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Ли Цзюньи

PhD докторант

И. Арабаев атындагы Кыргыз мамлекеттик университети

Бишкек ш.

752815257@qq.com**Чжан Каньи**

PhD докторант

И. Арабаев атындагы Кыргыз мамлекеттик университети

Бишкек ш.

1373856391@qq.com

БТЧЧ МОДЕЛИНИН АНАЛИТИКАЛЫК ПРИНЦИПТЕРИНИН НЕГИЗИНДЕ КЫРГЫЗСТАНДАГЫ ТУРИЗМДИН ТУРУКТУУ ӨНҮГҮҮСҮН ИЗИЛДӨӨ

Аннотация. Глобалдык атаандаштыктын күчөшү жана экологиялык туруктуулукка басым жасоонун өсүп жаткан шарттарында Кыргызстандын туристтик индустриясы экономикалык пайданы, жаратылыш ресурстарын коргоону жана жергиликтүү жамааттардын социалдык бакубаттуулугун жакшыртууну камсыз кылган өнүгүүнүн жаңы моделдерине өтүү милдетине туш болууда. Бул изилдөө туристтик рыноктун мүнөздөмөлөрүнүн, анын катышуучуларынын стратегиясынын жана жыйынтыктоочу социалдык–экономикалык эффекттеринин ортосундагы өз ара байланышты комплекстүү баалоого мүмкүндүк берген ТТТ моделинин (структура–жүрүм-турум-натыйжалар) аналитикалык принциптерин колдонуу менен Кыргызстанда туризмдин туруктуу өнүгүүсүн системалуу талдоого арналган.

Иште өлкөнүн туристтик чөйрөсүнүн негизги түзүмдүк өзгөчөлүктөрү, анын ичинде тармактагы атаандаштыктын деңгээли, рыноктун концентрациялануу деңгээли, инфраструктуралык камсыздоо жана иштөөсүнүн институттук шарттары изилденет. Ошондой эле негизги катышуучулардын — туристтик компаниялардын, мамлекеттик органдардын жана коомдук уюмдардын жүрүм-турум стратегияларын талдоого, туристтик агымдарды башкаруунун туруктуу механизмдерин киргизүүгө, бизнестин экологиялык жоопкерчилигин жогорулатууга жана инновациялык ыкмаларды өнүктүрүүгө басым жасалды.

Туризм секторунун натыйжалуулугун аныктоочу негизги факторлор: көрсөтүлүүчү кызматтардын сапаты, экономикалык кайтарымдуулук, региондук өнүгүүгө таасир, тармактын инвестициялык жагымдуулугу жана Кыргызстандын жаратылыш жана маданий чөйрөсүнө тийгизген таасири изилденет. Жүргүзүлгөн талдоонун негизинде туризмди андан ары өнүктүрүү үчүн ченемдик-укуктук базаны өркүндөтүү, туристтик продуктулардын атаандаштыкка жөндөмдүүлүгүн жогорулатуу, экологиялык багытталган маршруттарды түзүү, заманбап санариптик технологияларды киргизүү жана секторлор аралык кызматташтыкты бекемдөө сыяктуу артыкчылыктуу багыттар аныкталган.

Изилдөөнүн жыйынтыктары туристтик тармакты модернизациялоого жана Кыргызстанда туризмди узак мөөнөттүү, тең салмактуу жана атаандаштыкка жөндөмдүү өнүктүрүү үчүн шарттарды түзүүгө багытталган практикалык сунуштардын комплексин сунуштоого мүмкүндүк берет.

Негизги сөздөр: Туризмди туруктуу өнүктүрүү, Кыргызстан, экологиялык модель, туристтик рыноктун түзүмү, жүрүм-турум стратегиялары, тармактык натыйжалар, атаандаштык чөйрөсү, туристтик индустрия, социалдык-экономикалык натыйжа, экологиялык туруктуулук, институттук факторлор, туристтик саясат, туризмдеги инновациялар, туристтик агымдарды башкаруу.

Ли Цзюньи

PhD докторант

Кыргызский государственный университет имени И. Арабаева

г. Бишкек

Чжан Каньи

PhD докторант

Кыргызский государственный университет имени И. Арабаева

г. Бишкек

ИССЛЕДОВАНИЕ УСТОЙЧИВОГО РАЗВИТИЯ ТУРИЗМА В КЫРГЫЗСТАНЕ НА ОСНОВЕ АНАЛИТИЧЕСКИХ ПРИНЦИПОВ МОДЕЛИ SCP

Аннотация. В условиях усиливающейся глобальной конкуренции и растущего акцента на экологической устойчивости туристическая индустрия Кыргызстана сталкивается с задачей перехода к новым моделям развития, которые обеспечивают сочетание экономической выгоды, охраны природных ресурсов и улучшения социального благополучия местных сообществ. Данное исследование посвящено системному анализу устойчивого развития туризма в Кыргызстане с применением аналитических принципов модели SCP (структура–поведение–результаты), позволяющей комплексно оценить взаимосвязи между характеристиками туристического рынка, стратегиями его участников и итоговыми социально-экономическими эффектами.

В работе изучаются ключевые структурные особенности туристической сферы страны, включая уровень конкуренции в отрасли, степень концентрации рынка, инфраструктурное обеспечение и институциональные условия функционирования. Также акцент сделан на анализе стратегий поведения основных участников — туристических компаний, государственных органов и общественных организаций, влияющих на внедрение устойчивых механизмов управления туристическими потоками, повышение экологической ответственности бизнеса и развитие инновационных подходов.

В рамках SCP-модели исследуются ключевые факторы, определяющие эффективность туристического сектора: качество предоставляемых услуг, экономическая отдача, влияние на региональное развитие, инвестиционная привлекательность отрасли и воздействие на природную и культурную среду Кыргызстана. На основе проведенного анализа сформулированы приоритетные направления для дальнейшего развития туризма, такие как совершенствование нормативно-правовой базы, повышение конкурентоспособности туристических продуктов, создание экологически ориентированных маршрутов, внедрение современных цифровых технологий и укрепление межсекторного сотрудничества.

Выводы исследования позволяют представить комплекс практических рекомендаций, направленных на модернизацию туристической отрасли и создание условий для долгосрочного, сбалансированного и конкурентоспособного развития туризма в Кыргызстане.

Ключевые слова: Устойчивое развитие туризма; Кыргызстан; модель SCP; структура туристического рынка; поведенческие стратегии; отраслевые результаты; конкурентная среда; туристическая индустрия; социально-экономический эффект; экологическая устойчивость; институциональные факторы; туристическая политика; инновации в туризме; управление туристическими потоками.

Li Junyi

PhD doctoral

Kyrgyz State University named after I. Arbaev

Bishkek c.

1373856391@qq.com

Zhang Kanyi

PhD doctoral

Kyrgyz State University named after I. Arbaev

Bishkek c.

752815257@qq.com

A STUDY OF SUSTAINABLE TOURISM DEVELOPMENT IN KYRGYZSTAN BASED ON THE ANALYTICAL PRINCIPLES OF THE SCP MODEL

Annotation. In the context of increasing global competition and a growing emphasis on environmental sustainability, Kyrgyzstan's tourism industry is facing the challenges of transitioning to new development models that combine economic benefits, protection of natural resources, and improvement of the social well-being of the local community. These studies are devoted to a systematic analysis of the sustainable development of tourism in Kyrgyzstan using the analytical principles of the SCP (structure–behavior–results) model, which allows a comprehensive assessment of the relationship between the characteristics of the tourism market, the strategies of its participants and the resulting socio-economic effects.

The paper examines the key structural features of the country's tourism sector, including the level of competition in the industry, the degree of market concentration, infrastructural support and institutional conditions of operation. The emphasis is also placed on analyzing the behavior strategies of the main participants — tourism companies, government agencies and public organizations that influence the introduction of sustainable mechanisms for managing tourist flows, increasing business environmental responsibility and developing innovative approaches.

The SCP model examines the key factors determining the effectiveness of the tourism sector: the quality of services provided, economic returns, impact on regional development, investment attractiveness of the industry, and impact on the natural and cultural environment of Kyrgyzstan. Based on the analysis, priority areas for the Long-range development of tourism have been formulated, such as improving the regulatory framework, increasing the competitiveness of tourism products, creating environmentally oriented routes, introducing modern digital technologies and strengthening intersectoral cooperation.

The conclusions of the study allow us to present a set of practical recommendations aimed at modernizing the tourism industry and creating conditions for long-term, balanced and competitive tourism development in Kyrgyzstan.

Keywords: Sustainable tourism development; Kyrgyzstan; SCP model; structure of the tourism market; behavioral strategies; industry results; competitive environment; tourism industry;

socio-economic impact; environmental sustainability; institutional factors; tourism policy; innovation in tourism; management of tourist flows.

The influence of the tourism industry on the socio-economic development of Kyrgyzstan is of strategic importance due to the rich natural, cultural and historical resources of the country [1, p. 312]. Tourism plays a key role in improving the international image of the state, creating new sources of income, increasing employment, developing infrastructure and stimulating entrepreneurship in the regions. However, in a globalized economy, this area faces important challenges related to the need to maintain a balance between economic development, conservation of natural resources and ensuring the well-being of the local population [10, p. 300].

The transition to sustainable tourism development requires the introduction of management approaches that minimize environmental impacts, combat the degradation of natural areas, while increasing the level of services provided and equitably distributing economic benefits. In this context, the SCP (Structure – Conduct – Performance) model is becoming particularly relevant due to its ability to comprehensively analyze the relationship between the structure of the tourism market, the behavior of its participants and the final results of the industry [2, p. 396].

The application of the SCP approach provides a scientific basis for identifying the factors limiting the sustainable development of tourism, as well as for identifying priority areas for its transformation. This makes the study important both from a theoretical and practical point of view, since its results can serve as a reliable basis for developing effective tourism policy and strategies for managing tourism resources in Kyrgyzstan [9, p. 96].

The relevance of the study of sustainable tourism development in Kyrgyzstan is explained by a variety of social, economic, environmental, institutional and global factors that require a systematic analysis using modern scientific approaches. Tourism in the country is considered one of the most promising sectors of the economy, with the potential to develop an export-oriented service sector, increase employment, stimulate regional progress and diversify the economy. However, the unique tourism potential of Kyrgyzstan, based on the wealth of natural resources, cultural heritage and advantageous geographical location, remains insufficiently realized. This highlights the need to explore the obstacles to sustainable tourism development and find solutions through evidence-based strategies.

Global trends in the tourism sector show that stable growth is possible only if the principles of sustainable development are respected: environmental safety, social responsibility, economic efficiency and institutional harmony. Kyrgyzstan, with fragile mountain ecosystems and natural landscapes, as well as a high concentration of tourists in some regions, faces risks of environmental degradation, disruption of natural balance and loss of quality of recreational resources. This requires the introduction of new approaches in the management of the tourism industry, including the prudent use of natural resources, the protection of biodiversity and the introduction of environmentally oriented management solutions [6, p. 232].

Additionally, the industry suffers from a fragmented structure, insufficient competition, weak infrastructure, and limited adoption of digital technologies [4, p. 448]. The existing institutional framework also needs to be improved: there is a lack of effective coordination between the state and the private sector, there is an uneven distribution of tourist flows, innovation is poorly supported, and service quality standards remain low. These problems reduce the international competitiveness of tourism in Kyrgyzstan, despite its natural potential.

In 1995, the Kyrgyz Republic participated for the first time in the ITB Berlin International Tourism Fair. This first participation generated considerable interest in the country. Despite its independence, few people knew about the rich and attractive natural resources of Kyrgyzstan, including the Issyk-Kul region. At that time, the newly formed tourism enterprises had to work on shaping and promoting the image of the country — this was their primary task [11, p. 288].

In such a situation, the SCP (Structure–Conduct–Performance) analytical model serves as an important method for assessing the structure of the country's tourism market, analyzing the behavior of participants, and identifying factors affecting economic, social, and environmental outcomes. This approach helps to study the systemic problems of the industry, determine the impact of market conditions on the quality of services, analyze the strategies of market participants and assess their compliance with the principles of sustainable development.

In addition, the relevance of the study is further enhanced by global economic changes: the growing digitalization of services, the popularization of ecological and ethnotourism, the growing demand for safe, individualized travel products, as well as external shocks such as pandemics, political crises and economic instability. Kyrgyzstan needs to adapt to these changes through the development of management models that will ensure the sustainable development and competitiveness of the industry.

Thus, the urgent need for research is a scientific analysis of the tourism industry in Kyrgyzstan in order to form strategies for its long-term sustainable development. The application of the SCP model will make it possible to identify the main patterns of the industry's functioning, identify key problems and formulate recommendations for improving the quality of tourism services, supporting regional development, preserving natural potential and strengthening the country's position in the global tourism market.

THEORETICAL FOUNDATIONS OF SUSTAINABLE TOURISM DEVELOPMENT AND SCP MODELS

1.1. The concept of sustainable tourism development

The sustainable development of tourism is one of the most important areas of modern tourism science. It is aimed at achieving a balance between economic benefits, environmental interests and the social well-being of the population. According to international standards, a sustainable approach to tourism implies resource management that meets the current needs of tourists and host communities without compromising the ability of future generations to use the same natural and socio-cultural benefits [5, p. 60].

The key characteristics of sustainable tourism development are:

- An ecological component based on the rational use of natural resources and reducing the level of environmental impact;
- A social component aimed at improving the standard of living of the local population and the development of social infrastructure;
- An economic component that ensures the creation of stable incomes, supports entrepreneurship and increases the competitiveness of the sector.

Modern approaches distinguish such forms of sustainable tourism as ecological, ethnographic, cultural, agricultural and geotourism. Government policy plays an important role in ensuring this concept by developing regulatory documents, supporting innovation, stimulating small businesses, and implementing regional programs for the development of the tourism industry [7, p. 280].

1.2. Fundamentals of the SCP model: content, structure and significance for market analysis

The SCP (Structure–Conduct–Performance) model, developed on the basis of the theory of industrial organization, is one of the key analytical approaches for studying market industries. It reflects the relationship between the structure of the market (Structure), the behavior of its participants (Conduct) and the results of the industry (Performance).

Structure

The elements of the market structure include:

- the degree of concentration of participants;
- the level of competition;
- barriers to entry for new players;
- features of infrastructure and institutional conditions;
- allocation of available resources.

In the tourism industry, the structure determines the capabilities of enterprises, their competitive advantages, and ways to shape the entire industry [8, p. 368].

Conduct

The behavior of market participants covers:

- marketing activities;
- pricing strategies;
- implementation of innovative solutions;
- strategic planning;
- interaction with government agencies and local communities;
- standardization of travel services.

The actions of key sector participants determine the quality of the tourism offer, the creation of new products and the overall level of sustainability of the industry.

Results (Performance)

The effectiveness of the industry is reflected in the following aspects:

- economic (income, contribution to GDP, investment activity);
- social (employment, regional development);
- ecological (conservation of natural territories and ecosystems);
- institutional (effectiveness of management and cooperation).

1.3. Using the SCP model in tourism

The SCP model is actively used in the study of various sectors of the economy, including tourism. Its application allows you to:

- analyze the factors influencing the development of the tourism industry;
- to determine the relationship between the competitive environment and the quality of services provided;
- identify the strengths and weaknesses of the existing market structure;
- evaluate the strategies of the players in the tourism market in terms of compliance with the principles of sustainable development;
- develop recommendations to improve the effectiveness of tourism policy.

The SCP concept is widely used in international research to assess the competitiveness of tourist destinations, analyze the productivity of enterprises in the sector, study the impact of government policy on the industry, as well as research on innovation processes and digitalization in tourism.

For Kyrgyzstan, the application of the SCP model is of particular relevance, since the tourism industry is at the stage of active formation. The system analysis makes it possible to identify growth

prospects, increase the sector's resilience to external challenges and strengthen its position in the international arena.

Current trends in sustainable tourism in the world and Kyrgyzstan

The modern realities of the tourism industry confirm that the sustainable development of tourism occupies one of the leading positions in global tourism policy. Changes in the behavior of travelers, increasing environmental challenges, the active introduction of digital technologies and the transformation of consumer preferences are shaping new approaches to the development of the industry. These changes have a significant impact on tourism in Kyrgyzstan, setting the direction for modernization and adaptation of its structure.

Global trends in sustainable tourism

1. Focus on environmental friendliness and conservation of natural resources

Modern tourists increasingly prefer travel and services that comply with the principles of environmental sustainability. The most popular are:

- the development of ecological tourism with minimal impact on nature,
- the protection of natural sites and the creation of routes with long-term ecological potential,
- the use of energy-efficient technologies in transport, hotels and services,
- Dissemination of international environmental certification standards such as Green Globe and Blue Flag.

2. Involving local communities

New models of sustainable tourism are based on the active participation of local communities in the formation of a tourism product. This contributes to:

- increase of jobs,
- development of the ethno-cultural direction of tourism,
- preservation of cultural traditions,
- maintaining social stability in the regions.

3. Digitalization and innovation penetration

Global digital transformation processes have taken the lead in the development of tourism through:

- online platforms for booking and promoting services,
- integration of digital maps, virtual tours, mobile applications,
- automation of tourist flow management,
- intelligent analytics of travelers' needs and preferences.

4. Customized travel offers

Modern travelers opt for personalized and exclusive vacation programs, including:

- extreme and adventurous forms of tourism,
- rich cultural routes,
- gastronomic tourism,
- author's tours with unique local elements.

5. The concept of "Slow Tourism"

Tourists are increasingly choosing a slow pace of travel with an emphasis on harmony with nature, minimizing travel and in-depth exploration of the area. This area is especially relevant for mountainous regions with low building density like Kyrgyzstan.

Sustainable tourism trends in Kyrgyzstan

1. Popularization of ecological and mountain tourism

Kyrgyzstan reports itself as an ideal place for:

- mountain walks,
- climbing to the peaks,
- trekking routes,
- ethno and eco-destinations,
- equestrian tourism.

The natural attractions of the republic, such as the Tien Shan, Altyn Arashan and Lake Ala-Kel, attract the increased attention of travelers from all over the world.

2. Development of the ethno-cultural direction

Kyrgyzstan has a rich cultural heritage with a strong emphasis on:

- nomadic culture,
- the art of hand crafts,
- traditional housing (yurts),
- national cuisine and customs,
- ethnographic festivals like Nauryz or the festival of nomad games.

Ethnic tours help to preserve the cultural code and promote the active involvement of local residents in the development of tourism.

3. Active implementation of digital technologies

New technologies are also being introduced into the tourism economy.:

- development of online platforms to promote the national brand,
- strengthening the role of digital marketing,
- creation of interactive maps and mobile applications for the convenience of travelers,
- use of social networks to promote the sights of Kyrgyzstan.

4. Infrastructural challenges and institutional development

Despite the industry's potential, there are a number of challenges:

- insufficient development of transport infrastructure,
- lack of standardization of services at a high level

The analysis of the structure of the Kyrgyz tourism market is a comprehensive approach to assessing the current state of the industry, identifying key problems and prospects for its further development. Tourism in Kyrgyzstan is characterized by a dynamic increase in demand for services provided, but structural features and institutional constraints prevent the sector from realizing its full potential.

The general characteristics of the republic's tourism market demonstrate its versatility. The inclusion of a wide range of services, such as hotel complexes, transportation services, sightseeing programs, ethnotourism, ecological routes, spa holidays and the organization of cultural events, creates the basis for a variety of tourist products. The central geographical location of the republic in Central Asia contributes to its attractiveness as an international tourist destination for the CIS countries, Europe and Asia.

The foundation of Kyrgyzstan's tourism potential is a unique natural environment that encompasses high-altitude areas, glaciers, lakes and ecosystems with rich flora and fauna. In combination with the cultural and historical heritage, Kyrgyzstan acquires qualities that make it possible to form competitive tourist offers. Nevertheless, tourism development remains regionally uneven: most international visitors are concentrated in the Issyk-Kul region, while other regions are experiencing difficulties due to insufficient infrastructure and a limited range of services.

The structural problems of the tourism market require an analysis of its competitive environment. Despite its high fragmentation, dominated by small and microenterprises (guest houses,

small travel agencies, individual guides, and transportation companies), the dominance of small businesses creates both opportunities for flexibility and limitations for long-term investment initiatives. The lack of integration of market entities between segments (accommodation, transportation and direct travel services) reduces the complexity of the proposed solutions. In addition, the monopolization of certain sectors (for example, transport routes) and the pronounced seasonal nature of tourist activity increase market imbalances.

Infrastructural and logistical conditions also have a significant impact on the development of the industry. The Kyrgyz transport system is underdeveloped: the lack of high-speed railway lines and a limited air transportation network hinder the accessibility of the region for international tourists. The shortage of quality mid-range hotels in a number of areas further complicates the provision of high-quality services. Similar problems are observed in the segments of nutrition, ecological zones and sanitation in natural tourist areas.

The institutional environment, including government regulation and the legislative framework, plays a key role in maintaining tourism activity. Although strategies for the development of the sector have been developed at the national policy level, their implementation is faced with a lack of financial resources, inconsistency of programs at the regional level and insufficient monitoring of their impact. The existing legislative framework needs to be updated on environmental standards, standardization of the hotel business and investment attraction. Public-private partnerships also seem to be underdeveloped, which limits the possibilities for efficient use of resources.

As a result of the analysis, the main structural problems of the Kyrgyz tourism market can be identified: lack of infrastructure in key regions, high seasonality, development imbalance between regions, fragmented nature of the tourism product and low level of integration between key market actors. There are also problems of staffing at the level of professional education and training of specialists.

Thus, the development of tourism in Kyrgyzstan requires an integrated approach, taking into account regional specifics, improving infrastructure, strengthening cooperation between market participants and implementing institutional reforms to stimulate the growth of the industry, its sustainable functioning and increase competitiveness in the international arena.

Conclusion

The study of sustainable tourism development in Kyrgyzstan through the prism of the analytical principles of the SCP model revealed the main patterns, problems and prospects of the industry.

The analysis of the structure of the tourism market showed its high fragmentation, the predominance of small businesses, weak integration of participants and significant seasonality. These aspects limit the competitiveness and efficiency of the sector, creating risks for sustainable long-term development. Infrastructure provision and the institutional environment are developing heterogeneously, which requires an integrated approach to the modernization of the industry and effective coordination between the government, the private sector and local communities.

A study of the behavior of market participants revealed the use of limited strategies focused on short-term benefits. The lack of innovation and digital technologies reduces the overall effectiveness of the industry. In addition, the inconsistencies of current practices with the principles of sustainable development have been identified, especially in matters of environmental responsibility and the involvement of the local population.

The results of the analysis of the functioning of the tourism sector have shown the high potential of the industry, but its contribution to the socio-economic development of the country

remains limited. Imbalances have been found between economic growth, conservation of natural resources and an increase in the standard of living of the population in the regions [9, p. 96].

The application of the SCP approach allowed us to systematically identify the key limitations and opportunities of the industry, as well as formulate important recommendations:

- improvement of the regulatory framework and service standards;
- development of transport and hotel infrastructure;
- introduction of digital technologies and marketing tools;
- support for environmentally oriented types of tourism;
- strengthening the interaction of government agencies, businesses and local communities.

Thus, an integrated approach based on the principles of SCP provides the basis for building a long-term strategy for sustainable tourism development in Kyrgyzstan. This can increase the competitiveness of the industry, improve socio-economic indicators and preserve the country's unique natural and cultural heritage.

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Reviewer: Candidate of Pedagogical Sciences, Associate Professor Temirbek uulu I.