social outcomes. *The purpose of the article* is to develop an integrated strategic management model for the sustainable development of hotel chains in Kazakhstan. *The methodological basis of the research* consists of systematic, comparative, institutional and strategic approaches, as well as methods of generalization, classification, analysis of factors of the external and internal environment and conceptual modelling. The paper analyses the main trends in the development of the hotel sector in Kazakhstan, identifies key factors and barriers to the sustainable development of hotel chains, defines the role of digital transformation, ESG tools, human resources and customer experience in improving management efficiency. Special attention is paid to classifying hotel chains according to strategic development models and substantiating the relationship between sustainability, innovation and quality

of services. *The results of the study* propose an integrated model that combines strategic planning, digital management, ESG practices, resource efficiency, social responsibility, and a sustainability monitoring system. The results obtained allow us to consider sustainable development as an integrated management process, including long-term positioning, organizational flexibility and the introduction of modern standards of hotel management. *The practical significance of the research* lies in the possibility of applying the proposed approach to the development of strategies for the development of hotel chains, increasing their adaptability, investment attractiveness and strengthening Kazakhstan's position in the market of tourist and hotel services in the long term.

Keywords: hotel chains, sustainable development, strategic management, ESG, digital transformation, hotel sector, Kazakhstan, hospitality industry

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ҚАЗАҚСТАННЫҢ ҚОНАҚ ҮЙ ЖЕЛІЛЕРІНІҢ ТҰРАҚТЫ ДАМУЫН СТРАТЕГИЯЛЫҚ БАСҚАРУ

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Аннотация. Мақалада туристік нарықты трансформациялау, бәсекелестікті күшейту, сервистік процестерді цифрландыру және ESG-күн тәртібінің маңыздылығын арттыру жағдайында Қазақстанның қонақ үй желілерінің тұрақты дамуын стратегиялық басқарудың ғылыми-әдістемелік және қолданбалы аспектілері қарастырылады. Зерттеудің өзектілігі қонақ үй кәсіпорындарының бәсекеге қабілеттілігін арттыру, олардың бизнес-модельдерін тұрақты туризмнің заманауи талаптарына бейімдеу, сондай-ақ экономикалық, экологиялық және әлеуметтік нәтижелердің тепе-теңдігін қамтамасыз ететін басқару тетіктерін қалыптастыру қажеттілігімен анықталады. *Мақаланың мақсаты* Қазақстанның қонақ үй желілерінің

тұрақты дамуын стратегиялық басқарудың интегралды моделін әзірлеу болып табылады. *Зерттеудің әдіснамалық негізін* жүйелік, салыстырмалы, институционалдық және стратегиялық тәсілдер, сондай-ақ сыртқы және ішкі орта факторларын жалпылау, жіктеу, талдау және тұжырымдамалық модельдеу әдістері құрады. Жұмыста Қазақстанның қонақ үй секторы дамуының негізгі тенденциялары талданды, қонақ үй желілерінің тұрақты дамуының негізгі факторлары мен кедергілері анықталды, цифрлық трансформацияның, ESG-құралдарының, кадрлық әлеуеттің және басқару тиімділігін арттырудағы клиенттік тәжірибенің рөлі айқындалды. Қонақ үй желілерін стратегиялық даму модельдері бойынша жіктеуге және тұрақтылық, инновация және қызмет сапасы арасындағы байланысты негіздеуге ерекше назар аударылады.

Зерттеу нәтижесінде стратегиялық жоспарлауды, цифрлық басқаруды, ESG тәжірибелерін, ресурстық тиімділікті, әлеуметтік жауапкершілікті және тұрақтылық көрсеткіштерін бақылау жүйесін біріктіретін интегралды модель ұсынылды. Нәтижелер тұрақты дамуды ұзақ мерзімді позициялауды, ұйымдастырушылық икемділікті және қонақ үй менеджментінің заманауи стандарттарын енгізуді қамтитын кешенді басқару процесі ретінде қарастыруға мүмкіндік береді. *Зерттеудің практикалық маңыздылығы* қонақ үй желілерін дамыту стратегияларын әзірлеу, олардың бейімделуін, инвестициялық тартымдылығын арттыру және ұзақ мерзімді перспективада Қазақстанның туристік-қонақ үй қызметтері нарығындағы позициясын нығайту кезінде ұсынылған тәсілді қолдану мүмкіндігінен тұрады.

Түйін сөздер: қонақ үй желілері, тұрақты даму, стратегиялық басқару, ESG, цифрлық трансформация, қонақ үй секторы, Қазақстан, қонақжайлылық саласы

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СТРАТЕГИЧЕСКОЕ УПРАВЛЕНИЕ УСТОЙЧИВЫМ РАЗВИТИЕМ ГОСТИНИЧНЫХ СЕТЕЙ КАЗАХСТАНА

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Аннотация. В статье рассматриваются научно-методические и прикладные аспекты стратегического управления устойчивым развитием гостиничных

сетей Казахстана в условиях трансформации туристского рынка, усиления конкуренции, цифровизации сервисных процессов и роста значимости ESG-повестки. *Актуальность исследования* определяется необходимостью повышения конкурентоспособности гостиничных предприятий, адаптации их бизнес-моделей к современным требованиям устойчивого туризма, а также формирования управленческих механизмов, обеспечивающих баланс экономических, экологических и социальных результатов. *Цель статьи* заключается в разработке интегральной модели стратегического управления устойчивым развитием гостиничных сетей Казахстана. *Методологическую основу исследования* составили системный, сравнительный, институциональный и стратегический подходы, а также методы обобщения, классификации, анализа факторов внешней и внутренней среды и концептуального моделирования. В работе проанализированы основные тенденции развития гостиничного сектора Казахстана, выявлены ключевые факторы и барьеры устойчивого развития гостиничных сетей, определена роль цифровой трансформации, ESG-инструментов, кадрового потенциала и клиентского опыта в повышении эффективности управления. Особое внимание уделено классификации гостиничных сетей по стратегическим моделям развития и обоснованию взаимосвязи между устойчивостью, инновациями и качеством услуг. *В результате исследования* предложена интегральная модель, объединяющая стратегическое планирование, цифровое управление, ESG-практики, ресурсную эффективность, социальную ответственность и систему мониторинга показателей устойчивости. Полученные результаты позволяют рассматривать устойчивое развитие как комплексный управленческий процесс, включающий долгосрочное позиционирование, организационную гибкость и внедрение современных стандартов гостиничного менеджмента. *Практическая значимость исследования* состоит в возможности применения предложенного подхода при разработке стратегий развития гостиничных сетей, повышении их адаптивности, инвестиционной привлекательности и укреплении позиций Казахстана на рынке туристско-гостиничных услуг в долгосрочной перспективе.

Ключевые слова: гостиничные сети, устойчивое развитие, стратегическое управление, ESG, цифровая трансформация, гостиничный сектор, Казахстан, сфера гостеприимства

Introduction. In modern conditions, the hospitality industry is becoming one of the significant areas of development of the service economy, tourism and regional infrastructure. The hotel business is no longer limited to the function of temporary accommodation for tourists and business visitors. It increasingly acts as an element of the tourism ecosystem related to investments, employment, transport accessibility, digital services, small business development and the formation of the territory's image. For Kazakhstan, this issue is of particular relevance, since tourism

is considered as one of the promising areas of economic diversification, increasing the investment attractiveness of regions and developing non-resource sectors.

Hotel chains occupy a special place in the structure of the hospitality industry. Unlike individual independent hotels, network formats have broader opportunities for standardizing service, introducing digital technologies, brand management, conducting internal quality control and implementing long-term investment strategies. At the same time, hotel chains face a more complex system of management challenges, as they need to ensure uniform standards of service in different regions, take into account the specifics of local demand, manage human resources, reduce operating costs and at the same time meet modern requirements for sustainable development.

The relevance of the study is determined by the fact that the hotel sector in Kazakhstan is developing in the context of the growth of domestic tourism, increased investment activity and expansion of tourist infrastructure. According to the Bureau of National Statistics of the Republic of Kazakhstan, the activity of accommodation facilities is assessed through such indicators as the number of accommodation facilities, the number of visitors served, capacity, occupancy of rooms and the volume of services provided, which allows us to consider the hotel sector as an independent and measurable segment of the tourism economy (Bureau of National Statistics of the Republic of Kazakhstan, 2026). At the same time, industry materials indicate an increase in the number of accommodation facilities and an increase in the volume of services in the hotel sector, which confirms the industry's transition to a phase of post-pandemic recovery and structural expansion (TSPM, 2025; The Times of Central Asia, 2025).

However, the quantitative growth of the hotel infrastructure alone does not guarantee sustainable development. The expansion of the number of rooms, the construction of new facilities and the arrival of international brands may be accompanied by risks of seasonality, uneven workload, staff shortages, increased environmental burden and increased dependence on digital booking platforms. Therefore, the strategic management of hotel chains should be aimed not only at increasing profitability and utilization, but also at building long-term business sustainability. In this context, the ESG approach, digital transformation, human capital development, institutional partnership and integration of hotel chains into regional tourism clusters are of particular importance.

The theoretical basis of the research consists of the provisions of strategic management, the concept of sustainable development and the resource approach. The classical theory of competitive advantages emphasizes that a company's sustainability depends on its ability to form unique market positions and effectively use internal resources (Porter, 1985; Barney, 1991). For hotel chains, this means the need to combine market positioning, quality standardization, personnel management, digital analytics, and adaptation to regional specificities. However, in the modern service economy, the competitiveness of hotel chains is increasingly determined not only by price and location, but also by the quality of customer

experience, reputation, environmental responsibility and the social importance of the business.

The concept of sustainable development in the hotel business is closely related to the triple bottom line approach, which assumes simultaneous consideration of the economic, social and environmental results of the organization's activities (Elkington, 1997). In relation to hotel chains, this approach means that business efficiency should be assessed not only through profit and utilization, but also through the rational use of resources, working conditions, contribution to local communities, transparency of management and reduction of negative impact on the environment. In recent years, this logic has been developed in the ESG approach, which allows translating general principles of sustainability into a system of specific indicators and management decisions (UN Tourism, 2024).

For Kazakhstan, ESG-oriented management of hotel chains is of practical importance, since a significant part of the country's tourism potential is associated with natural, recreational and cultural territories. The development of hotel facilities in such zones should take into account not only commercial attractiveness, but also the environmental impact, accessibility of infrastructure, the interests of the local population and the preservation of natural capital. This is especially important for mountainous, lake, steppe and coastal areas, where uncontrolled development of tourist infrastructure can lead to a deterioration in the quality of the environment and reduce the long-term attractiveness of the destination.

Along with the ESG agenda, the most important factor in the development of hotel chains is digital transformation. Modern hotel operators use digital solutions not only for promotion and online booking, but also for demand management, dynamic pricing, review analysis, personalization of service and operational efficiency improvement. For Kazakhstan, the digitalization of the hotel sector is especially important due to the regional heterogeneity of the tourism market and the need to increase the availability of tourist information. Initiatives to develop the digital ecosystem of tourism are aimed at integrating planning, booking, accommodation and feedback services, which creates new opportunities for hotel chains (QazTourism, 2025).

Despite the growing interest in the development of tourism and the hotel business in Kazakhstan, a research gap remains in the scientific literature. Existing works more often consider certain aspects of the tourism industry: investments, government policy, statistics of accommodation facilities, legal regulation, digitalization or regional development. However, the complex problem of strategic management of the sustainable development of hotel chains remains insufficiently studied, where economic, ESG, digital, personnel and institutional factors are simultaneously taken into account. This determines the scientific significance of this study.

The purpose of the article is to develop a theoretical and applied approach to the strategic management of the sustainable development of hotel chains in Kazakhstan based on the integration of market, operational, ESG, digital, personnel and regional factors.

To achieve the purpose of the study, tasks were identified aimed at a comprehensive study of current trends and structural features of the development of the hotel sector in Kazakhstan in the context of the transformation of the tourism market, identifying key factors, institutional constraints and management barriers affecting the sustainable development of hotel chains, as well as determining the role of the ESG approach and digital transformation as tools to improve the effectiveness of strategic management.. Special attention is paid to the systematization of the main types of hotel chains in Kazakhstan, taking into account the applied strategic development models and the development of an integrated strategic management model for the sustainable development of hotel chains, focused on a combination of economic performance, environmental responsibility and social sustainability.

The object of the study is hotel chains and network accommodation formats operating in Kazakhstan. The subject of the study is management mechanisms that ensure the sustainable development of hotel chains in the context of growing tourist demand, digitalization, investment activity and increased requirements for environmental and social responsibility.

The scientific novelty of the study is that hotel chains in Kazakhstan are considered as complex socio-economic systems, the development of which depends not only on commercial efficiency, but also on the ability to integrate ESG principles, digital tools, personnel policy and regional partnership into a single strategic model. Unlike research focused primarily on the analysis of tourism statistics or individual aspects of the hotel business, this work offers a holistic framework for strategic management of the sustainable development of hotel chains.

The practical significance of the study lies in the possibility of using the proposed approaches by hotel operators, investors, regional tourism authorities and professional education organizations. For hotel chains, the research results can serve as a basis for developing sustainable development strategies, implementing ESG indicators, increasing digital maturity, and improving HR policies. For government agencies, the proposed model can be useful in developing programs to support tourism infrastructure, develop regional clusters, and evaluate the effectiveness of investment projects.

Thus, the study aims to substantiate the fact that the long-term competitiveness of hotel chains in Kazakhstan depends not only on the growth of tourist flow and investment, but also on the quality of strategic management. In the context of increased competition, digitalization, and increasing sustainability requirements, hotel chains must move from fragmented management of individual facilities to a system model that combines commercial performance, environmental responsibility, social sustainability, digital analytics, and regional partnerships.

Literature Review. The issue of strategic management for the sustainable development of hotel chains occupies an important place in contemporary academic discourse, since the hospitality industry simultaneously belongs to the service sector, tourism infrastructure, regional economy, and the broader system of natural resource consumption. Unlike earlier approaches, in which the hotel business was

assessed mainly through occupancy rates, profitability, and service quality, recent studies increasingly interpret the development of hotel chains through the lenses of sustainability, ESG principles, digital transformation, human capital management, and territorial development. From this perspective, a hotel chain is not merely a commercial entity, but also an institutional actor within the tourism ecosystem, influencing employment, investment attractiveness, environmental pressure, and the quality of regional services.

Within the theory of strategic management, hotel enterprises are viewed as organizations whose competitiveness depends on their ability to adapt to external changes, build sustainable competitive advantages, and maintain consistent service standards. Classical approaches to strategic management emphasize the role of long-term planning, competitive environment analysis, market positioning, and the effective use of organizational resources (Porter, 1985; Barney, 1991). These principles are particularly relevant to the hotel industry, as the accommodation market is highly sensitive to seasonality, fluctuations in tourist demand, changes in household income, transport accessibility, and reputational factors. Therefore, the strategic management of a hotel chain should take into account not only the company's internal resources, but also the specific characteristics of the destination, consumer behaviour, the development of digital sales channels, and the institutional support available to the sector.

In hospitality management research, sustainable development is commonly associated with the need to balance economic performance, social responsibility, and environmental safety. The triple bottom line concept proposed by J. Elkington has become one of the key theoretical foundations for studying sustainable business, as it implies the simultaneous assessment of a company's financial, social, and environmental outcomes (Elkington, 1997). In relation to hotel chains, this means that sustainability cannot be reduced solely to profit growth or expansion of room capacity. It should also include reduced energy consumption, rational water use, waste management, staff development, support for local suppliers, improved accessibility of services, and transparency in corporate governance.

In recent years, academic literature has paid increasing attention to the ESG approach in tourism and hospitality. ESG can be regarded as a more operational form of sustainable development, since it translates broad principles of environmental and social responsibility into a system of measurable indicators. According to UN Tourism, in 2024 work was initiated to promote a common ESG Framework for Tourism Businesses, aimed at improving the consistency of ESG practices across the tourism sector (UN Tourism, 2024). This is especially important for hotel chains, as network operators usually have the organizational and financial capacity to introduce energy efficiency standards, corporate reporting systems, internal control mechanisms, and sustainable procurement practices. Recent studies emphasize that ESG indicators are gradually becoming not only a component of corporate reputation, but also a factor of investment attractiveness, operational efficiency, and competitive positioning in the hotel industry (Back, 2024; Milovanović, 2025).

A particularly significant strand of the literature concerns the environmental sustainability of the hotel business. Hotels are resource-intensive facilities, as their operation involves the continuous consumption of electricity, water, heating, detergents, food products, and disposable materials. For this reason, researchers identify several key areas of environmental management in hospitality, including the introduction of energy-efficient equipment, reduction of water consumption, waste sorting and recycling, the phasing out of single-use plastics, the use of locally sourced products, and environmental certification. In hotel chains, such measures may have a stronger impact than in individual independent hotels, because they can be scaled through unified corporate standards. However, scholars note that environmental initiatives produce long-term results only when they are embedded in the business model, staff motivation system, and communication with guests, rather than being used merely as an image-building tool (Shin, 2026; Zhang, 2025).

The social dimension of sustainable development in hotel chains is primarily associated with human capital, employment quality, and interaction with local communities. In the hotel business, service quality directly depends on the qualifications, motivation, and engagement of employees. Therefore, the sustainable development of hotel chains is impossible without investment in staff training, the development of service-oriented competencies, language proficiency, digital skills, and a strong corporate culture of hospitality. Moreover, hotel chains can exert a considerable influence on local labour markets, especially in tourism-oriented regions where accommodation facilities often become major employers. In this regard, social sustainability includes not only working conditions within the company itself, but also the contribution of hotel chains to local employment, vocational education, and small business development.

The governance component of ESG in hotel chains covers transparency, internal control, procurement quality, anti-corruption procedures, service standardization, and corporate reporting. This dimension is particularly important for hotel chains because a network structure usually integrates several properties, management levels, suppliers, and sales channels. In the absence of unified standards, hotel chains may face uneven service quality, financial losses, reputational risks, and declining customer trust. The academic literature emphasizes that corporate governance in the hospitality industry should not be limited to cost control, but should also be linked to customer experience management, social responsibility, and sustainable supply chain practices (Lu, 2025; Back, 2024).

A separate strand of research focuses on the digital transformation of the hotel business. Digitalization has changed the nature of competition in the hospitality industry, as hotel choice is increasingly shaped by online visibility, ratings, reviews, booking speed, personalized offers, and the convenience of communication with customers. For hotel chains, digital technologies serve not only as marketing tools, but also as instruments of strategic management. CRM systems, online booking platforms, revenue management tools, BI analytics, mobile applications, and review analysis enable hotels to forecast demand, manage pricing, strengthen guest loyalty,

and reduce dependence on external platforms. At the same time, digitalization generates new risks, including dependence on online aggregators, increasing commission costs, the need for data protection, and the growing influence of online reputation.

International literature pays considerable attention to the relationship between hotel sustainability and consumer behaviour. Contemporary tourists increasingly consider environmental and social factors when choosing accommodation; however, their willingness to pay for sustainable services depends on income level, trust in a hotel's environmental claims, and the transparency of information provided. The Booking.com Sustainable Travel Report 2024 indicates that sustainable travel is becoming an important element of consumer behaviour, although travellers expect clearer information, practical solutions, and broader involvement of the entire industry rather than isolated initiatives by individual hotels (Booking.com, 2024). This means that hotel chains should not merely declare their commitment to sustainability, but should demonstrate it through concrete practices, including energy-efficient solutions, the reduction of excessive plastic use, locally sourced products, responsible resource consumption, and active engagement with local communities.

For Kazakhstan, the sustainable development of hotel chains is particularly relevant in the context of transforming tourism policy and the growing role of tourism as a sector of the national economy. The Concept for the Development of the Tourism Industry of the Republic of Kazakhstan for 2023–2029 identifies tourism as one of the promising areas for economic growth, regional development, and the improvement of the country's investment attractiveness (Government of the Republic of Kazakhstan, 2023). This policy document provides an institutional basis for developing tourism infrastructure, improving service quality, promoting national tourist destinations, and expanding both domestic and inbound tourism. In this context, hotel chains represent a key element in the implementation of tourism policy, as they provide the basic infrastructure required for tourist accommodation.

Official statistics also confirm that Kazakhstan's hotel sector is becoming an increasingly important object of analysis. The Bureau of National Statistics of the Republic of Kazakhstan publishes data on the activities of accommodation establishments, including the number of visitors served, indicators of domestic and inbound tourism, the number of accommodation facilities, and the volume of services provided. In 2026, the Bureau published materials on the activities of accommodation establishments for January–December 2025, which makes it possible to use official statistical data to assess current trends in the hotel market (Bureau of National Statistics of the Republic of Kazakhstan, 2026). These data are important for building the empirical basis of the study, since they allow the analysis to move beyond general statements about tourism development and focus on measurable parameters of hotel infrastructure.

Studies of Kazakhstan's hotel market show that the development of accommodation facilities is accompanied by a number of structural constraints. In

particular, research based on Booking.com data indicated that, despite growth in the number of accommodation facilities, Kazakhstan continued to face problems of low average occupancy and uneven service quality across certain regions (Abdirazakov et al., 2023). This confirms the need to shift from the quantitative expansion of hotel infrastructure toward the management of quality, demand, digital visibility, and sustainability. For hotel chains, this conclusion is especially important, as the network format makes it possible to standardize service, manage reputation, conduct internal quality audits, and use a unified digital sales platform.

Kazakhstani studies on tourism also emphasize the need for programmatic and institutional development of the sector. Research on tourism development benchmarking shows that the competitiveness of tourist destinations depends not only on natural and cultural resources, but also on governance quality, infrastructure, accessibility, promotion, and coordination among market participants (Kainazarova, 2024). This argument is directly relevant to hotel chains, since they cannot develop separately from transport infrastructure, tourist routes, food service facilities, event policy, and regional branding. Consequently, the strategic management of hotel chains should be embedded in a broader tourism cluster model.

Research on the legal and institutional foundations of tourism policy also makes an important contribution to understanding sustainable tourism development in Kazakhstan. These studies emphasize that the Concept for the Development of the Tourism Industry for 2023–2029 marked a new stage in state tourism policy, aimed at improving sectoral governance, developing infrastructure, and creating conditions for the growth of tourism activity (Turyzbek, 2025). For hotel chains, the legal and institutional environment is of fundamental importance, since investment in hotel facilities requires long-term predictability, clear quality requirements, infrastructure support, and coordinated interaction among the state, business, and regions.

At the same time, the literature review shows that the topic of strategic management for the sustainable development of hotel chains in Kazakhstan has not yet been sufficiently examined in an integrated manner. Existing studies tend to address separate aspects, such as tourism policy, investment, digitalization, hotel occupancy, the legal foundations of tourism, or general issues of sustainable development. However, the relationship between the strategic management of hotel chains, the ESG approach, digital transformation, human resource policy, and the regional tourism ecosystem remains underexplored. This research gap determines the scientific relevance of the present article.

Thus, the literature review allows several general conclusions to be drawn. First, the sustainable development of hotel chains should be considered as a complex managerial category that integrates economic, environmental, social, digital, and institutional parameters. Second, the ESG approach is becoming an important instrument for operationalizing sustainability in the hospitality industry, as it enables the measurement and comparison of hotel companies' performance. Third, digital transformation strengthens the competitiveness of hotel chains, but requires the

development of analytics, direct sales channels, and online reputation management. Fourth, in the case of Kazakhstan, the regional dimension is particularly important, since hotel chains need to be integrated into tourism clusters and contribute to territorial development. Fifth, further research should focus on developing applied strategic management models that would enable hotel chains in Kazakhstan to combine commercial efficiency with the principles of sustainable development.

Materials and Methods. The methodological foundation of this study is based on a systemic approach to the analysis of strategic management for the sustainable development of hotel chains. Within this framework, a hotel chain is considered not only as a group of accommodation facilities aimed at achieving commercial results, but also as an element of the tourism ecosystem linked to regional development, employment, investment activity, digitalization, environmental pressure, and the quality of service infrastructure. This approach makes it possible to examine the sustainable development of the hotel business through the interaction of economic, social, environmental, and managerial factors.

The information base of the study consists of statistical, analytical, and regulatory-strategic materials reflecting the development of tourism and the hotel sector in Kazakhstan. The main sources include data from the Bureau of National Statistics of the Republic of Kazakhstan on tourism statistics and accommodation services, materials of the Ministry of Tourism and Sports of the Republic of Kazakhstan, sectoral publications by QazTourism, analytical reviews on investment in tourism infrastructure, and international approaches to sustainable development in the hospitality industry. The use of official statistical data made it possible to identify quantitative trends in the hotel sector, including the dynamics of accommodation facilities, the volume of services provided, room capacity, and regional differences in tourism infrastructure development (Bureau of National Statistics of the Republic of Kazakhstan, 2026; Ministry of Tourism and Sports of the Republic of Kazakhstan, 2025; QazTourism, 2025).

The object of the study is hotel chains and network-based accommodation formats operating in the territory of the Republic of Kazakhstan. The subject of the study is the set of managerial mechanisms that ensure the sustainable development of hotel chains under conditions of growing tourist demand, digital transformation, increasing investment activity, and the rising importance of the ESG agenda. Particular attention is paid to how hotel chains can integrate sustainability principles into strategic planning, operational management, human resource policy, digital services, and interaction with the regional tourism ecosystem.

The study covers the period from 2020 to 2025. This period was selected because, during these years, Kazakhstan's hotel sector passed through the stages of post-pandemic recovery, subsequent growth in domestic tourism, activation of investment projects, and gradual transition toward digital mechanisms for promotion and service management. Where necessary, selected data from earlier years were also used for comparative analysis in order to identify structural changes and long-term trends in hotel infrastructure development.

The research methodology included several interrelated stages. At the first stage, statistical data characterizing the development of Kazakhstan's hotel sector were analysed. The study examined indicators such as the number of accommodation facilities, the volume of services provided, room capacity, tourist flows, and investment activity. This stage made it possible to identify general market trends and assess the importance of the hotel sector for the national and regional economy.

At the second stage, comparative analysis was applied to identify differences between the main types of hotel chains. The study distinguished international hotel chains, national network operators, regional hotel chains, resort and recreational hotel complexes, and digitally oriented accommodation formats. The comparison was conducted according to such criteria as target market, competitive advantages, degree of service standardization, digital maturity, investment potential, and resilience to seasonal fluctuations in demand.

At the third stage, structural-functional analysis was used. This method made it possible to consider a hotel chain as a management system consisting of several functional blocks: strategic planning, operational efficiency, human resource management, digital transformation, ESG management, and institutional cooperation. This approach helped determine which functions are essential for ensuring the sustainable development of hotel chains and which managerial decisions should be embedded at the strategic level.

At the fourth stage, the ESG approach was applied, enabling the assessment of hotel chain sustainability through three groups of factors: environmental, social, and governance-related. The environmental block included indicators related to energy consumption, water use, waste management, and the introduction of resource-saving technologies. The social block covered staff training, local employment, occupational safety, service accessibility, and guest satisfaction. The governance block included procurement transparency, internal control, quality standardization, anti-corruption procedures, and corporate reporting.

Table 1 — Methodological Blocks of the Study

Methodological block	Content of analysis	Expected result
Statistical analysis	Examination of the dynamics of accommodation facilities, service volume, room capacity, and tourist flows	Identification of quantitative trends in the hotel sector
Comparative analysis	Comparison of international, national, regional, and resort hotel chains	Identification of differences in development strategies
Structural-functional analysis	Consideration of a hotel chain as a management system	Determination of key functions of strategic management
ESG analysis	Assessment of environmental, social, and governance factors of sustainability	Formation of a system of sustainable development indicators
Digital analysis	Examination of the role of CRM, online booking, revenue management, and review management	Assessment of the impact of digitalization on competitiveness
Cluster approach	Analysis of interaction between hotel chains, regions, tour operators, and service infrastructure	Determination of the role of hotel chains in the tourism ecosystem
Source: compiled by the author.		

To assess strategic management for the sustainable development of hotel chains, a system of analytical criteria was developed. It includes six groups of indicators: market, financial-operational, environmental, social, digital, and institutional. This set of criteria allows sustainability to be considered not as a separate area of corporate responsibility, but as an integrated managerial outcome.

Table 2 — Criteria for Assessing the Sustainable Development of Hotel Chains

Group of criteria	Main indicators	Relevance to the study
Market criteria	Room occupancy, guest structure, length of stay, share of repeat customers	Assessment of demand stability
Financial and operational criteria	ADR, RevPAR, operating margin, cost per room, revenue from additional services	Assessment of management efficiency
Environmental criteria	Water consumption, energy consumption, waste, sustainable procurement	Assessment of environmental sustainability
Social criteria	Local employment, staff training, employee turnover, guest satisfaction	Assessment of social contribution
Digital criteria	Share of online bookings, share of direct sales, review ratings, CRM use	Assessment of digital maturity
Institutional criteria	Partnerships with tour operators, participation in tourism routes, regional cooperation	Assessment of integration into the tourism ecosystem
<i>Source: compiled by the author.</i>		

The study also employed the method of strategic typologization. Its application made it possible to group hotel chains in Kazakhstan according to their development patterns and managerial priorities. As a result, four basic models were identified: the corporate-network model, the regionally adaptive model, the resort-recreational model, and the digital-service model. Each model has its own advantages, limitations, and strategic objectives. For example, the corporate-network model is characterized by a high level of standardization and brand recognition, but requires substantial investment and stable demand. The regionally adaptive model is more flexible, but is often constrained by weak infrastructure and seasonality. The resort-recreational model depends on natural resources and environmental carrying capacity, while the digital-service model requires advanced online channels, reputation management, and data analytics.

An important element of the methodology was the construction of an integrated model of strategic management for the sustainable development of hotel chains. This model was developed on the basis of a combination of theoretical approaches to sustainability, analysis of current trends in Kazakhstan's hotel market, and identification of managerial barriers. The model includes the following blocks: market positioning, operational efficiency, ESG management, digital transformation, human capital development, and institutional partnership.

Table 3 — Logic of Constructing the Integrated Research Model

Stage	Content	Methodological result
1. Analysis of the external environment	Examination of tourist demand, investment, regional characteristics, and digitalization	Identification of factors influencing the development of hotel chains
2. Analysis of the internal environment	Assessment of staff management, service, costs, quality, and digital tools	Identification of internal resources for sustainability
3. ESG assessment	Analysis of environmental, social, and governance parameters	Formation of sustainable development indicators
4. Etymologization of hotel chains	Grouping of hotel chains according to development models	Determination of strategic priorities
5. Development of the management model	Integration of market, digital, ESG, and institutional factors	Formation of a comprehensive sustainable development model
<i>Source: compiled by the author.</i>		

Methodologically, the study has an applied analytical character. It is not limited to describing the current state of the hotel sector, but is aimed at identifying managerial mechanisms that can be used by hotel chains in Kazakhstan when developing sustainable development strategies. Therefore, particular importance is attached not only to the analysis of quantitative indicators, but also to their interpretation from the perspective of strategic management.

To systematize the results, a “factor–risk–managerial decision” matrix was used. This tool made it possible to link external and internal challenges facing the hotel business with specific strategic actions. For instance, demand seasonality was associated with the need to develop the MICE segment, event tourism, and wellness services; staff shortages were linked to corporate training and partnerships with universities; environmental pressure was associated with the implementation of resource-saving technologies; and dependence on online platforms was linked to the development of direct sales channels and proprietary CRM systems.

Table 4 — Matrix for Analysing Managerial Decisions

Development factor	Possible risk	Managerial decision
Growth of tourist demand	Overloaded infrastructure and declining service quality	Standardization of processes and flow management
Increase in investment	Excessive construction without demand assessment	Preliminary strategic planning and payback analysis
Seasonality	Revenue instability	Development of business, event, and wellness tourism
Digitalization	Dependence on external platforms	Development of direct sales channels and CRM systems
ESG agenda	Growth of operational requirements and costs	Implementation of resource-saving technologies and ESG reporting
Staff shortage Decline in service quality Staff training and development of corporate culture		
<i>Source: compiled by the author.</i>		

Several limitations of the study should be noted. Available statistical data do not always allow for a detailed analysis of individual hotel chains, since official statistics usually aggregate indicators by types of accommodation facilities, regions, and service categories. In addition, ESG reporting indicators in Kazakhstan’s hotel sector are not yet widely standardized, which complicates the quantitative comparison of hotel operators in terms of environmental and social parameters. For this reason, the study relies on a combination of statistical analysis, expert interpretation, strategic etymology, and modelling of managerial decisions.

Thus, the selected methodology makes it possible to provide a comprehensive assessment of the sustainable development of hotel chains in Kazakhstan through the interrelation of market, investment, digital, environmental, social, and institutional factors. This approach allows not only the current state of the hotel sector to be described, but also a practice-oriented model of strategic management to be proposed. Such a model can be applied by hotel chains, regional operators, investors, and public authorities responsible for tourism development.

Results. The analysis made it possible to establish that the sustainable development of hotel chains in Kazakhstan is shaped by a combination of market, investment, digital, environmental, and institutional factors. While the traditional model of hotel business assessment was mainly focused on room occupancy, service volume, and profitability, contemporary conditions require a broader approach to strategic management. A hotel chain should be viewed as an element of the tourism ecosystem that influences employment, regional development, the quality-of-service infrastructure, environmental pressure, and the investment attractiveness of a territory.

The first result of the study is the identification of a positive development trend in Kazakhstan’s hotel sector. The increase in the number of accommodation facilities and the growing volume of services provided indicate that the hotel market is gradually moving from the post-pandemic recovery stage to a phase of structural expansion. However, this development remains uneven. Large cities concentrate business and MICE tourism, whereas regions with natural and recreational potential develop mainly through domestic tourism, resort-based recreation, and event-related activities.

Table 5 — Main Development Trends in Kazakhstan’s Hotel Sector

Area of analysis	Identified trend	Significance for strategic management
Accommodation infrastructure	Growth in the number of hotels, guest houses, recreation centres, and other accommodation facilities	Stronger competition and the need to differentiate the hotel product
Volume of services	Increase in revenues of accommodation facilities	Growing importance of revenue management and occupancy control
Regional development	Expansion of tourism facilities beyond major cities	Need to adapt strategies to regional specificities
Investment	Growth of investment in tourism and hotel infrastructure	Transition toward long-term investment strategies
Digitalization	Expansion of online booking, CRM, and digital promotion	Integration of demand analytics and customer experience management
ESG agenda	Increasing requirements for environmental and social responsibility	Inclusion of ESG indicators in strategic management systems
<i>Source: compiled by the author based on data from the Bureau of National Statistics of the Republic of Kazakhstan, QazTourism, and sectoral analytical materials (Bureau of National Statistics of the Republic of Kazakhstan, 2026; QazTourism, 2025).</i>		

The second result is the identification of strategic heterogeneity among hotel chains. Hotel chains in Kazakhstan cannot be treated as a homogeneous group, since they differ in scale of operation, target segment, level of standardization, digital maturity, and dependence on regional infrastructure. International hotel brands are mainly oriented toward business, inbound, and MICE tourism; national and regional chains focus primarily on domestic tourism and business travel; while resort complexes depend largely on seasonal recreational demand.

Table 6 — Strategic Types of Hotel Chains in Kazakhstan

Type of hotel chain	Main market	Key competitive advantage	Main managerial problem
International hotel chains	Business, inbound, and MICE tourism	Brand recognition, quality standards, customer trust	High operating costs
National hotel chains	Domestic and business tourism	Knowledge of the local market and adaptability	Limited access to long-term capital
Regional hotel chains	Business trips, domestic tourism, local events	Proximity to regional demand	Seasonality and unstable occupancy
Resort hotel complexes	Family, recreational, and wellness tourism	Natural resources and uniqueness of location	Environmental pressure and seasonal dependence
Digitally oriented operators	Online segment and independent travellers	Flexibility and digital sales channels	Dependence on platforms and reviews
Source: compiled by the author.			

The third result of the study is the identification of investment as one of the key drivers of sustainable development in hotel chains. Growth in investment in tourism infrastructure creates conditions for the emergence of new hotel facilities, improvement in service quality, and attraction of international brands. At the same time, investment expansion should be accompanied by strategic planning. The construction of new facilities without assessing demand, seasonality, transport accessibility, and environmental pressure may reduce the efficiency of capital investment.

Table 7 — Impact of Investment Growth on the Sustainable Development of Hotel Chains

Element of investment growth	Opportunity for hotel chains	Potential risk	Managerial decision
Construction of new hotels	Expansion of room capacity and increased tourism attractiveness	Risk of low occupancy under insufficient demand	Preliminary market analysis and customer segmentation
Entry of international brands	Improvement in service quality and destination recognition	Stronger competition for local hotels	Improvement of standards and development of niche offers
Development of resort areas	Growth of domestic and inbound tourism	Increased environmental pressure	Introduction of environmental standards
Development of roadside services	Improved regional accessibility	Uneven service quality	Network standardization and quality control
State support	Reduction of investment barriers	Dependence on budgetary and administrative decisions	Diversification of funding sources
Source: compiled by the author based on sectoral materials (Qazinform, 2026; Ministry of Tourism and Sports of the Republic of Kazakhstan, 2025).			

The fourth result is the confirmation of the key role of digital transformation. For hotel chains, digitalization is not only a sales tool, but also a mechanism of strategic management. Online booking, CRM systems, review analytics, BI dashboards, and revenue management enable hotel operators to forecast demand more accurately, manage prices, retain customers, and improve operational efficiency. The development of direct sales channels is becoming especially important, since excessive dependence on external booking platforms reduces the profitability of the hotel business.

Table 8 — Digital Tools for Strategic Management of Hotel Chains

Digital tool	Main function	Expected managerial effect
CRM system	Collection and analysis of customer data	Increase in repeat sales and loyalty
Online booking	Direct sales and integration with platforms	Increase in room occupancy
Revenue management	Dynamic price management	Growth in revenue per room
Review analytics	Assessment of guest satisfaction	Improvement in service quality
BI dashboards	Monitoring of financial and operational indicators	More accurate managerial planning
Mobile services	Simplification of communication with guests	Higher personalization of service

Source: compiled by the author based on digital management approaches in tourism (QazTourism, 2025).

The fifth result is the justification for incorporating ESG indicators into the strategic management of hotel chains. For Kazakhstan, this issue is of particular importance, since promising tourist zones are often located in environmentally sensitive areas, including mountain, lake, steppe, and coastal regions. Under these conditions, the development of hotel infrastructure should take into account not only commercial efficiency, but also its impact on natural resources, local communities, and the long-term sustainability of the territory.

Table 9 — ESG Indicators of Sustainable Development in Hotel Chains

ESG component	Indicators	Significance for the hotel business
Environmental	Electricity consumption per room, water consumption per guest, share of recycled waste, use of energy-efficient equipment	Reduction of costs and environmental pressure
Social	Share of local employees, staff training, occupational safety, accessibility of services, guest satisfaction	Improvement of service quality and social sustainability
Governance	Procurement transparency, internal control standards, anti-corruption procedures, corporate reporting	Risk reduction and increased investor confidence
Digital sustainability	CRM, occupancy analytics, review management, digital sales channels	Increased efficiency and manageability of the chain
Regional impact	Procurement from local suppliers, participation in regional tourism routes, support for local initiatives	Stronger connection between the hotel chain and the territory

Source: compiled by the author.

The sixth result is the identification of the relationship between hotel chain development and the regional economy. Hotel chains generate a multiplier effect, since their activities are linked to transport, food services, trade, excursion services, cultural sites, local suppliers, and the labour market. However, a positive regional effect emerges only when the hotel business is integrated into the local tourism ecosystem rather than operating as an isolated commercial facility.

Table 10 — Contribution of Hotel Chains to the Sustainable Development of Kazakhstan's Regions

Area of impact	Manifestation of the effect	Assessment indicators
Economic development	Growth in income from tourism and related services	Volume of accommodation services, tax revenues, investment
Employment	Job creation in the hotel and service sectors	Number of employees, share of local staff
Small business	Procurement from local suppliers and development of related services	Share of local procurement, number of partners
Tourism attractiveness	Improvement of infrastructure and service quality	Number of tourists, average length of stay
Social sustainability	Staff training and improvement of service standards	Training hours, employee turnover, guest satisfaction
Environmental sustainability Reduced pressure on natural resources Water and energy consumption, waste volume		
<i>Source: compiled by the author.</i>		

The seventh result is the identification of the main barriers to the sustainable development of hotel chains. Despite the positive dynamics of the industry, Kazakhstan's hotel sector faces several systemic constraints. These include demand seasonality, a shortage of qualified personnel, insufficient ESG maturity, dependence on external digital platforms, uneven regional infrastructure, and weak standardization of quality in certain market segments.

Table 11 — Main Barriers to the Sustainable Development of Hotel Chains in Kazakhstan

Barrier	Manifestation	Consequence	Possible managerial decision
Demand seasonality	High occupancy during peak periods and decline in the off-season	Revenue instability	Development of MICE, wellness, event, and business tourism
Staff shortage	Lack of qualified personnel	Decline in service quality	Corporate training and partnerships with universities
Regional unevenness	Differences in infrastructure and transport accessibility	Limited growth in certain regions	Cluster development and public-private partnership
Low ESG maturity	Absence of measurable environmental and social indicators	Reduced investment attractiveness	ESG reporting and internal sustainability standards
Digital dependence	Strong role of external booking platforms	Loss of part of the margin	Development of direct sales and proprietary CRM systems
Insufficient standardization	Different quality levels across facilities within the same chain	Loss of customer trust	Unified service standards and internal audit
<i>Source: compiled by the author.</i>			

The eighth result of the study is the development of an integrated model of strategic management for the sustainable development of hotel chains. The model combines six blocks: market positioning, operational efficiency, ESG management, digital transformation, human capital development, and institutional partnership. These blocks should not be considered separately, but as an interconnected system, since weakness in one area reduces the sustainability of the entire hotel chain.

Table 12 — Integrated Model of Strategic Management for the Sustainable Development of Hotel Chains

Model block	Content	Key indicators	Expected result
Market positioning	Selection of target segments: business tourism, domestic tourism, MICE, resort recreation	Occupancy, guest structure, average length of stay	Increased demand stability
Operational efficiency	Management of costs, procurement, room capacity, and services	RevPAR, ADR, operating margin, cost per room	Growth in financial performance
ESG management	Environmental, social, and governance standards	Energy consumption, water consumption, employee turnover, local procurement	Increased sustainability and investment attractiveness
Digital transformation	CRM, online sales, analytics, review management	Share of direct sales, review rating, repeat bookings	Higher loyalty and profitability
Human capital	Training, motivation, and retention of personnel	Training hours, employee turnover, staff satisfaction	Improvement in service quality
Institutional partnership	Cooperation with the state, regions, universities, and tour operators	Number of partnerships, participation in routes, joint projects	Integration into the regional tourism ecosystem
<i>Source: compiled by the author.</i>			

The ninth result is the formation of a strategic decision matrix for hotel chains in Kazakhstan. It shows which managerial actions should be implemented depending on the identified development factors and risks.

Table 13 — Strategic Decision Matrix for Hotel Chains in Kazakhstan

Development factor	Risk	Strategic decision	Expected effect
Growth of domestic tourism	Seasonal fluctuations in demand	Development of package offers, event tourism, and family tourism	More balanced occupancy
Increase in business travel	Concentration of demand in major cities	Development of MICE infrastructure in regions	Expansion of business tourism
Entry of international brands	Pressure on local chains	Improvement of service standards and development of a national brand	Increased competitiveness
Digitalization of sales	Dependence on aggregators	Development of direct booking and loyalty programmes	Reduction of commission costs
Growth of environmental requirements	Increase in modernization costs	Gradual introduction of energy-efficient solutions	Reduction of long-term costs
Staff shortage	Instability of service quality	Corporate training and motivation system	Improvement in service quality
Regional fragmentation Weak integration into tourism routes Cluster cooperation with tour operators and regions Increase in tourist flow			
<i>Source: compiled by the author</i>			

The tenth result is the identification of priority areas for strategic management. The most significant priorities for hotel chains in Kazakhstan include improving service quality, developing digital analytics, introducing ESG indicators, diversifying demand, training personnel, and strengthening cooperation with regional tourism clusters. These areas should be incorporated into the medium- and long-term strategies of hotel operators.

Table 14 — Priority Areas for the Sustainable Development of Hotel Chains in Kazakhstan

Priority	Content	Practical significance
Improvement of service quality	Introduction of unified service standards and internal audits	Strengthening guest trust and increasing repeat visits
Digital analytics	Use of data on bookings, reviews, prices, and seasonality	Greater accuracy of managerial decisions
ESG integration	Inclusion of environmental and social indicators in strategy	Increased investment attractiveness
Demand diversification	Development of MICE, wellness, family, business, and event tourism	Reduced dependence on seasonality
Staff development	Training, motivation, and retention of personnel	Greater stability of service quality
Regional partnership	Participation in tourism routes, clusters, and local projects	Strengthening the role of hotel chains in the regional economy
<i>Source: compiled by the author.</i>		

Thus, the results of the study confirm that the sustainable development of hotel chains in Kazakhstan depends not only on the growth of tourist demand and investment, but also on the ability of hotel operators to introduce modern strategic management tools. The most promising approach is a model in which a hotel chain is considered as a complex system combining commercial efficiency, ESG principles, digital transformation, human capital development, and participation in the regional tourism ecosystem.

Discussion. The findings indicate that strategic management of the sustainable development of hotel chains in Kazakhstan should be understood as a comprehensive process that goes beyond the boundaries of traditional hotel management. In earlier approaches, the development of the hotel business was mainly associated with the expansion of room capacity, higher occupancy rates, and growth in the volume of services provided. In contemporary conditions, however, these indicators are no longer sufficient for assessing long-term sustainability. A hotel chain is becoming part of a broader tourism ecosystem, where its competitiveness depends on service quality, digital maturity, environmental responsibility, human capital, institutional cooperation, and the ability to generate a sustainable regional effect.

The results of the study are consistent with the main assumptions of strategic management theory, according to which sustainable competitive advantage is formed not only through external positioning, but also through internal resources,

organizational capabilities, and the quality of managerial decisions (Porter, 1985; Barney, 1991). For hotel chains in Kazakhstan, this is particularly important because the growth of tourist demand and investment alone does not automatically guarantee sustainable development. The expansion of hotel infrastructure may contribute to the attractiveness of tourist regions, but it may also intensify competition, reduce occupancy in certain facilities, and increase environmental pressure. Therefore, strategic management should be based not only on market expansion, but also on the assessment of long-term efficiency, seasonality, demand quality, and the sustainability of the business model.

The identified heterogeneity of Kazakhstan's hotel market is especially important. International hotel chains, national operators, regional hotels, resort complexes, and digitally oriented accommodation formats have different strategic objectives. International brands benefit from strong recognition, quality standards, and access to corporate clients; however, they face high operating costs and dependence on business tourism. Regional hotel chains are better adapted to local demand, but they are often constrained by weak infrastructure, seasonality, and limited access to long-term capital. Resort hotel complexes have significant development potential, but they are more exposed to environmental and climate-related constraints. This means that a single universal strategy for all hotel chains in Kazakhstan is not feasible. Instead, a differentiated approach is required, taking into account the type of facility, region, target segment, and level of digital maturity.

A significant conclusion of the study is that the sustainable development of hotel chains should be closely linked to the ESG approach. In the academic literature, sustainability is often interpreted through the triple bottom line concept, which assumes a balance between economic, social, and environmental outcomes (Elkington, 1997). However, for the practical management of hotel chains, the ESG approach appears more applicable, as it translates sustainability principles into a system of measurable indicators. For Kazakhstan, this is particularly relevant because a substantial part of the country's tourism potential is connected with natural landscapes, mountain areas, lakes, national parks, cultural heritage, and recreational resources. Under these conditions, the hotel business cannot develop solely according to the logic of commercial territorial expansion. It must take into account the carrying capacity of natural resources, water and energy consumption, waste management, local employment, and the preservation of regional cultural identity.

At the same time, the implementation of the ESG approach in Kazakhstan's hotel chains faces several limitations. First, regular ESG reporting is not yet widespread in the sector. Second, small and medium-sized hotel operators often lack the financial and organizational resources required to introduce comprehensive environmental standards. Third, there is no unified system of sector-specific indicators that would make it possible to compare hotel facilities by their level of sustainability. For this reason, ESG integration at the initial stage should be applied gradually and pragmatically. The most realistic areas include energy-efficient lighting, water-

saving systems, reduction of single-use plastics, waste sorting, staff training, local procurement, and the introduction of internal quality standards. Such measures do not require a complete and immediate transformation of the business model, but they allow hotel chains to gradually develop a sustainability-oriented corporate culture.

The results also show that digital transformation is one of the key factors strengthening the sustainability of hotel chains. In contemporary conditions, digitalization is no longer merely a marketing instrument. It has become a mechanism for managing demand, revenue, service quality, and customer experience. CRM systems, online booking, review analytics, dynamic pricing, and BI dashboards allow hotel chains to respond more quickly to changes in demand, forecast occupancy more accurately, and personalize services. For Kazakhstan, where the tourism market is characterized by seasonality and regional unevenness, digital tools can become an important means of reducing uncertainty.

However, digitalization also creates new challenges. A high dependence of accommodation facilities on international aggregators and booking platforms may reduce profitability and limit direct contact with customers. In addition, online reputation is becoming an independent factor of competitiveness. Negative reviews, slow responses to complaints, and the absence of systematic customer experience management can quickly weaken a hotel's market position. Therefore, hotel chains in Kazakhstan should develop not only their presence on external platforms, but also their own digital channels, including direct booking websites, loyalty programmes, CRM databases, mobile services, and feedback analytics. This approach would reduce dependence on intermediaries and improve the manageability of customer relations.

The human capital factor also deserves special attention. The study confirms that human capital is one of the most vulnerable elements in the sustainable development of hotel chains. In the hotel business, service quality is created directly through interaction between employees and guests. Therefore, even modern buildings, advanced equipment, and digital systems cannot ensure high customer satisfaction if staff training remains insufficient. For Kazakhstan, this issue is particularly significant in the regions, where tourism infrastructure is developing faster than the system of professional training for the hospitality industry.

In this regard, strategic management of hotel chains should include a systematic human resource policy. Such a policy should cover professional training, service standards, language training, digital skills, staff motivation, and the reduction of employee turnover. Partnerships between hotel chains and universities, colleges, and vocational training centres represent a promising direction. Such cooperation can support the development of practice-oriented educational programmes, internships, improved professional training, and a narrower gap between business needs and graduate competencies.

The results further demonstrate that hotel chains can play an important role in the sustainable development of regions. Their impact is not limited to tourist

accommodation. Hotels generate demand for food services, transport, excursion services, trade, local products, cultural events, and service companies. In this sense, a hotel chain may act as a core element or an important component of a tourism cluster. However, this effect arises only when the hotel business is integrated into the regional economy. If a hotel facility operates in isolation, relies mainly on external suppliers, and does not interact with local tourism routes, its contribution to territorial development remains limited.

For Kazakhstan, the cluster model of hotel chain development appears to be the most promising. This model implies cooperation between hotels, local executive bodies, tour operators, transport companies, restaurants, cultural institutions, natural parks, educational organizations, and small businesses. Such a model can increase the average length of tourist stays, expand the range of services, raise employment, and strengthen the regional brand. It is especially relevant for Almaty, Akmola, Turkestan, East Kazakhstan, and Mangystau regions, where tourism development depends on the interaction of natural, cultural, transport, and service-related factors.

Investment growth in Kazakhstan's tourism and hotel sector should be assessed cautiously. On the one hand, it creates opportunities for infrastructure modernization, the attraction of international brands, the development of resort areas, and improvement in service quality. On the other hand, without strategic analysis there is a risk of excessive construction, uneven distribution of investment, and low payback of facilities. Therefore, investment decisions in the hotel sector should be based on an assessment of tourist demand, transport accessibility, seasonality, environmental pressure, human resource availability, and regional development prospects. Otherwise, the expansion of room capacity may fail to produce a sustainable economic outcome.

The findings suggest that strategic management of the sustainable development of hotel chains should be based on an integrated model comprising six interrelated blocks: market positioning, operational efficiency, ESG management, digital transformation, human capital, and institutional partnership. Each of these blocks has independent significance, but the greatest effect is achieved when they are applied together. For example, digitalization without staff training will not ensure high service quality; ESG initiatives without managerial reporting will remain declarative; investment without demand analysis may lead to inefficient capital use; and regional partnership without service standards will not create a stable tourist flow.

The practical significance of the proposed model lies in its applicability for hotel chains in Kazakhstan when developing medium- and long-term strategies. For large international and national chains, the model can help strengthen the ESG component, develop digital analytics, and improve property management efficiency. For regional hotel operators, it may serve as a tool for improving service quality, reducing seasonality, and integrating into tourism routes. For resort complexes, the model is important in terms of environmental responsibility, visitor flow management, and interaction with local communities. For public authorities, it may

be useful in designing tourism infrastructure support programmes and assessing the effectiveness of investment projects.

The scientific significance of the study consists in broadening the analytical approach to hotel chains in Kazakhstan. Existing literature often examines separate aspects of tourism development, including investment, state policy, digitalization, legal regulation, or accommodation statistics. In this study, hotel chains are analysed as complex socio-economic systems in which sustainable development depends on the simultaneous management of market, environmental, social, digital, and institutional parameters. This makes it possible to connect strategic management theory, the concept of sustainable development, the ESG approach, and regional economics within a single analytical framework.

At the same time, the study has certain limitations. First, official statistics do not always allow for a detailed analysis of indicators for individual hotel chains, as data are usually presented in aggregated form by region and type of accommodation facility. Second, open information on ESG practices among hotel operators in Kazakhstan remains limited, which complicates quantitative comparison between companies. Third, the digital maturity of hotel chains may vary significantly, but relevant data are not always available from public sources. Therefore, further research may focus on conducting empirical surveys of hotel operators, constructing a sustainability index for hotel chains, and developing a methodology for the quantitative assessment of ESG maturity in the sector.

A promising direction for future research is the development of an integrated sustainable development index for hotel chains in Kazakhstan. Such an index may include financial and operational indicators, digital maturity, environmental parameters, social indicators, human resource sustainability, and the level of regional integration. Its application would make it possible to conduct comparative analysis of hotel chains, identify best practices, and formulate recommendations for both business and public policy. Another important research direction is the assessment of the impact of hotel chains on the development of tourism clusters, especially in regions with high natural and recreational potential.

Thus, the discussion of the results confirms that the sustainable development of hotel chains in Kazakhstan is possible only through a transition from fragmented management of individual facilities to a systemic strategic model. This model should combine commercial efficiency, ESG principles, digital analytics, human capital development, and institutional cooperation with regions. In the context of growing tourism activity and increasing investment interest, comprehensive strategic management becomes the main condition for the long-term competitiveness of hotel chains in Kazakhstan.

Conclusion. The study has established that strategic management of the sustainable development of hotel chains in Kazakhstan should be understood as a comprehensive system integrating economic, environmental, social, digital, and institutional parameters. In contemporary conditions, a hotel chain can no longer be assessed only through room occupancy, the volume of services provided, and

financial profitability. Its sustainability is determined by its ability to ensure stable service quality, use resources efficiently, adapt to changes in tourist demand, introduce digital technologies, develop human capital, and participate in the formation of a regional tourism ecosystem.

The results show that Kazakhstan's hotel sector is currently undergoing structural expansion. The growth in the number of accommodation facilities, the increase in the volume of services, and the intensification of investment projects create favourable conditions for the development of hotel chains. At the same time, quantitative growth alone does not guarantee the long-term sustainability of the sector. Without strategic planning, the industry may face stronger risks related to seasonality, uneven occupancy, excessive construction, staff shortages, weak service standardization, and environmental pressure on tourist destinations.

One of the key conclusions of the study is the need for hotel chains in Kazakhstan to move from fragmented management of individual facilities toward an integrated model of strategic management. Such a model should include six interrelated blocks: market positioning, operational efficiency, ESG management, digital transformation, human capital development, and institutional partnership. The combined implementation of these areas enables hotel chains to build sustainable competitive advantages while also contributing to the development of the regional economy.

The ESG approach is of particular importance, as it allows the principles of sustainable development to be translated into a system of measurable managerial indicators. For hotel chains in Kazakhstan, this means the need to monitor energy consumption, water use, waste management, working conditions, staff training, procurement transparency, internal control quality, and interaction with local communities. ESG integration should not be treated as an additional reputational measure, but as an element of long-term strategy that affects investment attractiveness, reduces operational risks, and strengthens trust among customers, partners, and public authorities.

Digital transformation is also a crucial condition for the sustainable development of hotel chains. The use of CRM systems, online booking, review analytics, dynamic pricing, and BI tools enables hotel operators to improve the accuracy of managerial decisions, forecast demand, manage occupancy, and strengthen guest loyalty. At the same time, special attention should be paid to the development of direct sales channels and proprietary digital platforms, since excessive dependence on external aggregators may reduce margins and limit control over customer relationships.

An important result of the study is the substantiation of the role of human capital in the sustainable development of hotel chains. The quality of hotel services directly depends on the professionalism, motivation, and engagement of employees. Therefore, staff training, the development of service competencies, language and digital skills, lower employee turnover, and the formation of a corporate culture of hospitality should be fixed as strategic priorities for hotel operators. Expanding partnerships between hotel chains, universities, colleges, and vocational training centres is a particularly promising direction.

The study also confirms that hotel chains can have a significant impact on the sustainable development of Kazakhstan's regions. Their activities generate demand for transport, excursion, restaurant, trade, and cultural services, create jobs, stimulate small business development, and increase the tourism attractiveness of territories. However, this effect arises only when hotel chains are integrated into regional tourism clusters. Therefore, strategic management should take into account not only the internal efficiency of a hotel chain, but also its contribution to the development of local suppliers, tourist routes, event projects, and regional branding.

The practical significance of the study lies in the fact that the proposed approaches can be used by hotel chains in Kazakhstan when developing medium- and long-term sustainable development strategies. For international and national chains, they can help strengthen the ESG component, increase digital maturity, and improve quality management. For regional hotel operators, the proposed model may serve as a tool for reducing seasonality, developing human resources, and integrating into tourist routes. For public authorities and development institutions, the findings may be useful in designing tourism infrastructure support programmes and assessing the effectiveness of investment projects.

The scientific significance of the study lies in the fact that hotel chains in Kazakhstan are considered not only as commercial enterprises in the service sector, but also as complex socio-economic systems influencing the sustainable development of regions. The proposed model integrates the principles of strategic management, sustainable development, the ESG approach, digital transformation, and cluster-based tourism development. This broadens the theoretical basis of hotel business research in Kazakhstan and creates a foundation for further empirical assessment of the sustainability of hotel chains.

At the same time, the study has certain limitations. The main limitation is associated with the insufficient availability of data on individual hotel chains, especially regarding ESG indicators, digital maturity, human resource policy, and operational efficiency. Official statistics usually present aggregated indicators by accommodation facilities and regions, which complicates comparative analysis of specific network operators. In this regard, further research may focus on developing an integrated sustainable development index for hotel chains in Kazakhstan, conducting expert surveys, analysing corporate reporting, and constructing econometric models to assess the influence of ESG and digital factors on the financial and operational results of the hotel business.

Thus, the sustainable development of hotel chains in Kazakhstan is possible only through a transition to a strategic management model based on a balance between commercial efficiency, environmental responsibility, social sustainability, digital maturity, and regional partnership. In the context of growing tourism activity, increasing investment interest, and expanding hotel infrastructure, such a model can ensure the long-term competitiveness of hotel chains and strengthen their contribution to the development of Kazakhstan's tourism economy.

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