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SPECIAL ECONOMIC ZONES: NEW PRIORITIES IN GLOBAL AND NATIONAL ECONOMY

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ABSTRACT

Purpose - The purpose of this paper is to evaluate the effectiveness of the special economic zones (SEZs) in Kazakhstan and study the new generation of zones in the global economy.

Methodology – The author used secondary data analysis related to SEZs operations in Kazakhstan. The author studied legislation related to zones functioning and articles of national and foreign authors on SEZ efficiency and impact on economies. For new trends of SEZ, development author reviewed the publications of international organizations like UNCTAD, World Bank, Asian Development Bank.

Originality/value -The article is useful for local zones development and impact management, as it is important to disseminate the best practices of foreign countries in the national economy. The role of SEZs in global is changing rapidly and Kazakhstan can absorb lessons learned in different aspects of zones operating.

Findings – The author made valuable conclusions based on the analysis of SEZs in Kazakhstan for correct evaluation of their effectiveness. The practical lessons from foreign experience could be implemented in management of such zones to compete in global economy.

Keywords – special economic zones, industrial zones, effectiveness, export, investments

The new stage in the evolution of special economic zones (SEZ) in Kazakhstan started with the adoption of new Law on Special economic and industrial zones signed by President K. Tokayev on 3d April 2019. According to the new legislation, there are definitions for the following category: special economic zone is a part of the territory of the Republic of Kazakhstan with precisely defined borders, on which a special legal regime of a special economic zone operates for the implementation of priority activities [1].

The legislation allows establishing a type of special zone which is called the industrial zone (IZ). The industrial zone is the territory supported by the engineering and communication infrastructure provided to private business entities for placement and operation of business facilities, including in the field of industry, agricultural complex, tourist industry, transport logistics, waste management, following the legislation of the Republic of Kazakhstan. In general, an industrial zone is created for providing economic and structural conditions conducive to entrepreneurship.

The specific objectives of the industrial zones are the following:

- facilitating the accelerated development of private entrepreneurship in the industry;
- reducing the cost of building new infrastructure;
- increase production efficiency;
- job creation.

The law defines the legal basis for the creation, functioning, and elimination of special economic and industrial zones in the country.

Also, according to the law, a new mechanism is introduced to provide land plots to special economic and industrial zones for participants. So, the plots will be provided for the temporary land use of the management company, which, in turn, will independently transfer them to the participants of the specified zones.

This mechanism will make it possible to reduce the time for the participants of the special and industrial zones to receive land plots.

The Law on the SEZ, which entered into force in April 2019, among other things, provides for:

- the special legal regime of the SEZ and conditions for the functioning of the zones, including taxation, customs regulation, public-private partnerships and guarantees of the legal protection of participants;
- creation of a Single Coordination Center for the development, promotion, and increase of the investment attractiveness of the SEZ and industrial zones;
- government funding and securing the responsibility of management companies. Funding will be provided only if 100% of the shares of the management company are owned by the state.

The Single Coordination Center will provide support to government authorities and at the republican level to solve their problems, which require changes in legislation or new approaches by the state bodies, without interfering with the daily operational work. The center will also introduce international standards into the authorities and try to create the most comfortable conditions.

Before the adoption of new legal act in SEZ in the country the most of related functions and responsibilities were on Kazakh Invest National Company.

There were established 12 special economic zones in Kazakhstan thanks to the initiative of the Kazakh Invest National company.

Table 1 shows the variety of all special zones operating on the territory of Kazakhstan.

As we can see from table 1 there are three largest by territory zones in the country: Khorgos - East Gate zones, National Industrial Petrochemical Technopark and Pavlodar SEZ. The major priority areas are chemistry, petrochemistry, trade, metallurgy, tourism, logistics. The average functioning period of zones is 20 years. SEZ Burabay was established in 2008 by Decree of the President of Kazakhstan. It functioned as a zone till 2017 and specialized in the touristic industry.

Table 1 - Special economic zones in Kazakhstan, 2019

Special economic zone	Term of functioning	Territory	Priority activity
Astana - new city	2001-2027	598 ha	Mixed
Saryarka	2011-2036	534,9 ha	metallurgy, heavy machinery
National Industrial Petrochemical Technopark	2007-2032	3475,9 ha	chemistry, petrochemistry
Seaport Aktau	2002-2028	2000 ha	logistics, oil equipment
Ontustik	2005-2030	200 ha	textiles, petrochemistry
Chemical Park Taraz	2012-2037	505 ha	chemistry
Khorgos - East Gate	2011-2035	4592 ha	mixed
Park of Innovative Technologies	2003-2028	163,02 ha	ICT and Research and Development
Pavlodar	2011-2036	3300 ha	chemistry, petrochemistry, metallurgy
Astana - Technopolis	2017-2042	584,42 ha	mixed
Turkistan	2018-2043	1338 ha	mixed
ICBC Khorgos	2017-2041	492, 57 ha	mixed, trade

Source: Kazakh Invest National Company [2]

If we take a historical approach for analysis of SEZ development on the territory of Kazakhstan, there were many attempts to launch huge zone projects since 1990. The majority of created zones emerged without due analysis and became economically inefficient [3].

With the adoption of new legislation on SEZ in 1996 and 2011, the number of new zones increased in the national economy. Are they effective?

Starting from 2013, the group of foreign experts conducted an audit of all special economic zones in Kazakhstan. As the audit results show three main groups of problems hampered the development of the FEZ

of Kazakhstan [4]. They are the lack of the necessary infrastructure, inadequate legislative base and the low efficiency of the governing bodies. To solve these problems, amendments were made to the Law “On Special Economic Zones of the Republic of Kazakhstan”, which provides the legal foundation for the creation of a Unified Coordination Center.

At the same time, it is necessary to clearly understand that many factors are hindering the development of special zones, and both financial resources and a certain time are needed to eliminate them. According to world practice, the process of filling the free economic zones with projects takes about ten years.

As our analysis showed the number of registered companies is quite big in each zone by the data of the Committee of State Revenues [5]. But the number of actively operating enterprises is low. The experts prove that there are preparatory infrastructure barriers for speedy development of local zones [6].

As the study shows the idea of SEZ creation is very popular in the regions of Kazakhstan, but are there any criteria for the assessment of SEZ effectiveness? One of the problems that local experts faced while developing SEZ was the set of criteria to evaluate the SEZ effectiveness. In foreign literature there are several indicators to apply: the number of jobs created inside and outside the zone, the volume of income generated by zone enterprises from export operations, the number of actively operating enterprises [7], the scope of forward and backward linkages with the rest of economy of hosting country [8].

In 2019 the Ministry of Industry and infrastructure development of Kazakhstan adopted the order “On approval of the methodology for assessing the effectiveness of special economic zones” [9]. When evaluating the efficiency of the functioning of special economic and industrial zones the following indicators are taken into account:

Table 2 – Indicators for evaluation of efficiency of the functioning of special economic and industrial zones in Kazakhstan

Indicator	Description
number of participants in special economic and industrial zones	including the number of participants with the participation of foreign investors in the composition of shareholders (participants) and participants implementing contracts for the implementation of activities as a participant in SEZs and IZs with the attraction of foreign investment
number of jobs created	by participants of special economic and industrial zones on the territory of special economic and industrial zones (plan/ fact) (temporary jobs/ permanent jobs)
volume of investments	including capital investments, made by participants in special economic and industrial zones in the territory of special economic and industrial zones (plan/ fact)
amount of revenue from the sale of goods, works, services, net of value added tax, excise taxes	and (or) the amount of income received by the participants as a result of the implementation of contracts for the realization of activities as participants and the SEZs and IZs (plan/ actual);
the volume of private investment	in the authorized capital of the management company of special economic and industrial zones in order to finance the creation of engineering, transport, social, innovation and other infrastructure objects of special economic and industrial zone
amount of taxes	paid by participants of special economic and industrial zones to the budgets of all levels of the budget system of the Republic of Kazakhstan (plan/ fact);
volume of customs duties	paid by participants of SEZs and IZs;
the number of engineering infrastructure facilities	built on the territory of special economic and industrial zones and put into operation (plan/ fact), and their design capacity;
the amount of budget investments	funds from the republican, local budgets in the construction of infrastructure (allocated/ mastered).

Note: compiled by author based on [9]

According to the law, evaluation of the effectiveness of the activity of special economic and industrial zones is carried out separately for each special economic and industrial zone according to the following criteria:

- 1) the effectiveness of the functioning of special economic and industrial activities;
- 2) the effectiveness of the activities of participants in special economic and industrial zones;

3) the impact of the activities of special economic and industrial zones on the socio-economic development of the region (region, city of republican significance, the capital) in whose territory they are established;

4) management efficiency of the management company of special economic and (or) industrial zones.

To assess the performance of special economic and/ or industrial zones, the following system is used:

5 points are given if planned indicators are achieved at a level of over 90 percent;

4 points are given if planned indicators are achieved by 71-90 percent;

3 points are given if planned indicators are achieved by 51-70 percent;

2 points are given if planned indicators are achieved by 36-50 percent;

1 point is given when the planned targets are lower than 35 percent;

0 points are given in the absence of the achievement of planned targets.

The total value of the total indicator of the activity of special economic and/ or industrial zones according to the actual achievement of the forecast-planned indicators (criteria) of the special economic and/ or industrial zone is determined as a weighted average.

Based on the obtained weighted average value, an assessment is made of the effectiveness of the activity of special economic and/ or industrial zones for the reporting period and for the period from the start of operation of the special economic and/ or industrial zone using the following points: from 5 to 4 points - a value reflecting the effective activity of special economic and/ or industrial zones;

from 4 to 3 points - a value reflecting the rather effective activity of special economic and/ or industrial zones;

from 3 to 2 points - the value reflects the conditionally effective activity of special economic and/ or industrial zones with the need to improve in certain areas;

from 2 to 1 point - a value reflecting the low level of efficiency of the activity of special economic and/ or industrial zones;

below 1 point - a value reflecting the inefficient activity of special economic and/ or industrial zones.

The objective to evaluate the effectiveness of SEZ and its impact to the rest of the economy is pivotal question for most of experts in many countries.

If we compare the results of foreign authors on the approaches to assess the effectiveness of SEZ we can draw the following table 3.

Table 3 – Set of indicators for estimation of the SEZ effectiveness in different countries

Study	Subject
China (between 1978 and 2007)	GDP, investment, employment, FDI exports, labor productivity
Poland	Export of enterprises in SEZ, annual remuneration costs, export of enterprises in zone, income taxes paid by companies in zone, value of sales of domestic production to the zone, value of import of zone enterprises, public support offered by the state, infrastructure investments incurred by municipalities, management of zone, performance results of the SEZ management companies.
Kazakhstan	Number of participants in special economic and industrial zones, investments, volume of amount of revenue from the sale of goods, works, services, , volume of customs duties paid by participants, the number of engineering infrastructure facilities, the amount of budget investments, volume of gross regional product of the region with zone, the amount of all taxes paid by zone and the region as a whole.
Sources: compiled by author based on [9], [10], [11]	

As we see from the data summarized in table 3 one more indicator could be added in the evaluation as the value of import of zone enterprises including from the rest of the country. It allows analyzing the backward linkages of zones. Also, there is no indicator of R&D expenses and training expenses.

Because of the lack of statistical data on each SEZ operating in Kazakhstan we are unable to evaluate their efficiency in this paper. However, we can interpret the results of diagnostic study of experts of Asian Development bank on SEZ in the country, arguing that SEZ Astana-New City, Aktau Sea Port zone and

Innovative Technology Park, appear to have achieved some success, since the first two accounts for the majority of goods produced in special economic zones of Kazakhstan, it seems that the remaining free economic zones have not made serious progress in this indicator. The Saryarka FEZ also achieved its goals concerning production, investment (including FDI) and employment. Such zones like Aktau Sea Port and Saryarka successfully attracted FDI. As for Ontustik zone, it succeeded in export generating and production increase [12].

There are two more important issues related to the development of SEZ in Kazakhstan. Firstly, the SEZ and Kazakhstan's membership in the World Trade Organization.

The World Trade Organization (WTO) does not have rules for special economic zones or industrial zones as such. In fact, until recently, the WTO did not deal with issues of the SEZ and industrial zones. Nevertheless, some aspects of these zones, especially their exemption from various taxes, may be in contradiction with WTO rules.

Secondly, due to the entry of Kazakhstan into the Eurasian Economic Union (EEU), its special economic zones and industrial zones are now regulated by the Treaty on the Eurasian Economic Union and by Agreement on free (special) economic zones in the customs territory of the customs union and customs procedures of the free customs zone of June 18, 2010. From August 6, 2015, the provisions of the EEU Treaty and the Customs Union Agreement on Free (Special) Economic Territories or Zones provide the framework within the EEU for the rules regarding the creation and operation of new SEZ and IZ. The main task of this general framework is to consolidate the laws of the member states regarding the activities of free (special) economic zones [12]. As we noted above, there are some effective SEZs in the Kazakhstani economy. For instance, Ontustik special economic zone is noted in the annual global ranking "Free economic zones-2018". The international fDi Magazine analyzes the global foreign direct investment market. The international rating of economic zones annually evaluates any type of investment projects around the world: special economic zones, export processing zones, free ports, etc. Each year, experts evaluate the work of about 50 zones from around the world in different nominations. Ranking participants are determined by several indicators, such as the number of residents, global coverage, available infrastructure, etc. The fDi Intelligence declared Ontustik special economic zone the winner in five categories: "China strategy", "Expansions", "Marketing slogan", "Charity initiatives" and "Community outreach award" [13].

What are the recent global trends in SEZs development?

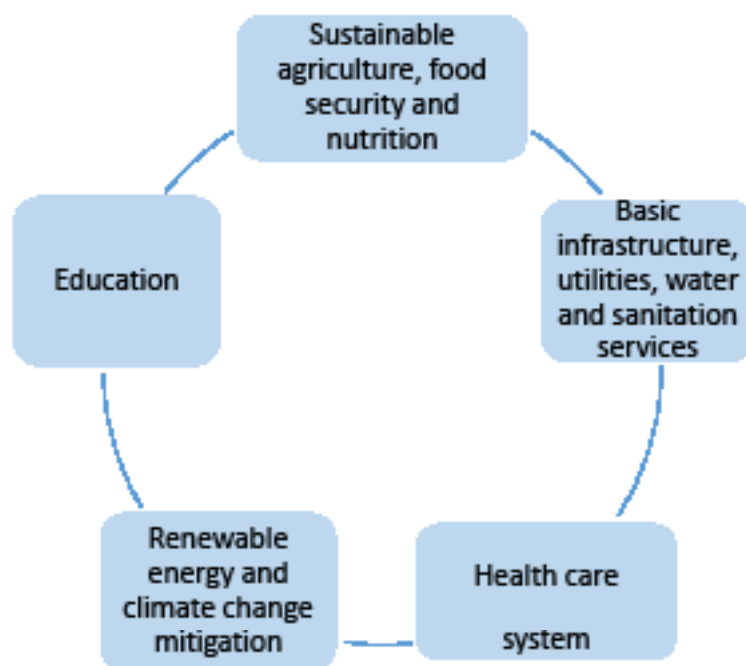
The mission and objective of modern special economic zones in the global economy have been changing over the past several decades. International market conditions are dynamically changing, and, as a result, SEZ is to fit in a new economic environment.

Global economic and market conditions are rapidly changing, and, as a result, SEZs are also evolving to suit the new business and economic environment.

In general, the recent concept of a special economic zone is the multifunctional zone with the wide territory, more integrated with the local territory (not an enclave), and less reliant incentives. The countries are interested in the "Zones 3.0" approach that puts the priority on low-carbon or green growth as well as trade and investment policies with domestic institutional frameworks, industries and communities [14].

Governments of most foreign countries put on the agenda the new model of zones in the framework of the implementation of the Sustainable development goals strategy launched by the United Nations Organization. Such SDG model zones could serve as a platform for realization SDG goals. They can provide services to control and support the SDG performance of firms operating in the zone. Such services could include inspection services on health and safety standards, as well as training and financial support to facilitate improvements, implement best practices.

The new priorities of the SDG model SEZs are shown in picture 1.



Picture 1 – Elements of new policy objectives in SDG model SEZs

Source: compiled by author based on [8, p.190]

As shown in picture 1 SDG model zones could offer facilities with benefits for the rest of the community, such as renewable energy facilities that serve the zone and outside the zone, waste management plants with additional capacity or other utilities with benefits beyond the zone. They could also offer services including housing, health care, and education facilities, recreational areas and other services.

Another type of zones of particular interest is Eco-Industrial Park (EIP) became increasingly popular in the 1990s. This concept is now increasingly popular in East and Southeast Asia. The concept of Eco-Industrial Parks has two dimensions: sustainability and industrial ecology [15].

To sum up, many modern types of zones are being developed that focus on industries such as high-tech, financial services, tourism, and environmental performance.

In conclusion, we can formulate a list of important lessons learned from foreign experience.

The size of a zone is an important component of its success [16]. Zone sites should be large enough to accommodate enterprises, especially those involved in manufacturing.

Most SEZs today are privately owned, developed and operated. Outsourcing zone development to the private sector can decrease the capital cost for governments.

In the case country implement special eco-parks or SDG model zones there should be added more sustainability-oriented indicators, such as numbers of vocational training institutions, consumption of energy and water, emission of dioxide, nitrogen oxides and ammonia nitrogen, and recycle rate of wastes.

Location is of primary importance in zone development. The most successful zones are those close to ports or large cities. The zone can not serve as the tool for the development of poor and remote areas of the country.

It is well known that each SEZ offers a range of incentives and subsidies

Although fiscal incentives and subsidies are important to attract investors, zones can be developed successfully without excessive reliance on incentives. In contrast, the primary reasons for the failure of many unsuccessful programs are weak governance, complex procedures, and insufficient infrastructure and services.

To reach success and positive impact of SEZ on the economy of hosting country the authority should set clear goals for SEZ performance, social and environmental standards, skill levels, training, and local content volume.

We can add that among other types of SEZ the authority can consider and implement the SDG model zone which will serve as the platform for the speedy transformation of Kazakhstan to the Green economy model. In this respect, the role of Single Coordination center would be crucial. This body would be able to monitor and evaluate the activities of the FEZ daily in the context of the work of the governing bodies, the development and construction of infrastructure, and the activities of participants in special economic zones.

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ТҮЙІН

Бұл мақалада автор Қазақстандағы арнайы экономикалық аймақтар мен индустриялық аймақтардың тиімділігін зерттейді. Қазіргі шетелдік тәжірибені ескере отырып, олардың тиімділігін бағалау әдістемесі келтірілген. Мақалада әлемдік тәжірибеде осындай аймақтардың дамуындағы жаңа үрдістер ашылған. Аймақтардың тиімділігін арттыру үшін қорытындылар мен ұсыныстар жасалды.

РЕЗЮМЕ

В данной статье автор исследует эффективность специальных экономических зон и индустриальных зон в Казахстане. Приведена методика оценки их эффективности с учетом современного зарубежного опыта. В статье раскрыты новейшие тенденции в развитии подобных зон в мировой практике. Сформулированы выводы и рекомендации для повышения эффективности зон.

SUMMARY

In this article, the author explores the effectiveness of special economic zones and industrial zones in Kazakhstan. A methodology for assessing their effectiveness is given taking into account modern foreign experience. The article reveals the latest trends in the development of such zones in world practice. The conclusions and recommendations are formulated to increase the efficiency of the zones.