

Restaurant Business in Kazakhstan in the Transition Period —Focusing on Three Case Studies in Astana City—

移行期カザフスタンにおけるレストラン事業 —アスタナ市の3事例を中心として—

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【Abstract】

This paper discusses the characteristics of the restaurant industry in Kazakhstan in the conditions of transitional economy. The study starts with investigating the public catering system of the USSR that is believed has had an impact on the establishment of the restaurant industry in modern Kazakhstan. The research proceeds with evaluating the results of interviews with top managers of three restaurants in Astana city presented in the form of case studies. Finally, the paper provides some preliminary conclusion attempting to assess the current situation, challenges and tendencies in the industry.

【Key Words】 Restaurant business, Kazakhstan, Astana, Transition, Case study

1. Introduction

This research paper describes peculiarities of the restaurant industry in Kazakhstan. The term ‘restaurant industry’ or ‘restaurant business’ used in this paper implies the commercial establishments (e.g. restaurant, cafe, bar, etc.) within the foodservice industry.

The topic is of high interest due to the following reasons. Firstly, most of scientific research on business in Kazakhstan has been focusing on oil or natural resource industry and ignored service-related spheres including restaurant industry, although it can be explained by their immaturity. Secondly, restaurant industry is now dramatically developing in Kazakhstan. Thirdly, restaurant

industry represents the Small and Medium Enterprise (SME) sector, which is a key sector for further development of Kazakhstan's economy.

Kazakhstan's business sector has been following its unique path in the challenging conditions of transition. At the earlier stages of the process biggest focus was on the oil and gas sector mostly associated with State Owned Enterprises (SOEs) to attract foreign investments, but recent government strategies emphasize the importance of private sector development. In this regard, it is strongly believed that restaurant business is a good example of a service sector to be prioritized in the coming decades.

The field of restaurant business in Kazakhstan lacks up-to-date research. Therefore, the purpose of this paper is to overview the industry through the frame of previous studies and then present the real state of the industry by focusing on three different establishments.

II. Literature Review

1. Transition and Entrepreneurship

Kazakhstan became independent after the dissolution of the Soviet Union in 1991. From that moment, the country is classified as in transition from planned to market economy. Kazakhstan has been facing the challenges to stabilize all the components of the complicated reformation mechanism summarized by the International Monetary Fund as following: liberalization, macroeconomic stabilization, restructuring and privatization, and legal and institutional reforms (Imf.org, 2000).

Rich oil and natural resource reserves were the major advantage of Kazakhstan for the smoother transition compared to other Former Soviet Union (FSU) states (The World Bank, 1993, p.8).

However, at the current stage the more attention is paid towards other sectors of economy, mostly working in the form of SME. Increasing SME input to GDP and boosting entrepreneurship and family business were stated as one of the milestones of the government's '2050 Strategy' (Strategy2050.kz, 2012). Such organizations like the Entrepreneurship Development Fund 'Damu' assist entrepreneurs by 'advising on opening and running a business, sharing information about support programs, and clarifying the conditions of work with financial institutions' (Kydyrova et al., 2016, p.6387).

Obviously, understanding the challenges of the transition process for SMEs and entrepreneurship is of high importance for identifying possible solutions. For instance, vulnerability and weakness of business regulations (e.g. customs, trade, licensing and permit); insufficient labor skills; taxation hardship; disappointing performance of the supporting institutions; poor infrastructure; financial constraints and macroeconomic instability were proved to have bigger impact on private entrepreneurs rather than SOEs in transition economies (Fankhauser, 2005, pp. 8-12).

2. Historical Background

Kazakhstan's foodservice industry is immature and lacks research (Yerdavletova and Mukhambetov, 2014). Therefore, due to the country's Soviet legacy, explaining the specifics of the industry in the USSR is helpful for understanding the present-day restaurant business development of Kazakhstan. Additionally, it should be mentioned that the Soviet Union policies and regulations in the food industry had been equally realized all over the country, however, in the Kazakh Soviet Socialist Republic it mostly covered big cities.

In 1923 the Soviet authorities introduced a national catering system or 'obshchepit' (abbreviation from Russian 'obshchestvennoe pitanie'), which 'offered better and cheaper food to the urban and industrial population', and had benefits over private businesses in the form of tax exemption and lower rent (Gumenyuk, 2015, p.64). According to the author (Ibid, p.66), this system eventually dismantled non-government establishments with the start of the five-year plans.

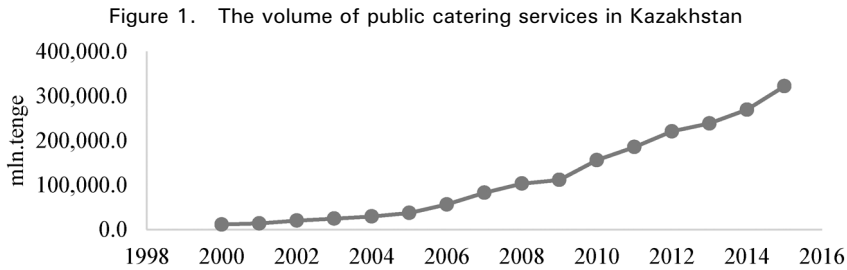
The state policy emphasized the importance of expanding the public catering system along with industrialization process and resulted in the establishment of the intentionally simplified and standardized 'Soviet cuisine' by the end of 1930s (Glushenko, 2012, p.568). Anastas Mikojan, the head of People's Commissariat of the Food Industry significantly influenced the culinary system by eliminating traditional home cooking and integrating it with the industrial production (Steila, 2015, p.5:13; Glushenko, 2012, p.570).

Gumenyuk (2015, p.68) stated that the service industry was at stagnation during the Second World War, and number of establishments has dramatically decreased.

By the Khrushchev's 'thaw' period (1953–1964) the obshchepit system reached the peak of its development, and the citizen started to be observed as consumer with the right to access variety of delicious food (Abdrakhmanova, 2017, p.54). However, Zaporozhets and Krupets (2008, p.323) argued that in the reality 'new Soviet consumer' experienced lack of places to eat out and their unsatisfactory quality.

Interestingly, the government defined the functionality of each type of establishment. So, the most visited self-service canteens and eateries were purposed to provide workers with hot lunch; cafes, on the other hand, were appropriate for resting in the evening with a book and cup of tea. Restaurants were determined for tasting gourmet dishes and celebrating big family events (Saktaganova and Abdrakhmanova, 2016, p.45). However, at the same time Soviet restaurants had a negative image of a place for 'senseless pleasure...visited by bohemians and even social outcasts' (Zarubina, 2014, p.54).

By the 1980s the food service industry experienced certain improvements including advanced production technology, partial automation, new architectural design and internationalization of



Source: Stat.gov.kz, 2018

cuisines (Ilyushchenko, 2015, p.98). However, these changes could not prevent the crisis in the foodservice sector. According to the author (Ibid, p.100), the restaurant industry lost its huge potential due to strong deficit of goods, sharp decrease of population’s solvency and weakened government control.

3. Characteristics of the Industry and Its Market

After the collapse of the USSR in 1991, Kazakhstan’s economy found itself in a crisis. As the food industry is considered an indicator of socio-economic development of the country, it can be concluded that restaurant industry was devastated at the beginning of Kazakhstan’s independence. However, as it is seen in Figure 1, the industry had been developing dynamically during 2000s.

The market is divided between high-end, middle, and low-end (including fast food) levels of establishments. While there are few luxury restaurants, middle level casual dining ones are expanding, and cheaper canteens and cafes are the most popular places (Yerdavletova and Mukhambetov, 2014, p.271).

Also, Kazakhstan’s industry is characterized by the variety of the offered food. One of the challenges after separation from the USSR was massive self-identification issue, however it was positively reflected in the foodservice industry by the diversity of cuisines (Petrenko, 2009, p.137).

One of the main problems of the industry, especially in chain restaurants, is insufficient service quality, partially because of low social status of a waiter (Petrenko, 2009, p.133, p.136). Moreover, according to Yerdavletova and Mukhambetov (2014, p.274), 60% of restaurants in Kazakhstan shut down due to bankruptcy within three years of operation because of bad management and wrong choice of a concept.

III. Case Studies

In order to have a grasp on the actual situation in restaurant industry, this part of the paper introduces three case studies of actual restaurants that are based on interviews conducted with

owners and managers of restaurants in the capital city Astana on September 6, 7 and 8, 2017. The restaurants operate in three different formats: bar, chain restaurant and family business.

The average duration of the interviews is 48 minutes. The questions were asked in Russian language with further transcription and translation of the records to English. The interviewees for this research were reached with the help of a public person popular in social media (the account name in Instagram is 'isenova').

Case Study 1: 'Public Bar'

Background and Concept

The case study is based on an interview with the founder of 'Public Bar'—a restaurant in the form of limited liability partnership—opened several months earlier in 2017, located in a residential area of Astana. This small-scale business is run by two friends, who are separately responsible for financial and operational work.

For the study, the interview was held with Mr. Turekulov Magzhan (26) with about 2 years of experience in the industry—the founder and owner in charge of overseeing day by day restaurant activity. Mr. Turekulov has educational background and work experience in finance, although he always wanted to work in restaurant industry. He added that he was advised by his family and surroundings to pursue financial degree rather than one in hospitality management, because there is no need for higher education to get work in a restaurant. So, the decision to change the life course was spontaneous and comparatively recent.

The concept of the place was chosen based on the facility characteristics among all other factors. 'Public Bar' offers online sports translations along with a selection of steaks, burgers, sandwiches, sausages and Mexican street food plates and craft beer. In this regard, the target customers are males of age 22–35. Due to the peripheral location, the restaurant focuses on representatives of the middle and lower class—mainly people living in the neighborhood.

Competitive Advantage

Mr. Turekulov emphasized that the competitive advantage comprises of passion and involvement in each process by the executive management as well the corporate culture of treating personnel as family members. For instance, staff was hired at the stage of renovating the future restaurant, and everybody took part in the process. This initiative was explained by the logic that employees would be more loyal if involved in range of activities wider than his or her direct responsibilities. At all the stages of restaurant development, Mr. Turekulov constantly educates his employees that there is no such a thing as 'one area of responsibility'—everyone should feel part of the organization and

sometimes do the work not directly related to the position or job description.

In this regard, the most significant aspect while recruiting new employees is personal characteristics rather than work experience, for instance. Same is true for selecting a distributor. The interviewee shared an example with two similar suppliers to choose from. In this situation the preference was given to the distributor who had personal approach to the business and made concessions during negotiations about price and conditions. Also, he was open to continue positive relationship not only as a business partner but also as a friend—for example, the restaurant owner was even invited to the fishing trip.

Doing Business in Astana

Mr. Turekulov moved to Astana from Almaty 4 years prior to the interview. He mentioned that opening a restaurant in Almaty would be more complicated in terms of availability of a proper facility and higher competition, and ‘there is more room for implementing new ideas in Astana’.

Starting a business involves some bureaucratic paperwork, including obtaining alcohol license, getting approval from sanitary-epidemiological station and fire department, etc. The main restriction was the absence of one stop service with uniform information available. In other words, the process requires ‘patience and experience’.

Major Difficulties

According to the interview results, the major obstacles in running restaurant business in Astana may be summarized as following: limited number of distributors, neighbors’ reaction, difficulty to change local preferences.

Distribution channels are not well developed yet, as well as supplier companies enter and exit the market very fast, which causes issues finding quality and long-term reliable partner. This situation forces to have multiple distributors, but still does not allow the access to all required products.

It should be noted that the restaurant is located on the first floor of a multi-storing apartment building, which is a common practice in the country. The issue related to this situation is neighbors’ perception of having a restaurant nearby—some might express negative emotions, although owners follow all the rules on noise regulation and sound isolation.

Moreover, one of the most serious restrictions in doing business in Astana is people’s adherence to a certain ‘traditional’ kind of food, meaning that it is almost impossible to change society’s mentality. Currently, fast and affordable doner-kebab, sushi rolls, and pizza kind of options are the most popular, because most people who prefer to eat out are middle-class representatives and students of different age.

International Influence

Mr. Turekulov to a certain extent believes that all new trends of restaurant industry of Kazakhstan are adopted from Russian market. In turn, Russian restaurateurs keep an eye on American and European markets. For example, burgers being popular food in the USA all the way until nowadays became hugely popular among Russian customers 3–4 years ago and gained their peak demand in Kazakhstan during the last two years. Although, it should be noted that it is true only for big cities like Astana and Almaty—people in less developed areas are not interested much in such kind of new tendencies.

The restaurateur believes that entrepreneurs that have personal touch to business will be able to change the situation on Astana market, and more and more creative and independent specialists will grow in Kazakhstan.

Customer Relations

The most frequent visitors of ‘Pubic bar’ are people living nearby. In this regard, the owners put a lot of effort in satisfying them; otherwise the whole business is under the risk of becoming ‘a total failure’. Therefore, Mr. Turekulov emphasized the importance of marketing and PR in restaurant business. This is what makes it different to manage a food service now compared to 10 years ago. He gave an example of using SNS to promote their restaurant: interestingly, about 90% of the focus in terms of advertising is directed towards Instagram. Besides running own Instagram page with frequent updates on new services and discount campaigns, another way to attract more customers is interactive meeting sessions with popular bloggers. Mr. Turekulov explained that people become more motivated to visit a restaurant if they are involved in face-to-face interaction.

IV. Case Study 2: ‘AB Restaurants’

Background and Concept

The interview for the study was conducted with Mrs. Iskakova Madina—PR manager of ‘AB Restaurants’. In addition, some secondary source interview materials of the restaurants’ owner were also used.

‘AB Restaurants’ Group is one of the largest chains in Kazakhstan founded in 2007. Currently there are 26 medium scale restaurants, including chain restaurants and so-called mono-brands, and according to Mrs. Iskakova this number will continue growing. The restaurants operate in Almaty and Astana only with about 2 million customers annually.

The paper limits its focus on two chain restaurants present in Astana: ‘Daredzhani’ with Georgian cuisine and ‘Del Papa’ that serves Italian food. The latter is characterized more like a drinking

place primarily with the target group being men of age 30–45. The Italian restaurant can be described as a middle-class family dining establishment. One of the characteristics is that none of the restaurants adapts dishes to the local taste—offering original cuisine to Kazakhstan is a priority. To achieve the high level of authenticity, the company management invited top managers and brand-chefs from abroad for a long-term prospective. In addition, managers and chefs frequently visit Europe to refresh their knowledge and stay updated about new tendencies.

Leadership

In her interview, Mrs. Iskakova mentioned undoubtable importance of the top manager's role in building chain business. The owner Askar Baitassov (33) continued family business and transformed it into a restaurant group 'AB Restaurants' during the last decade. He obtained management education from universities in Moscow and Holland, however decided to work in restaurant industry in Kazakhstan. In one of his interviews, Mr. Baitassov mentioned that together with his personal desire and ambition, the market itself was forcing him to develop several concepts simultaneously (Forbes.kz, 2013).

At the early stage of developing the chain, it was decided to rent property, because it was more cost-effective, and this practice is continued today. Moreover, all new restaurants are opened with the company funds only, without any external investments from banks, for example (BBC News, 2013).

Mr. Baitassov admitted that at first the business was run rather intuitively than involving deep analysis and forecast. However, now there is an established organizational structure that provides standardized business process.

The main objective of the owner is to improve people's lifestyle by introducing new places with unique atmosphere (Forbes.kz, 2012). Notably, the company's motto is 'to share the taste for life through the taste for food'. Perhaps, these efforts were noted and in 2013 Mr. Baitassov was rewarded as one of the Ernst & Young World Entrepreneurs of the Year.

Chain Restaurant Characteristics

The most important objective for chain restaurants is to maintain the same level of quality regardless of location and other factors. In other words, standards are very important. One of the instruments to maintain them is training and education of the personnel. At the hiring stage requirements are high—most importantly the person should be within the restaurant format. For example, for 'Daredzhani' the candidate is expected to be 'soulful', and for 'Del Papa' it is better to hire someone 'easygoing and sociable'. Afterwards, waiters must study the menu, whole meal

preparation process and drink ingredients during the probation month. As a final step, everybody should pass the exam before starting the work, which should be implemented, based on clearly described job instructions.

Logically, corporate culture is inevitable part the top management should rely on upon managing nearly 1,000 employees. There are various internal events that serve for this purpose. Every 3 months workers gather to participate in teambuilding activities. Also, twice a year everybody attends strategic sessions, where the head of the company Mr. Baitassov shares current achievements and possible prospects. Mrs. Iskakova strongly believes that this kind of approach makes the company stronger.

Another aspect of chain restaurant is well-established distribution channel. All suppliers have a long-term history with the company and they are not 'someone who came from the outside'.

Quarter-based assessment of effectiveness is another important norm to evaluate chefs and restaurant managers within 'AB Restaurants'. This helps to evaluate how people fit in the corporate culture, as well as to estimate the corporate progress.

Chain restaurant management requires certain technology level to maintain the standards by introducing automation. One of them is the hospitality software 'R keeper' that allows integration of all front and back office processes, including warehouses. Another new tool is a loyalty program application 'abr+' that was bought from Russia and customized for the local market. Guests can accumulate bonuses and use them at their convenience. It is also a good way for advertising new menu and offers. The application became popular and achieved the level of around 60,000 downloads by September 2017.

Slowdown Factors

Service quality level is still low in Astana. Mr. Baitassov says that one of the possible reasons is the absence of special educational institutions in hospitality industry since the collapse of the USSR. Also, employees often consider the restaurant job as 'short-term' and 'temporary'. So, waiters do not feel motivated to study and make better effort, and customers treat them accordingly (Forbes.kz, 2013).

Astana's restaurant industry just started developing and had some growth issues. Gradually people became more accustomed to eating out and it was a good sign for restaurateurs. However, economic crisis and several currency devaluations caused some slowdown for the company. Going to restaurants is not a primary necessity, therefore people reduced number of visits per month from 2-3 to 1 on average.

Interestingly, competition was not mentioned as a threat, because middle level chain restaurants

are not very common in the market.

V. Case Study 3: 'Alay Kitchen'

Background and Concept

The family business started in 2012 as a delivery of frozen homemade dumplings and cutlets. The target customer group included businesswomen who wanted to serve homemade food to their families, but did not have time to cook at home. The founder and owner of the business Mrs. Amirkhan Ainura (30) saw the opportunity to expand and opened a small-scale restaurant named 'Alay Kitchen' in 2017 with the support of her family. The menu offers variety of homemade fine dining dishes—traditional well-known cuisine in a modern serving. The main competitive advantage is the quality of ingredients that are made from natural products.

According to Mrs. Amirkhan, the biggest difficulty in establishing first restaurant business in Astana is the lack of employees with proper personal characteristics like decency, honesty, punctuality, responsibility and aesthetic sense of beauty. Interestingly, professional skills and work experience are not considered as significant factors.

Supporting Organizations

Mrs. Amirkhan moved to Astana from Yekaterinburg—a city in Russia. Therefore, during the interview the examples of Russia were frequently used to make comparisons. For instance, it was emphasized that bureaucracy was not an issue in Kazakhstan due to various aid from NGOs and supporting organizations—Mrs. Amirkhan herself is a member of the 'Association of Businesswomen of Kazakhstan'. Mrs. Amirkhan observes huge opportunities for developing young business in Kazakhstan with the help of such kind of organizations.

Specific Tendencies

Astana is a unique market and follows its own trends. For example, more and more Kazakhstanis prefer halal food allowed by Islamic religion. Also, people drink less alcohol compared to customers in Russia. This type of features shapes the restaurant industry in Kazakhstan, especially in Astana.

Mrs. Amirkhan also noted the lack of competitive ideas and creative restaurateurs in Astana. Back in 2012, when she just started homemade food delivery service, there was no similar business model in the market, because traditionally frozen food has been sold in supermarkets only. However, several years later some well-established clients of 'Alay' copied the concept and became their rivals.

Another argument to support this judgment is that there is only limited number of chefs in

Astana. They design similar menus for different restaurants, which results in monotonous restaurant market.

'Hype' Culture

One of the most significant challenges for new entrants is to change people's mindset. The interviewee explained that nowadays Kazakhstan customers were easily attracted by 'hype'—a certain trend widely discussed and followed in the society. For example, a popular Russian rapper opened a burger restaurant offering the guests black vinyl gloves to keep hands clean while eating. Later, many burger establishments in Astana followed this movement, because people liked this idea and wanted to be part of the latest trend. The danger of this situation is that hype never lasts long, and restaurants following this concept do not survive. Mrs. Amirkhan expressed the hope to alter the current situation by introducing fresh concepts along with high quality.

Future expectations

Mrs. Ainura Amirkhan expects some progress in the restaurant industry development, because the demand is becoming strict. Also, based on her personal experience, modern families prefer to dine out more frequently than previous generation. All these behavioral changes give hope for the expansion of the industry in coming decades.

Overall, Mrs. Amirkhan sees huge potential of Astana market, because of many opportunities for young entrepreneurs. Perhaps, now is the moment for Kazakhstan's restaurateurs to work hard and use all the chances to build a better industry.

VI. Discussion and Important Findings

Important findings from the case studies are as follows.

Firstly, many more people became interested in eating out at restaurants, and started to show their own preferences. Now the main factor of choosing a place is food quality, compared to the previous years when the focus was mostly on interior design and popularity. Restaurant top management clearly felt this significant change and put a lot of effort to improve the taste by using fresh and natural ingredients. In addition to the food quality Astana citizens tend to choose restaurants based on the location—the closer to the prestigious downtown part the better. However, as people become busier they prefer convenience and easy access. Perhaps, that is one of the reasons for new businesses to locate their restaurants in residential areas, which makes locals their target audience.

Secondly, social media is hugely used advertising and feedback tool especially for fresh entrants

due to its effectiveness and affordability. A comparatively new PR instrument is cooperation with public figures like Instagram bloggers, because modern Kazakhstan society is actively using internet resources and therefore widely influenced by recommendations of popular users.

Thirdly, the challenges vary depending on restaurant scale. For small-scale bar the focus is to find reliable distributors, while the chain restaurant pays attention to maintain the quality level and standards across every establishment. Moreover, top management of newly opened 'Public Bar' and 'Alay Kitchen' emphasized the urge to change people's mentality towards eating out: currently it is very hard to introduce new concept, because society has a common perception of what is trendy and what is not. On the other hand, long-established 'AB Restaurants' position themselves as trendsetters and believe they form a lifestyle.

Moreover, all the interviewees mentioned the low service level in Astana and highlighted the significance to hire restaurant workers with excellent personal characteristics.

Fourthly, many business concepts come from overseas, mostly from neighboring Russian market, because Astana's restaurant market is immature and still searching for its unique face. In general, restaurant market of Astana has a huge potential for growth, and in the future, will become highly competitive, as all interviewees agreed.

VII. Conclusion

The restaurant industry of Kazakhstan has been growing rapidly and has the potential to represent a successful model of SME in Kazakhstan. Currently, the industry is very immature, faces challenges and seems to need some support from local or national government for further development. In this regard, the government policy for supporting SME proposed in recent years should be helpful (Idrissova, 2017, p.122).

The main contribution of this paper is the case studies, which showed some evidence on aspects of restaurant business in Kazakhstan. However, the study has some limitations. Firstly, it has not given detailed data of the whole industry, and has not clearly explained how representative the three cases are for the whole industry. Secondly, considering the restaurant industry as an example of non-natural resource and mostly SME-related industries, this paper has not showed the unique importance of the industry. The detailed data and the unique importance of the restaurant industry will be presented in the next paper.

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