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FORMATION AND DEVELOPMENT OF INTERNATIONAL TOURISM IN KAZAKHSTAN (1989 – EARLY 2000s)

Abstract

This study explores the historical development of international tourism in Kazakhstan from 1989 to the early 2000s. Following the collapse of the Soviet Union, the country experienced major political, economic, and social upheavals that negatively impacted the tourism industry. Regional conflicts and the repurposing of tourism infrastructure to accommodate refugees led to a sharp decline in tourist flows. In response, the Kazakhstani government implemented initial legislative reforms—most notably the 1992 Law “On Tourism”—and joined the UN World Tourism Organization (UNWTO) to integrate into the international tourism system. The study is based on the historical-descriptive method, drawing on legal acts, statistical data, archival sources, and international reports. The findings reveal the emergence of national tour operators, issues in classification, the impact of inflation on revenue, and the imbalance between outbound and inbound tourism. Despite institutional efforts, the sector suffered from unreliable data, informal services, and a decline in visitors. Additionally, the study analyzes the long-term effects of infrastructural transformations and legal reforms. The authors argue that tourism history serves as a critical resource for improving contemporary tourism policy and governance in Kazakhstan.

Keywords: History of tourism, international tourism, Kazakhstan, post-Soviet transition, tourism development, tourism policy

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ХАЛЫҚАРАЛЫҚ ТУРИЗМНІҢ ҚАЗАҚСТАНДАҒЫ ҚАЛЫПТАСУЫ МЕН ДАМУЫ (1989-2000-ЖЫЛДАРДЫҢ БАСЫ)

Аңдатпа

Бұл зерттеу 1989 жылдан 2000-жылдардың басына дейінгі кезеңдегі Қазақстандағы халықаралық туризмнің тарихи дамуын қарастырады. Кеңес Одағының ыдырауынан кейін республикада орын алған саяси, экономикалық және әлеуметтік өзгерістер туризм саласына теріс әсерін тигізді. Аймақтық қақтығыстар мен инфрақұрылымның босқындарды орналастыруға бейімделуі туризм ағынының күрт төмендеуіне әкелді. Осы қиындықтарға жауап ретінде Қазақстан үкіметі 1992 жылы қабылданған «Туризм туралы» заң секілді алғашқы заңнамалық реформаларды іске асырып, Біріккен Ұлттар Ұйымының Дүниежүзілік Туризм Ұйымына (UNWTO) мүше болу арқылы халықаралық туризм жүйесіне интеграциялануға талпынды. Зерттеу тарихи-сипаттамалық әдіске негізделген және заңнамалық құжаттар, статистикалық мәліметтер, мұрағат материалдары мен халықаралық есептерге сүйенеді. Нәтижелер ұлттық туроператорлар жүйесінің қалыптасуын, саланы жіктеудегі мәселелерді, инфляцияның кіріс көрсеткіштеріне әсерін және кіріс пен шығыс туризм арасындағы теңгерімсіздікті көрсетеді. Институционалдық күш-жігерге қарамастан, туризм секторы сенімді деректердің болмауы, бейресми қызмет көрсетудің кең таралуы және туристер санының азаюы сияқты жүйелі қиындықтарға тап болды. Бұл Қазақстандағы өтпелі кезең туризмінің күрделі сипатын айқындайды, әрі туризмнің экономикалық әлеуеті толық іске аспағанын көрсетеді. Сонымен қатар, зерттеу барысында инфрақұрылымдық трансформациялар мен заңнамалық өзгерістердің ұзақмерзімді салдары зерделенеді. Авторлар туризм тарихын қазіргі саясат пен басқару тәжірибесін жетілдірудің маңызды дереккөзі ретінде қарастырады.

Кілт сөздер: Туризм тарихы, халықаралық туризм, Қазақстан, посткеңестік кезең, туризмді дамыту, туристік саясат

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ФОРМИРОВАНИЕ И РАЗВИТИЕ МЕЖДУНАРОДНОГО ТУРИЗМА В КАЗАХСТАНЕ (1989 – НАЧАЛО 2000-Х ГГ.)

Аннотация

Данное исследование посвящено историческому развитию международного туризма в Казахстане в период с 1989 года по начало 2000-х годов. После распада Советского Союза страна столкнулась с масштабными политическими, экономическими и социальными потрясениями, что негативно отразилось на туристическую отрасль. Региональные конфликты

и перепрофилирование туристской инфраструктуры под нужды беженцев привели к резкому снижению туристических потоков. В ответ на эти вызовы правительство Казахстана реализовало первые законодательные реформы, включая принятие Закона «О туризме» в 1992 году и присоединение к Всемирной туристской организации (UNWTO), с целью интеграции в международную туристскую систему. Исследование основано на историко-описательном методе и использует законодательные документы, статистические данные, архивные материалы и международные отчеты. Результаты показывают формирование системы национальных туроператоров, проблемы классификации предприятий, влияние инфляции на доходы, а также дисбаланс между въездным и выездным туризмом. Несмотря на институциональные усилия, отрасль сталкивалась с нехваткой достоверной статистики, распространением неформальных услуг и снижением числа туристов. Также рассматриваются долгосрочные последствия инфраструктурных трансформаций и законодательных изменений. Авторы подчеркивают, что история туризма служит важным источником для совершенствования современной политики и управления в данной сфере.

Ключевые слова: История туризма, международный туризм, Казахстан, постсоветский переход, развитие туризма, туристская политика

Introduction. The development of international tourism in Kazakhstan since independence has followed a complex and often contradictory trajectory. The early 1990s were marked by deep socio-political upheavals and economic transformations that directly influenced the tourism sector. The collapse of the Soviet Union, accompanied by ethnic conflicts in several former Soviet republics, led to a sharp decline in both domestic and international tourism activity across the region, including Kazakhstan. During this period, the country's tourism infrastructure, inherited from the Soviet system, was largely repurposed to address humanitarian needs—such as housing refugees—rather than servicing travelers. Official statistics from 1991 reveal that only 17,600 international tourists visited Kazakhstan, highlighting the extent of the decline [1].

However, Kazakhstan responded to these challenges by initiating important reforms and seeking integration into the global tourism community. The country joined the United Nations and the International Monetary Fund in 1992 and began forming diplomatic relations with over 140 countries. That same year, Kazakhstan adopted its first “Law on Tourism,” laying the legislative foundation for the industry. The country also acceded to the UN World Tourism Organization (UNWTO) and other key international agreements, gradually aligning its national tourism policies with global standards [2].

This period saw the emergence of several key institutional players, including national tour operators and regulatory bodies. Yet, despite these formal steps, the tourism industry faced persistent structural and statistical challenges—such as the lack of a unified classification system for tourism enterprises and difficulties in distinguishing between actual tourism activity and related or disguised services. The aim of this study is to trace the historical and economic development of international tourism in Kazakhstan from 1989 through the early 2000s. It explores the legislative reforms, institutional transformations, market trends, and statistical patterns that shaped the trajectory of the industry. Particular attention is paid to the dynamics of inbound and outbound tourism, the emergence of new service providers, and the economic performance of the sector in relation to macroeconomic conditions [3,4].

Methods. This study employs a historical-descriptive research method to investigate the development of international tourism in Kazakhstan from 1989 to the early 2000s. This method allows for the detailed documentation and interpretation of the historical, political, and economic processes that influenced the evolution of tourism during the post-Soviet transition period.

1. Research Design. The research follows a qualitative, document-based analysis supplemented with quantitative data where available. The goal is to reconstruct the key stages of tourism development and to understand the external and internal forces that shaped tourism policies, infrastructure, and market trends.

2. Data Sources. The study draws on a broad array of primary and secondary data sources:

Government documents and legal acts, including the Law "On Tourism" (1992), international agreements, and state tourism development programs. Official statistics from Kazakhstan's National Statistics Bureau regarding international arrivals, outbound tourism, and tourism-generated revenues. Archival materials from early tourism institutions such as "Intourist Kazakhstan," "Yassau," "Sputnik-Kazakhstan," and others that succeeded Soviet-era organizations. Academic studies, historical records, dissertations, and economic reports on Kazakhstan's post-Soviet transition and service sector restructuring. UNWTO reports, policy papers, and comparative data on international tourism trends in the CIS and global context.

3. Data Analysis Techniques. Descriptive historical analysis: Used to trace key milestones in the legislative, institutional, and market evolution of Kazakhstan's tourism sector. Comparative analysis: Applied to compare Kazakhstan's tourism trends with those of neighboring post-Soviet republics and global tourism developments.

Inflation-adjusted economic analysis: Financial indicators, especially income from tourism, are adjusted for inflation using historical exchange rate data (e.g., from 1994-2000). Visual data presentation: Timelines to illustrate critical political and legal changes (e.g., joining the UNWTO in 1994). Bar and line charts to display changes in the number of international arrivals and tourism income over time. Infographics to summarize institutional transformations and the diversification of tourism service providers.

4. Triangulation Approach. Given the lack of reliable, unified classification and statistical reporting in the early 1990s, the study uses triangulation to validate data. This involves cross-checking information from: Government archives, Tourism business records, Media and scholarly publications, International tourism databases (e.g., UNWTO). This approach helps ensure greater accuracy and compensates for the gaps or inconsistencies in the available data [5-10].

Results. In 1989, the tourism industry experienced significant disruptions and losses due to interethnic conflicts in Uzbekistan, Azerbaijan, Armenia, Georgia, North Ossetia, Chechen-Ingushetia, Ukraine, Moldova, Estonia, Latvia, and Lithuania. Many of these conflicts escalated into armed confrontations, triggering migration flows and leading to the repurposing of hotels and tourist bases for refugee accommodation. The political crisis was further compounded by an economic one. As a result of disrupted international and domestic tourism routes in 1990, Kazakhstan received only 17,600 tourists in 1991. That same year, the Soviet Union dissolved [5,6].

In 1992, Kazakhstan became a full member of the United Nations and the International Monetary Fund. It was recognized by 103 countries and established diplomatic relations with 144 states. That year, Kazakhstan adopted the Law "On Tourism" and officially recognized the "Tourism Charter" and the "Tourist Code," which had been approved in 1985 at the UNWTO General Assembly session in Sofia, Bulgaria. Since 1992, Kazakhstan has signed dozens of tourism-related agreements with other countries and adopted numerous regulations governing tourism activities, visitor entry procedures, and infrastructure development. These legal instruments have served as the foundation for tourism organizations and formed the legal basis for developing the national tourism concept [8].

In 1994, Kazakhstan joined the World Tourism Organization (UNWTO), marking its integration into the global tourism system. In 1991, the State Committee for Foreign Tourism was transformed into the national company "Intourist Kazakhstan," and in 1994, it became the joint-stock company "Yassau." The Republican youth tourism center "Young Tourist," established in 1991, continues to operate, along with the Federation of Sports Tourism and several hotels and tourist bases that formerly belonged to the now-defunct Kazakh Tourism Council, which had once been the backbone of mass tourism. The traditions of the former BMMT "Sputnik" are carried on by its successor, the travel agency "Sputnik-Kazakhstan," as well as other firms like "Under the Sun of Kostanay," "Aktobe Caravan," and "Sayakhat Shchuchinsk." Other former organizations such as "Kokshetautourist," "Uralsktourist," and "Kostanaitourist" continued to operate tourist and sports facilities in the early 1990s. Today, tours are organized by entities such as the international mountaineering camp "Khan Tengri," "Yassau," "Asia Tour," and others that either emerged in the late 1980s and early 1990s or have roots in the Soviet period [9].

During the early 1990s, numerous tourism firms and associations were established and then quickly dissolved. No comprehensive statistics exist on tourism enterprises of all ownership forms, and reconstructing their numbers is virtually impossible and unnecessary. At that time, many entrepreneurs included tourism in their charter activities, but often did not engage in actual tourism operations. By the mid-1990s, tourism activities were often hidden under classifications such as "forestry," "leisure and recreation," or simply "recreation" to avoid higher taxes on non-core business activities. As a result, financial and statistical reporting was frequently distorted. Many firms primarily offered tourist visa services or related services, further complicating classification and recordkeeping.

To this day, there is no unified and systematic classification framework for accurately identifying and recording tourism enterprises. The tourism sector broadly encompasses travel agencies, hotels, and restaurants, as well as organizations involved in healthcare, leisure and entertainment, culture, sports, various types of accommodations, specialized lodging facilities, and even nature reserves and zoos that provide services to tourists and excursion groups [6,10].

Despite the lack of accurate and comprehensive statistical data necessary for a systematic and structural analysis of tourism institutions and their activity trends, there is reliable evidence indicating the formation, development, modernization, and expansion of tourism infrastructure based on what had existed previously. Currently, Kazakhstan's tourism routes connect it to over 80 countries. However, there has been a general decline in both the number of tourists arriving in Kazakhstan and those traveling abroad, as well as in tourism-generated income. In the country's economic transition period, the level of outbound tourism—now even lower than in the 1980s—is particularly unfavorable. For the national budget, it would be more beneficial to reduce currency outflow by balancing inbound and outbound tourism flows.

Although democratic rights and freedoms, including freedom of movement, are officially upheld, governments still manage tourism supply and demand. In addition to marketing and pricing mechanisms, they often implement entry restrictions. For example, some countries reduce the number of visas issued (e.g., Germany), limit hotel construction near natural landmarks (e.g., Estonia), introduce or remove visa requirements (Schengen countries), lower investment costs for tourism projects, provide favorable loans (e.g., Switzerland and Greece), or impose special passport systems for children (e.g., Russia). When analyzing financial indicators, it is important to consider inflation. Between 1994 and 1996, the exchange rate rose fifteenfold—from 5 to 75 tenge per US dollar. Between 1999 and 2000, it doubled again to 150 tenge per dollar. Overall, from 1994 to 2000, inflation increased thirtyfold. Yet, these adjustments are often missing in both the statistical reports of Kazakhstan's Statistics Agency and academic publications, including S.R. Yerdavletov's 2003 monograph [11,12]. Without factoring in this inflation, any financial conclusions drawn are fundamentally flawed.

The systemic crisis that led to the collapse of the USSR resulted in only 17,600 tourists visiting Kazakhstan in 1991. In 1992, the number of people leaving Kazakhstan nearly matched those arriving. However, between 1993 and 1996, outbound travel significantly exceeded inbound tourism—an unfavorable trend for the national economy. Moreover, the number of foreign visitors declined sharply between 1994 and 1996, further reducing national income due to worsening economic and other conditions. The economic indicators for this period are presented in Table 1 below, according to data from the Agency of the Republic of Kazakhstan on Statistics.

Table 1 – Financial and Economic Indicators of Tourism Activities in Kazakhstan (1991-1996) [2,7,10].

	1991	1992	1993	1994	1995	1996
Total number of tourists served		1.143.458 including excursionists	1.514.994 including excursionists	1.651.210 including excursionists	950.500	791.325
Outbound tourism		233.819	622.357	700.492	700.500	650.218
Inbound tourism	17,6	236.044	420.057	450.718	250.000	141.107
Volume of tourism services (in thousand tenge)		1.049.631,3 (thousand rubles)	30.540,6	356.924,0	2.019.450,0	3.312.924,8
Profit (thousand tenge)		100.392,9 (thousand rubles)	4.820,3	112.429,0	180.945,0	250.107,0
Taxes (thousand tenge)		30.117,8 (thousand rubles)	1.315,9	37.847,0	40.194,0	120.245,3
Number of travel agencies		448	503	589	478	434

If the number of tourists arriving in Kazakhstan almost doubled between 1992 and 1994, then by 1996 it had declined to nearly half of the 1992 level. At the same time, the number of Kazakhstani tourists traveling abroad tripled between 1992 and 1994, and although it fell by 7% in 1996 compared to 1994-1995, it was still 2.8 times higher than in 1992. The number of operating tourism companies decreased by 4% in 1996 compared to 1992—essentially remaining unchanged (based on the number of firms submitting financial and operational reports). This suggests a clear shift in the business orientation of tourism companies—from domestic and inbound tourism to outbound tourism. Regardless of the professional qualifications of these companies, such a shift led to a decline in the production of original tourism products, as their services became limited to visa assistance, travel documentation, ticket booking, and organizing departures at airports or railway stations [5,7,12].

Taking inflation into account, profits tripled between 1993 and 1996. Despite the reduction in the number of inbound tourists, this increase—alongside the growth in the volume of services provided—could indicate either a broader range of services being sold or a rise in their prices. However, there is no statistical data available to confirm either of these possibilities. Since 1997, the imbalance between outbound and inbound tourism has been decreasing each year. The economic indicators of tourism sector development in the second half of the 1990s are presented in Table 2 below, based on data from the Statistics Agency of the Republic of Kazakhstan [2,4,12].

Table 2 – Financial and Economic Indicators of Tourism Activities in Kazakhstan (1997-2000) [2,7,10].

	1997	1998	1999	2000
Total number of tourists served	806,474	791,325	228,320	146,915
Outbound tourism	674,024	145,716	106,078	67,360
Inbound tourism	132,450	35,000	50,154	23,868
Volume of tourism services (in thousand tenge)	3346525,7	1916600,0	2421790,5	1882684,7

Profit (thousand tenge)	261328,0	1345477,7	1843995,5	2602783,8
Taxes (thousand tenge)	128,715	170208,4	88831,4	266418,2
Number of travel agencies	430	430	425	531

Table 2 provides, for the first time in academic literature, information on tourism-related profits and taxes for the years 1998-2001, as well as data on the volume of services in 1999. In the aforementioned monograph by S.R. Erdavletov, it was mistakenly claimed that such statistics were unavailable. Furthermore, for the first time, financial and other key tourism indicators for 2002-2003 are also presented.

In 2000, although the number of travel agencies increased by 20% compared to the 1996-1998 period, the number of both outbound and inbound tourists declined. This suggests that the expansion of the tourism agency network was not accompanied by the development of new travel and excursion routes, improvement of infrastructure, creation of original tourism products, or the development of attractive service programs and tour packages [3,13].

A persistent negative foreign exchange balance remained due to outbound tourism significantly exceeding inbound flows. The net currency balance—the difference between currency inflows and outflows—was negative, amounting to \$51.4 million, with expenditures totaling \$407.76 million versus \$356.36 million in revenue. It is also important to consider the specifics of widespread "shopping tours," in which travelers go abroad to purchase goods for resale within Kazakhstan. Additionally, there is the issue of hidden capital outflow. Unlike the Soviet era, when travelers were allowed to carry only a fixed amount of money, by the 2000s this limit had increased significantly, with tourists also able to transfer funds via bank accounts and credit cards.

Overall, the contribution of tourism to Kazakhstan's economy during the 1990s was minimal. By contrast, in Europe and some Asian countries, revenue from international tourism accounts for an average of 20% of GDP. In 2000, adjusted for inflation (1994-2000), the industry generated approximately \$17.5 million in profit, compared to just \$1 million in 1993. With profits increasing despite a fivefold decrease in tourist numbers, this situation calls for further economic analysis to assess the relationship between the cost and variety of tourism services offered. Compared to the Soviet period, the geographic distribution of tourist numbers shifted, with the new capital Astana, nearby industrial Karaganda, and the oil-producing regions of western Kazakhstan rising in prominence. The regional breakdown of tourist arrivals and the number of travel agencies is as follows: Almaty (70,387 tourists, 356 firms), Astana (34,307 and 48), Karaganda Region (12,070 and 56), East Kazakhstan (8,961 and 42), Pavlodar (4,132 and 20), Almaty Region (3,721 and 30), West Kazakhstan (3,377 and 6), Mangystau (2,412 and 12), Aktobe (2,373 and 17), Zhambyl (2,002 and 22), South Kazakhstan (1,567 and 29), Kostanay (503 and 13), Kyzylorda (388 and 9), Atyrau (343 and 9), Akmola (252 and 17), and North Kazakhstan (120 and 4) [1-5,8,14].

Industrial development in the central and western regions played a significant role in reshaping transport infrastructure, the hotel sector, and overall living standards, which contributed to the relative decline of the formerly dominant cultural and industrial hubs in southern Kazakhstan.

Among the earliest and most popular international travel destinations was Turkey, the first country to recognize Kazakhstan's independence, establish direct flights, and share close political-economic ties, as well as linguistic, cultural, and religious commonalities. In the following years, throughout the 1990s and early 2000s, other popular destinations included Germany, China, the UAE, Lithuania, Iran, North Korea, the Czech Republic, France, Spain, Poland, Italy, Greece, Israel, the UK, the USA, Australia, and others. The average length of stay for tourists was 5-6 days [5,15].

The concept of "popular travel routes" in Kazakhstan differs significantly from global trends. While international tourists tend to favor island resorts such as Hawaii, the Seychelles, the Canaries, the Maldives, Fiji, and the Bahamas, these destinations are prohibitively expensive for the vast majority of Kazakhstan's population—approximately 98%. As a result, domestic tour operators in Kazakhstan tend to limit their offerings to more affordable destinations that match the financial

capabilities of their clientele. Many of these routes are oriented around shopping tourism, with a commercial rather than recreational focus. Among non-CIS countries, Kazakhstan receives the highest number of inbound tourists from Germany, the United States, the United Kingdom, France, Japan, Italy, Turkey, the Netherlands, Austria, the Philippines, Canada, Iran, and others. These international visitors typically stay for up to 17 days. Outbound tourism within the CIS largely favors traditional destinations such as Issyk-Kul in Kyrgyzstan and various locations in Russia, reflecting established travel preferences despite a general decline in tourist numbers. Meanwhile, the most significant inbound tourist flows to Kazakhstan from CIS countries come from Russia, Moldova, Kyrgyzstan, Uzbekistan, and Tajikistan, with average stays of three to four days [5,15].

Discussion. The early years of Kazakhstan's independence marked a period of rapid expansion in international tourism. The newfound opportunity for citizens to travel freely abroad led to a sharp rise in outbound tourism, which significantly outpaced both inbound and domestic travel during this time [15]. This initial phase represented a critical turning point in the evolution of Kazakhstan's tourism sector. The country's transition to a market economy resulted in structural shifts within the industry, including a notable increase in private travel agencies and the introduction of legal and regulatory frameworks that facilitated private enterprise in tourism.

This phase is particularly significant due to the considerable growth in tourism-related metrics across the country. To enhance the quality and sustainability of tourism, the Cabinet of Ministers approved the "Regulations on Licensing and Certification of Tourism and Sports Activities," mandating that all state, public, and commercial tourism organizations acquire licenses from the Ministry of Tourism, Physical Culture, and Sports. This licensing system played a vital role in organizing tourism activity and led to improved service standards for both domestic and international tourists. Additionally, the establishment of monitoring and control mechanisms for tourism services helped raise the accountability of tour operators regarding visitor reception, accommodation, and overall service quality [16].

Recognizing tourism's importance for economic growth and international collaboration, the government adopted a resolution aimed at supporting tourism and sports development. This policy included tax exemptions for enterprises investing profits into tourism infrastructure, physical culture, and sports development. Furthermore, tourism and sports services were exempted from value-added tax, encouraging further investment in these sectors [17,18].

The number of travel agencies increased dramatically during this phase. While only three organizations were involved in tourism before 1991—namely the Kazakh Republican Council for Tourism and Excursions, Intourist, and the BMMT "Sputnik"—by 1994, this figure had grown to 589 registered tourism businesses. Outbound tourists primarily traveled to Poland, China (for shopping), and Bulgaria (for leisure). Meanwhile, inbound tourism to Kazakhstan came mainly from the UK, Germany, China, and the USA. The sector's contribution to GDP was modest but showed upward movement: 0.03% in 1991, 0.09% in 1992, 0.06% in 1993, and 0.08% in 1994.

From 1992 to 1994, the number of outbound tourists tripled, rising from 233,990 to 700,492. In the same period, inbound tourism nearly doubled, with 236,044 foreign visitors in 1992 and 450,718 in 1994. Reforms such as simplified visa procedures and the opening of borders to foreign investors significantly stimulated the growth of international tourism. The most substantial gains were seen in outbound travel by Kazakhstani citizens. At the same time, foreign business tourism to Kazakhstan increased, reflecting the growing interest of international investors in the country. During the 1990s, Kazakhstan witnessed the growth of educational tourism as a specific form of cultural and cognitive travel. This development was driven by the need for new knowledge and skills in response to the sweeping socio-economic changes occurring across the post-Soviet space. Many Kazakhstani travel agencies partnered with international governmental and non-governmental educational programs to send youth, schoolchildren, and professionals abroad for both short-term and long-term study experiences. In 1988, the first group of young Kazakhstani citizens participated in the "Work and Travel USA" program through the Almaty branch of the Center for International Exchange. This cultural and educational initiative, supported by the U.S. Department of State and operating across

the USSR and later the CIS since the early 1990s, enabled full-time students with conversational English skills to study, work, and travel simultaneously. Participants also had the opportunity to visit neighboring countries such as Canada and Mexico, and similar programs later expanded to include destinations in Europe, Latin America, and Africa [4,18].

Based on the experience gained in the 1990s, Kazakhstan implemented a series of financial and regulatory measures to encourage inbound tourism. Beginning January 1, 2002, companies involved in hosting foreign tourists were exempted from paying value-added tax (VAT). Visa procedures were also simplified for visitors from economically stable countries. The "Instruction on the Procedure for Issuing Visas of the Republic of Kazakhstan," approved by joint decrees of the Ministry of Foreign Affairs (No. 65) and the Ministry of Internal Affairs (No. 388) on July 11, 2000, was introduced. However, these steps proved insufficient, as they were not supported by robust international tourism promotion or significant improvements in the content and quality of tourist programs [9,11,18].

In response to earlier challenges, additional measures were implemented to further regulate and develop the tourism sector in Kazakhstan. The Government of the Republic of Kazakhstan approved the "Concept for the Development of Tourism in the Republic of Kazakhstan" by Resolution No. 333 dated March 6, 2001. This was followed by the adoption of the Law "On Tourism Activities in the Republic of Kazakhstan" (No. 211-II dated June 13, 2001), Government Resolution No. 1213 "Rules for Licensing Tourism Activities" (September 14, 2001), and the Resolution of July 26, 2001, which abolished exit visas for Kazakhstani citizens. Collectively, these legal acts streamlined the planning, organization, and implementation of travel activities, affirming the freedom of movement and removing outdated bureaucratic procedures. A newly introduced instruction simplified visa procedures for tourists from 54 politically and economically stable countries. It allowed for visa issuance upon arrival at airports in Almaty and Astana, and extended the duration of tourist entry visas from three to five days. Improvements were also made to customs procedures, including expedited baggage checks and simplified registration processes for foreign tourists. These efforts contributed to a more favorable international image for Kazakhstan and gave tourists more time to engage in leisure and exploration activities within the country [8,19].

As of today, Kazakhstan hosts 629 licensed tourism companies, including 287 tour operators, 347 travel agents, and 26 individual entrepreneurs. Over 98% of all tourism enterprises are classified as small businesses. Medium-sized firms, employing up to 250 staff members, account for approximately 1.5%, while large companies represent only 0.5%. The national tourism market also includes 28 tourism enterprises with foreign participation and two branches of international companies. A total of 904 tourist routes have been developed by Kazakhstani tour operators, including 27 equestrian routes, 59 adventure tours, 153 health and wellness itineraries, 65 fishing and hunting packages, 344 sports tourism products, 58 ecotourism options, 111 cultural and educational tours, 20 pilgrimage routes, and 67 routes based on the Silk Road heritage. Kazakhstan currently maintains tourism cooperation with 80 countries worldwide [7,19].

However, a more comprehensive analysis of tourism activities during the 1991-2000 period is constrained by the absence of detailed statistical data. Specifically, there is a lack of information regarding the professional, age, and ethnic composition of tourists and excursionists; the number and themes of tour programs; attendance at cultural institutions; pricing of services; the quality of hotel accommodations; and the educational and socio-economic background of tourists. Additionally, data on the income generated by environmental and other institutions through tourism, the number and geography of tour routes, and the involvement of specialized accommodation facilities such as sanatoriums remain scarce. These limitations are compounded by legal restrictions related to the protection of commercial and production confidentiality, as well as the safeguarding of intellectual property associated with tourism product development [19].

Nevertheless, the factual material presented enables a significant revision of the chronology of international tourism in Kazakhstan. It allows for the dating of its history as beginning a full century earlier than previously proposed by other authors. Similarly, the origins of transport-based tourism (notably horseback tourism) can be traced back 57 years earlier. This evidence also confirms the

existence of both individual and group tours, provides a comprehensive list of Soviet-era tourism systems and their organizational structures, and reflects the extensive geographical reach and thematic diversity of tourist routes. Furthermore, it documents the economic and financial activities of state and public tourism organizations during the Soviet period, the various forms and methods of tourism operations, the international relationships maintained by tourism institutions, and the legal frameworks governing their activities both within Kazakhstan and abroad. Additionally, it highlights the existence of scientific research and educational-methodological support structures for tourism, which contradicts previously held assumptions [19,20].

Regardless of the prevailing political or economic system, tourism inherently possesses an economic character. It exhibits a pulsating rhythm of development, marked by seasonality in the consumption of tourism products, cyclical patterns of material and technical modernization, and overall continuity in historical development. However, since the 1990s, a notable lag has been observed in the scientific support and theoretical foundation of tourism activities.

Conclusion. The trajectory of international tourism development in Kazakhstan from 1989 to the early 2000s encapsulates a period of deep transformation—both within the tourism sector and across the broader political, economic, and social fabric of the newly independent state. The dissolution of the Soviet Union not only disrupted established tourism flows and infrastructure but also exposed Kazakhstan to the complexities of building a market-oriented service industry under conditions of institutional fragility and economic uncertainty.

Despite these formidable challenges, the country's response was marked by a deliberate and strategic effort to align national tourism with international norms. The 1992 Law “On Tourism,” Kazakhstan’s accession to the UN World Tourism Organization, and the establishment of national regulatory and promotional bodies laid the groundwork for institutional coherence and legal clarity. These actions facilitated the gradual integration of Kazakhstan into the global tourism economy and opened avenues for bilateral cooperation, foreign investment, and knowledge transfer.

The findings of this study reveal that while outbound tourism experienced robust growth—driven largely by newly accessible foreign destinations and consumer demand—inbound tourism lagged behind due to inadequate infrastructure, limited international promotion, and policy fragmentation. Additionally, the tourism economy was burdened by weak statistical systems, the prevalence of informal service provision, and a lack of coordinated destination management. These systemic issues constrained the sector’s ability to contribute meaningfully to GDP and to position Kazakhstan as a competitive tourism destination.

However, the second half of the 1990s and the early 2000s witnessed important improvements, including the emergence of private tourism enterprises, diversification of tour products, simplified visa policies, and tax incentives for investors in tourism infrastructure. These measures contributed to a modest but crucial shift toward a more structured and commercially viable tourism sector. Moreover, the growth of educational and eco-cultural tourism during this period demonstrated Kazakhstan’s potential to develop niche tourism markets based on its unique cultural heritage, geographic diversity, and strategic location along the Silk Road corridor.

Importantly, this research contributes to a revisionist understanding of Kazakhstan’s tourism history by uncovering previously underdocumented data and correcting misinterpretations found in earlier scholarly works. It challenges the notion that tourism development in the country began in earnest only after the 2000s and instead highlights the foundational changes and pioneering efforts that took place during the 1990s. Furthermore, it emphasizes that tourism development in transitional economies is nonlinear, shaped by overlapping waves of crisis response, reform, experimentation, and adaptation.

In conclusion, the early post-Soviet period in Kazakhstan was marked not by the absence of tourism development, but by its formative complexity—an era in which critical groundwork was laid for future progress. Understanding this nuanced evolution is vital for policymakers, scholars, and tourism practitioners seeking to evaluate Kazakhstan’s current tourism strategies and to design interventions that are both historically informed and forward-looking. Future growth in this sector

depends not only on capital investment and international cooperation, but also on the country's ability to consolidate its past experiences into resilient, inclusive, and sustainable tourism policies.

Further Research. While this study provides a foundational understanding of the historical and economic evolution of international tourism in Kazakhstan from 1989 to the early 2000s, several areas remain underexplored and merit further investigation.

1. Post-2000 Developments and Contemporary Trends

Future research could extend the timeline beyond the early 2000s to explore how Kazakhstan's tourism sector has evolved in response to global trends such as digitalization, low-cost aviation, sustainable tourism, and post-COVID recovery. Investigating the effectiveness of state programs like the "Tourism Industry Development Program 2019-2025" could provide valuable insights into current strategies and performance.

2. Regional Disparities and Destination Management

There is a need for detailed studies on regional differences in tourism development across Kazakhstan's oblasts. Further research could focus on destination management practices in areas like Almaty, Shymkent, East Kazakhstan, or the Caspian coast, highlighting the role of local governments, DMOs (Destination Management Organizations), and public-private partnerships.

3. Tourism Infrastructure and Investment Patterns

An in-depth analysis of infrastructure development (hotels, transportation, attractions) and foreign direct investment (FDI) in tourism could reveal structural constraints and opportunities. Special attention could be paid to the impact of China's Belt and Road Initiative or the development of the "Silk Road" tourism corridor.

4. Tourism Labor Market and Human Capital

Research could also address the role of education and training in building a competitive tourism workforce. Studies on employment trends, professional standards, and the effectiveness of tourism and hospitality curricula at universities (e.g., Kazakh Tourism Academy, Almaty Technological University) would be highly beneficial.

5. Ecological and Cultural Sustainability

Future research should consider the long-term sustainability of tourism practices, especially in ecologically sensitive and culturally rich destinations. Case studies on community-based tourism, ecotourism in protected areas (e.g., Katon-Karagay, Aksu-Zhabagly), and the role of local stakeholders would deepen the understanding of tourism's social and environmental impact.

6. Tourism Statistics and Digital Monitoring

Given the challenges in tourism data collection and classification, there is scope for studies that develop improved methodologies for digital monitoring, statistical modeling, and tourism forecasting. Integration with big data, geospatial analysis, and tourism behavior tracking can enhance evidence-based decision-making.

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