
Marketing strategies of foreign construction companies in Kazakhstan: integrated environmental and competitive analysis

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Abstract: With the acceleration of globalization, Kazakhstan has emerged as a crucial destination for foreign enterprises seeking to expand into emerging markets, particularly in the construction sector. Driven by abundant natural resources, a strategic geographical position, and improving business policies, Kazakhstan's construction industry is attracting increasing foreign investment. However, foreign companies face challenges such as complex regulations, cultural differences, and fierce competition. This study systematically applies PEST analysis, Porter's Five Forces, and SWOT frameworks to evaluate the market environment, industry competition, and the strategic positioning of foreign—especially Chinese—construction firms in Kazakhstan. The findings indicate that, despite the sector's strong potential and policy support, success relies on adapting to local contexts, leveraging technological advantages, and developing localization strategies. This research not only fills the gap in the literature on Kazakhstan's construction industry marketing but also provides actionable recommendations for foreign companies exploring the Central Asian market.

Keywords: construction, Kazakhstan, foreign companies, marketing strategies, PEST, SWOT, competition, environment, China, analysis, industry, investment

1. Introduction

In the context of deepening globalization, emerging markets have become key battlegrounds for international business expansion. Among these, Kazakhstan stands out due to its strategic location in Central Asia, abundant resources, and evolving investment environment. The construction industry, as a pillar sector, not only benefits from substantial government investment in infrastructure but also faces unique challenges related to local market structure, regulatory complexity, and competitive dynamics.

As China's economy enters the new normal, the construction industry is facing intelligent, intensive, and green transformation and upgrading, and marketing strategies have become a key factor in determining the effectiveness of enterprise operations and even the survival of enterprises [1]. In recent years, scholars at home and abroad have conducted extensive research on the marketing strategy of the construction industry, covering traditional construction enterprises, prefabricated construction enterprises, architectural design companies and architectural decoration enterprises. These studies not only explore the uniqueness of construction enterprise marketing, but also propose a variety of marketing strategy frameworks, such as 4R marketing strategy theory, 4C theory, STP marketing theory, etc., combined with the PEST model and Porter's five forces model [2-4], and demonstrate specific application practices through case studies.

In terms of theoretical and practical application of marketing strategies in construction enterprises, researchers emphasize the importance of combining theory and practice. For example, Chen Si (2022) took Company C as an example and proposed the theory of 4R marketing strategy to

improve the marketing competitiveness of enterprises [5]. Liu Guangming (2018) analyzed the internal and external environment for Henan Sanjian Construction Group and proposed differentiated competition strategies, relationship marketing strategies, and service marketing strategies [6]. These studies provide specific marketing strategy recommendations for construction companies.

The research on customer marketing strategies of construction enterprises is conducted through in-depth interviews and other methods to gain an in-depth understanding of customer needs and expectations [7,8]. Li Yiyang (2024) took X construction enterprise as an example, analyzed the macro environment and competitive environment faced by enterprises through the PEST model and Porter's five forces model, combined with the 4C marketing theory, and proposed a comprehensive improvement plan.

In addition, innovative research on marketing strategies in the construction industry has also attracted much attention [9]. Wang Weixi (2022) proposed that construction enterprises should innovate their marketing strategies from four perspectives: products, channels, promotions, and prices to adapt to environmental changes and achieve long-term high-quality development [10]. Yang Mingchao and Wen Jing (2019) discussed international marketing strategies to enhance the international marketing capabilities of enterprises [11].

However, foreign companies also face a number of challenges when entering the Kazakh market. First of all, the market environment in Kazakhstan is significantly different from that of Western countries, including policies and regulations, cultural customs, and market competition patterns. Secondly, as an important part of Kazakhstan's economy, the construction industry is a complex and volatile competitive situation, with fierce competition from local companies and competitive pressure from foreign companies from other countries. Therefore, how to formulate a scientific and reasonable marketing strategy to cope with the complex external environment and fierce market competition has become the key to the success of foreign enterprises in the Kazakhstan market.

In order to systematically analyze the external business environment, competition and advantages and disadvantages of foreign companies in the construction industry in Kazakhstan, this study will use PEST analysis, Porter's Five Forces Model and SWOT analysis to conduct an in-depth study of the market environment of the construction industry in Kazakhstan from multiple dimensions. Through these analytical tools, this study aims to provide a comprehensive market analysis framework for foreign companies to better understand the characteristics of the Kazakh market and develop more targeted and feasible marketing strategies.

Specifically, the PEST[12] analysis will be used to assess the external macro environment in which China's construction industry operates, including political, economic, social and technological factors. Porter's Five Forces model [13] will be used to analyze the competitive landscape in the construction industry, including the threat of potential entrants, the threat of substitutes, the bargaining power of suppliers, the bargaining power of buyers, and the degree of competition among existing competitors; The SWOT analysis[14,15] will be used to assess the strengths and weaknesses of foreign companies in the construction industry in Kazakhstan, as well as the opportunities and threats posed by the external environment. Through these analyses, this study will provide theoretical support and practical guidance for the development of marketing strategies for foreign companies in the Kazakhstan market.

Previous research on construction industry marketing strategies has mainly focused on traditional markets and established frameworks, such as the 4C, 4R, and STP models, often overlooking the distinctive characteristics of post-Soviet transition economies like Kazakhstan. There

remains a lack of systematic, comparative studies examining the intersection of macro-environmental factors, competitive forces, and firm-level strengths and weaknesses in this region.

This paper aims to bridge this gap by integrating PEST, Porter's Five Forces, and SWOT analyses into a unified framework, enabling a comprehensive exploration of the marketing challenges and opportunities faced by foreign construction companies—particularly Chinese enterprises—in Kazakhstan. The central research questions addressed are: (1) What are the major external and internal factors influencing the success of foreign construction firms in Kazakhstan? (2) How can these firms develop effective, context-specific marketing strategies? This research also provides actionable insights for policymakers and practitioners seeking to enhance international cooperation in the construction sector.

2. Methods

The purpose of this study is to systematically analyze the market environment, competitive landscape and advantages and disadvantages of foreign enterprises in Kazakhstan's construction industry, and provide theoretical support and practical guidance for foreign enterprises to formulate more targeted and feasible marketing strategies. The research method mainly adopts a combination of qualitative analysis and quantitative analysis, combined with PEST analysis, Porter's Five Forces model and SWOT analysis and other tools, to comprehensively evaluate the external environment and competition of Kazakhstan's construction industry. Here's how it worked:

This study adopts a qualitative research approach supplemented by quantitative data analysis. The main data sources are secondary data, including official statistics, government policy documents, and industry reports from China and Kazakhstan (primarily from 2020 to 2025). The selection of data prioritized authority, timeliness, and relevance to the construction industry.

The research framework integrates PEST analysis [12] (for macro-environmental scanning), Porter's Five Forces Model [13] (for industry competition analysis), and SWOT analysis [14] (for assessing the internal and external factors affecting foreign—especially Chinese—construction enterprises in Kazakhstan). Model selection was based on their suitability for evaluating the complex, policy-driven, and highly competitive context of the Kazakhstani construction market.

Comparative analysis between Kazakhstan and China was conducted to highlight key differences and similarities, with a particular focus on the unique challenges and opportunities faced by foreign companies. Typical cases—such as landmark infrastructure projects—were used to illustrate findings.

The limitations of this study include reliance on publicly available secondary data and lack of primary field research, which may affect the depth and immediacy of some findings. Furthermore, the subjectivity inherent in SWOT analysis and the potential for outdated statistics are acknowledged.

3. Environmental analysis of the current situation of the construction industry in Kazakhstan and China

Kazakhstan's construction industry has grown rapidly in recent years, underpinned by government-led infrastructure development and inflows of foreign direct investment. However, the sector remains sensitive to global economic volatility, particularly fluctuations in energy prices. Notably, Chinese companies have become increasingly active participants, injecting new technologies and management expertise into the local market.

By comparison, China's construction sector is characterized by a larger market scale, higher enterprise concentration, and world-leading technological capabilities. Policy initiatives such as the Belt and Road and the New Urbanization Strategy have further accelerated the internationalization of Chinese construction firms.

Despite these positive trends, fundamental differences in market environment, policy frameworks, and technological development persist between the two countries. These differences underscore the need for foreign firms to adapt their strategies when entering the Kazakh market. To further elucidate the macro-environmental and industry-specific challenges, this study applies the PEST, SWOT and Porter's Five Forces frameworks in the following sections.

Table 1. GDP data of China's construction industry

serial number	year	Construction GDP Index (Prev Year=100)	GDP per capita	gross domestic product
1	2010	113.8	110.1	110.6
2	2011	109.7	109.0	109.6
3	2012	109.8	107.1	107.9
4	2013	109.7	107.1	107.8
5	2014	109.6	106.8	107.4
6	2015	107.3	106.4	107.0
7	2016	107.7	106.2	106.8
8	2017	103.9	106.3	106.9
9	2018	104.8	106.3	106.7
10	2019	105.2	105.6	106.0
11	2020	102.7	102.0	102.2
12	2021	101.1	108.4	108.4
13	2022	102.9	103.0	103.0
14	2023	107.1	105.4	105.2

In contrast, China's construction industry is one of the largest construction markets in the world, and the GDP index of the construction industry is higher than the per capita GDP, indicating that the construction industry occupies an important position in China's economy, and its output value is growing faster than the per capita growth of the overall economy, indicating that its development is closely related to the country's economic development strategy. In recent years, the Chinese government has promoted the high-quality development of the construction industry through policies such as the Belt and Road Initiative and the New Urbanization Strategy. In terms of policy support, the Chinese government has adopted documents such as the Construction Law and the Green Building Action Plan to promote the standardization and green development of the construction industry and encourage construction enterprises to participate in international market competition. China's construction market demand is mainly concentrated in three aspects: infrastructure construction, residential construction and green buildings, and with the advancement of new urbanization, the demand of the construction industry will continue to grow. China's construction market is highly concentrated, with large state-owned enterprises (such as China State Construction and China Railway) dominating, but private enterprises are also gradually emerging. China's construction industry is a global technology leader, especially in the fields of prefabricated buildings, green

buildings and intelligent buildings, with strong technological innovation capabilities and high resource utilization efficiency.

From a comparative point of view, the construction industry in Kazakhstan has great market potential but small market scale, the competition pattern is relatively scattered, the policy support is large but the implementation is relatively weak, the technology is relatively backward but the entry of foreign-funded enterprises has promoted technological upgrading, and the resource endowment is rich but the utilization efficiency is low. Our country's construction industry has a large market scale, fierce competition, high enterprise concentration, strong policy support and relatively perfect policy system, world-leading technology and high resource utilization efficiency. There are significant differences between the construction industries of the two countries in terms of market environment, policy environment, technical environment and resource environment, but they also provide broad space and opportunities for cooperation and exchanges between the two sides.

3.1. An environmental analysis of the current situation of the construction industry in Kazakhstan and China

Macro Environment Analysis of China's Entry into Kazakhstan's Construction Industry (Based on PEST Model)

With the deepening of the "Belt and Road" initiative, Chinese construction enterprises have accelerated the layout of overseas markets, and Kazakhstan has become a key target for Chinese construction enterprises to expand the international market by virtue of its geographical location, policy support and economic development potential. Based on the PEST model, this paper analyzes the macro environment of China's entry into the construction industry in Kazakhstan from four dimensions: political, economic, social and technological, and puts forward relevant suggestions.

Political environment

The Kazakh government attaches great importance to the development of the construction industry and supports the growth of the construction industry through budget allocations, tax incentives and other policies. China and Kazakhstan have close cooperation under the framework of the Belt and Road Initiative, and Chinese-funded enterprises have participated in a number of infrastructure construction projects, which have improved the infrastructure level of Kazakhstan. However, uncertainties in the political environment in Kazakhstan, such as policy adjustments and geopolitical risks, may have an impact on the operations of Chinese companies.

Economic environment

Kazakhstan's economy is generally growing steadily, the government has increased investment in infrastructure construction, and the construction industry is in high demand, especially in the fields of transportation, energy and housing construction. The participation of Chinese companies in the Kazakhstan market has increased year by year, demonstrating their technical strength and project management capabilities. However, the Kazakhstani economy is highly dependent on energy exports, and energy price volatility and inflationary pressures may have an impact on the return on investment in the construction sector. In addition, exchange rate risk is also an issue that Chinese enterprises need to pay attention to.

Social environment

The labor market in Kazakhstan is relatively sufficient, but there is a gap between the level of technology and professional skills and the needs of Chinese companies. Chinese companies often adopt a "localization" strategy, recruiting and training local employees to improve the localization of their projects. Cultural and linguistic differences are a major challenge for Chinese companies, and it

is necessary to respect local cultural customs and strengthen cross-cultural communication. In addition, Kazakhstan's urbanization process is accelerating, and the demand for housing, transportation and public facilities continues to grow, providing a broad market space for Chinese enterprises.

Technical environment

Kazakhstan's construction technology is relatively backward, and the government has increased the introduction and promotion of new technologies in recent years. Chinese enterprises have significant technological advantages in the fields of prefabricated buildings, green buildings and digital construction management, and can help Kazakhstan improve its construction technology through technical cooperation and technical training. In addition, Kazakhstan is actively promoting the digital transformation of the construction industry, and Chinese companies can use their technology accumulation in the fields of BIM, Internet of Things and artificial intelligence to help upgrade the local construction industry.

To sum up, the construction industry in Kazakhstan provides a broad market opportunity for Chinese enterprises, but it also faces many challenges in terms of policy, economy, society and technology. Chinese companies need to combine their own strengths and develop a comprehensive market entry strategy to achieve sustainable development.

Analysis of the competitive environment of China's entry into Kazakhstan's construction industry

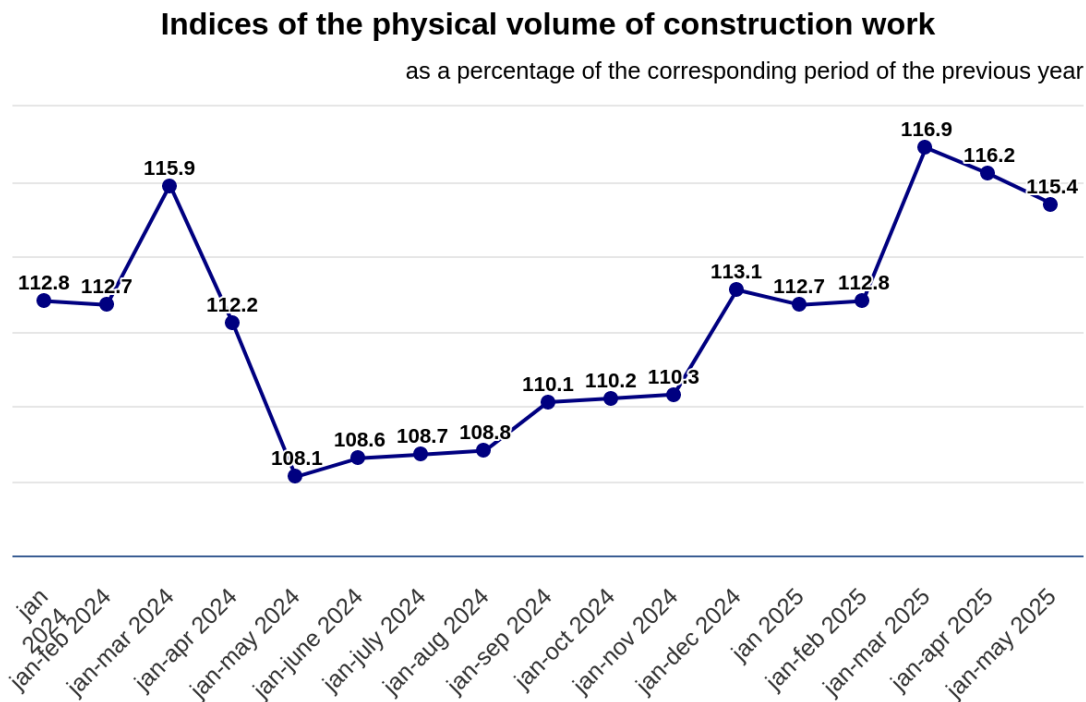


Figure 1. Indices of the physical volume of construction work in Kazakhstan.

With the deepening of the "Belt and Road" initiative, Chinese enterprises are gradually expanding their business in overseas markets. As one of China's advantageous industries, the construction industry is also actively exploring the international market. Kazakhstan is an important country in the Central Asian region, and the construction sector increased in January-May 2025 compared to the construction and maintenance of structures (up 20.7%) and non-residential buildings

(up 11.6%). Broken down by type of construction work (services) carried out between January and May 2025, non-residential buildings (25% of the total), roads, railways and subways (19.7%), and residential buildings (13.3%) accounted for the largest share. This paper will use Porter's Five Forces model to analyze the competitive environment of Chinese enterprises in Kazakhstan's construction industry and provide reference for enterprises to formulate strategies. Analysis of Porter's Five Forces Model.

3.2. Bargaining Power of Suppliers

The raw materials required for Kazakhstan's construction industry (such as steel, cement, wood, etc.) mainly rely on imports, especially high-end building materials. Due to the limited domestic production capacity in Kazakhstan, suppliers hold significant bargaining power in terms of raw material supply. Additionally, Chinese enterprises in the Kazakhstan market need to depend on local or international suppliers, further enhancing the bargaining power of suppliers.

3.3. Bargaining Power of Buyers

The buyers in Kazakhstan's construction industry primarily include government agencies, large enterprises, and individual consumers [16]. Government projects often account for a significant portion and are sensitive to price, thus buyers possess strong bargaining power. Moreover, the Kazakhstan market has high standards for construction quality; buyers tend to favor enterprises with technological advantages and good reputations, which also imposes higher demands on businesses.

Table 2. Registered and operating legal entities, branches and subsidiaries of foreign legal entities with foreign and joint ownership by country in Kazakhstan as of July 1, 2025

By country	Legal entities, branches and subsidiaries of foreign legal entities			
	with foreign ownership		with joint ownership	
	registered	operating	registered	operating
Republic of Kazakhstan	61,660	44,650	11,770	8,648
Russia	23,112	17,638	4,880	3,737
Uzbekistan	6,938	5,419	619	449
China	6,272	4,503	1,061	817
Türkiye	5,212	3,338	747	467
Kyrgyzstan	3,091	1,945	381	292
Azerbaijan	1,597	1,200	215	150
Ukraine	1,301	914	378	286
Germany	956	730	484	347
Belarus	916	738	196	155
Republic of Korea	881	562	162	108

3.4. Threat of new entrants

As of July 1, 2025, the number of registered legal entities, branches, and subsidiaries of foreign legal entities with foreign ownership increased by 5.3% compared to the same period of the previous year. In terms of the type of economic activity, the construction industry ranks third in terms of registered legal entities, branches and subsidiaries of foreign legal entities, accounting for 9.5%. Kazakhstan's construction market currently attracts many international construction businesses, including competitors from Russia, Turkey and the Middle East. While the market potential is huge, barriers to entry are also high, including the complexity of policies and regulations, language and cultural differences, and the ability to adapt to local markets. As a result, the threat posed by potential entrants is minimal.

3.5. Threat of Substitutes

The products and services in Kazakhstan's construction industry have a certain degree of substitutability, particularly in the residential construction and infrastructure sectors. The threat of substitutes mainly comes from construction enterprises in other countries, which may compete for market share by offering lower prices or greater efficiency. Furthermore, with advancements in technology, the emergence of new building materials and construction techniques could also pose a threat to traditional construction enterprises.

3.6. Competitive Intensity Among Existing Industry Rivals

The competitive landscape in Kazakhstan's construction industry is quite fierce, especially with significant competitive pressure on Chinese-funded enterprises in the local market. Chinese firms face dual competition from local businesses and international enterprises. Local companies are familiar with the market environment and possess cost advantages, while international companies have strengths in technology and management. As a result, the competitive intensity among existing industry rivals is high.

4. Analysis of the internal environment of China's entry into Kazakhstan's construction industry based on SWOT analysis

SWOT analysis is a widely used tool in strategic planning, which helps enterprises formulate scientific development strategies by analyzing the internal strengths, weaknesses, external opportunities and threats of the research object. This paper will systematically analyze the advantages and disadvantages of Chinese construction enterprises entering the construction industry in Kazakhstan from the perspective of internal environment [17].

1. Internal Strengths

Technical accumulation and professional ability

In the long-term development, Chinese construction enterprises have accumulated rich experience in construction technology and management, especially in the fields of infrastructure construction, prefabricated buildings, and green buildings. The technical strength of Chinese enterprises in complex projects such as high-speed railways, bridges, and tunnels provides a solid technical support for entering the international market.

Experience in cost control and management

Chinese construction enterprises have formed strong project management and cost control capabilities in the domestic market competition, and can optimize resource allocation and reduce construction costs on a global scale. This capability is highly competitive in the Kazakhstan market.

Policy support and resource integration

Through the Belt and Road Initiative, the Chinese government has provided policy support and financial guarantee for construction enterprises to "go global". At the same time, Chinese enterprises have advantages in resource integration, which can effectively coordinate domestic and foreign resources and improve the efficiency of project implementation.

Talent reserve and innovation ability

China's construction industry has a large number of professionals, including engineers, architects, and managers. In addition, China has invested a lot of resources in building technology innovation, such as BIM technology, intelligent buildings and prefabricated buildings, which are highly competitive in the international market.

2. Weaknesses

Lack of understanding of the local market

Chinese construction companies have limited knowledge of the laws and regulations, industry standards and cultural environment of the construction market in Kazakhstan, and may face adaptation problems in the early stage. For example, building codes and construction standards in Kazakhstan are different from those in China, which requires companies to adjust accordingly.

Cultural differences and communication barriers

Differences in language, culture, and working methods between China and Kazakhstan can lead to poor communication, affecting the progress and quality of the project. In addition, the construction industry in Kazakhstan may not be suitable for Chinese companies in terms of management style and cooperation model.

Lack of international experience

Despite their outstanding performance in the domestic market, Chinese construction companies have relatively little experience in construction projects in the international market, especially in Central Asia. This can lead to a lack of experience in dealing with international market competition and complex environments.

Brain drain and skills shortages

Brain drain is a common problem in the construction industry, especially in international projects, where the loss of good talent can affect the smooth implementation of the project. In addition, some employees have skills deficiencies in international project management, cross-cultural communication, and foreign language skills.

5. Results and discussion

Features of the marketing strategy adopted by Chinese companies when entering the construction industry in Kazakhstan

By using the PEST analysis method to analyze the external business environment of the construction industry; Porter's "Five Forces" model is used to analyze the competition in the construction industry. Using SWOT analysis to analyze the advantages and disadvantages of the construction industry abroad, we can analyze the characteristics of China's marketing strategy for entering the construction industry in Kazakhstan as follows:

1. Technology output and standard promotion

In the construction industry in Kazakhstan, Chinese enterprises not only export building materials, but more importantly, technical standards and equipment. For example, the Astana light rail project is the first rail transit project in Central Asia to be fully equipped with Chinese standards and equipment. This strategy not only demonstrates the sophistication and reliability of China's technology, but also enhances China's voice in the local industry through technology export, and also lays the foundation for subsequent cooperation.

2. Diversified market layout

The construction industry of Chinese enterprises in Kazakhstan is very diversified, covering transportation, energy, people's livelihood and other fields:

Transportation: Participation in the construction of roads, railways and rail transit, such as the Astana Light Rail project; Energy field: participate in the construction of power stations and power grids; People's livelihood: Participate in the construction of housing, hospitals and other infrastructure. This diversification not only diversifies market risks, but also enhances the overall influence of Chinese companies by fully participating in local infrastructure construction.

3. Combination of product and technical support

In the trade of building materials in Kazakhstan, Chinese enterprises mainly focus on cement, glass, ceramics and other products, and provide related equipment and technical support. 2. This combination of "product technology" not only meets the demand for building materials products in the Kazakhstan market, but also enhances the added value and competitiveness of Chinese enterprises through technical support.

4. Brand building and long-term cooperation

By undertaking landmark projects, such as the Astana Light Rail Project, Chinese companies have successfully established their brand image and demonstrated the sophistication of Chinese technology and standards. At the same time, through long-term participation in the infrastructure construction of Kazakhstan, Chinese enterprises have established a stable partnership with the local government, laying the foundation for the sustainable development of subsequent business.

5. Combination of policy and market

When Chinese enterprises enter the Kazakhstan market, they have made full use of the policy support of the "Belt and Road" initiative, combined with the needs of the local market, and promoted the cooperation between China and Kazakhstan in the building materials trade and construction industry. This strategy of combining policy with the market is not only in line with the national macro strategy, but also satisfies the commercial interests of enterprises.

To sum up, the marketing strategy of Chinese enterprises in the construction industry in Kazakhstan is characterized by technology output, diversified layout, combination of products and technical support, brand building and policy support. These strategies have not only helped Chinese companies successfully enter and occupy the Kazakhstan market, but also promoted the upgrading of local infrastructure and economic development, achieving mutual benefit and win-win results for both China and Kazakhstan.

6. Conclusion and Recommendations

In summary, this study demonstrates that Kazakhstan's construction industry presents substantial opportunities for foreign firms, provided they develop context-sensitive marketing strategies and invest in localization and technology transfer. Key recommendations include: (1) leveraging

technological strengths and international project management experience; (2) prioritizing the development of local partnerships and talent; (3) closely monitoring policy changes and adapting to regulatory shifts; and (4) enhancing cross-cultural communication to overcome social and organizational barriers.

This research enriches the literature on international construction industry marketing, and provides practical insights for enterprises and policymakers engaged in Central Asian infrastructure development.

Limitations of the study include reliance on publicly available information, which may be subject to time lags or reporting bias. Furthermore, the inherent subjectivity of SWOT analysis is acknowledged. Future research could incorporate primary data collection, such as interviews with industry experts or surveys of local stakeholders, to enrich the analysis.

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