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GOVERNMENT SUPPORT IN THE DEVELOPMENT OF KAZAKHSTAN'S PRODUCERS

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ABSTRACT

Purpose of the study. To study the system of state support for Kazakhstani producers and develop recommendations for improving its mechanisms.

Methodology. The implementation of the tasks is based on General scientific methods of knowledge and methods of experimental and theoretical level, which allow to determine the problems, expected results of the import substitution policy and methods of achieving them.

The main information base of the study was data from the statistics Committees of the Ministry of national economy of the Republic of Kazakhstan and the Register of goods, works and services used in conducting operations on subsoil use, scientific works of domestic and foreign researchers.

Originality / value of the research. The impact of state support on improving the competitiveness of domestic producers by stimulating local content is currently insignificant, since there are significant barriers to increasing the effect.

The theory and methodology of formation and development of the system of state support for local producers in Kazakhstan is in the process of formation.

Findings. The proposed recommendations can help increase local content in production, and are aimed at determining the list of existing production opportunities in the country.

Keywords: industrialization, producers, local content, import, innovative development, government support.

ҚАЗАҚСТАНДЫҚ ТАУАР ӨНДІРУШІЛЕРДІ ДАМУДА МЕМЛЕКЕТТІК ҚОЛДАУ

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АНДАТПА

Зерттеудің мақсаты. Қазақстандық тауар өндірушілер мен қызметтерді мемлекеттік қолдау жүйесін зерттеу және оның тетіктерін жетілдіру бойынша ұсыныстарды әзірлеу мақсатында оның қызметінің нәтижелерін бағалау.

Әдіснамасы. қойылған міндеттерді жүзеге асыру Жалпы ғылыми таным әдістеріне және проблематиканы, импортты алмастыру саясатының күтілетін нәтижелерін және оларға қол жеткізу

әдістерін анықтауға мүмкіндік беретін эксперименталды-теориялық деңгей әдістеріне негізделеді. Жалпы ғылыми әдістер мен тәсілдер қолданылды: жалпылау, жүйелеу және SWOT-талдау.

Зерттеудің негізгі ақпараттық базасы Қазақстан Республикасы Ұлттық экономика министрлігінің Статистика комитеті мен жер қойнауын пайдалану жөніндегі операцияларды жүргізу кезінде пайдаланылатын тауарлар, жұмыстар мен қызметтер және оларды өндірушілердің тізілімі, отандық және шетелдік зерттеушілердің ғылыми еңбектері болды.

Зерттеудің бірегейлігі / құндылығы. Қазіргі уақытта жергілікті қамтуды ынталандыру жолымен отандық тауар өндірушілердің бәсекеге қабілеттілігін арттыруға мемлекеттік қолдаудың әсері елеусіз, өйткені тиімділікті арттыру үшін елеулі кедергілер бар.

Қазақстанда жергілікті тауар өндірушілерді мемлекеттік қолдау жүйесін қалыптастыру мен дамытудың теориясы мен әдіснамасы қалыптасу барысында тұр, ал жергілікті қамтуды дамытуға бағытталған жұмыстарды ұйымдастыруды жүзеге асырудың және жетілдірудің негізгі әдістері негізінен Батыс практикасынан алынған және отандық экономиканың шарттарына бейімделе қоймаған.

Зерттеу нәтижелері. Жұмыста ұсынылған ұсыныстар өндірістегі жергілікті қамтуды арттыруға ықпал етуі мүмкін және елдегі қолданыстағы өндірістік мүмкіндіктер тізбесін анықтауға бағытталған.

Түйін сөздер: индустрияландыру, өндірушілер, жергілікті қамту, импорт, инновациялық даму, мемлекеттік қолдау.

ГОСУДАРСТВЕННАЯ ПОДДЕРЖКА В РАЗВИТИИ КАЗАХСТАНСКИХ ТОВАРОПРОИЗВОДИТЕЛЕЙ

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АННОТАЦИЯ

Цель исследования. Изучить систему государственной поддержки казахстанских производителей товаров и услуг и оценить результаты ее деятельности с целью выработки рекомендаций по совершенствованию ее механизмов.

Методология исследования. Реализация поставленных задач основывается на общенаучных методах познания и методах экспериментально-теоретического уровня, которые позволяют определить проблематику, ожидаемые результаты политики импортозамещения и методы их достижения. Были использованы общенаучные методы и приемы: обобщение, систематизация и SWOT-анализ.

Основной информационной базой исследования послужили данные Комитетам статистики Министерства национальной экономики Республики Казахстан и Реестра товаров, работ и услуг, используемых при проведении операций по недропользованию, и их производителей, научные труды отечественных и зарубежных исследователей.

Оригинальность / ценность исследования. Влияние государственной поддержки на повышение конкурентоспособности отечественных товаропроизводителей путем стимулирования местного содержания в настоящее время незначительно, так как существуют значительные барьеры для повышения эффекта.

Теория и методология формирования и развития системы государственной поддержки местных товаропроизводителей в Казахстане находится в процессе становления, а основные методы реализации и совершенствования организации работ, направленных на развитие местного содержания, заимствованы в основном из западной практики и не всегда адаптированы к условиям отечественной экономики.

Результаты исследования. Предложенные рекомендации могут способствовать увеличению местного содержания в производстве, и направлены на определение перечня существующих производственных возможностей в стране.

Ключевые слова: индустриализация, производители, местное содержание, импорт, инновационное развитие, государственная поддержка.

INTRODUCTION

Today, given the high capacity and the need to realize the potential of manufacturing industries, the urgency of increasing the production of industrial products for the needs of the domestic market of Kazakhstan is high. Import substitution in modern conditions is a key aspect for changing the place of the country's economy in global technological production chains.

In turn, import substitution is impossible without increasing the competitiveness of manufacturing industries in the domestic market and developing new international cooperation ties of domestic industry. Issues in the field of import substitution have been considered by many foreign authors, such as F. List, R. Prebisch, H. Zinger, X. Chenery, M. Bruno, A. Straug and others [1].

For example, H. Chenery, M. Bruno and A. Strug have formed theoretical models that have proven themselves positively in countries such as the United States, Great Britain, France, and Germany, which have a developed market economy [1]. In general, the authors describe in their works import substitution as a form of economic strategy and industrial policy, aimed on the one hand at improving the competitiveness of domestic producers, and with another — the positive effect of this in employment taxes and personal income.

Russian scientists such as O. Berezinskaya, A. Vedevev, and V. Baranov use examples of Russian industry to describe its dependence on imports of components and technologies, which increases every year, and the same trend is observed in the Kazakh industry [1].

Kazakhstan's small and medium-sized enterprises (SMEs) sector can play a key role in promoting overall prosperity, economic diversification, and private sector competitiveness. SMEs are an important source of economic growth and job creation and are thus crucial to overall prosperity. In Kazakhstan, the development of SMEs can help reduce the economy's dependence on extractive industries and the country's exposure to lower commodity prices. SMEs can also become sources and agents of innovation in production and exports, helping to develop higher value-added activities and create new and better jobs.

Kazakhstan's SMEs face internal and external uncertainty and often do not have the means to exploit existing market opportunities. Qualitative consultations with the private sector in Kazakhstan show a gap in professional and managerial skills and limited access to investment Finance as two key barriers to SME development.

The main goal of the state policy of industrialization, as a catalyst and basis for the diversification of the entire economy, is to create conditions for the development and formation of the manufacturing industry.

The government of the Republic of Kazakhstan, within the framework of its policy on economic diversification, is actively working to support domestic enterprises in order to develop local content and industry.

For this purpose, a number of support tools have been developed, the expected result of which will be an increase in the volume of Kazakh production, increasing the competitiveness of domestic enterprises, creating new promising industries and improving the quality of products.

According to the State program on industrial and innovative development for 2014-2019 and the Concept of industrial and innovative development for 2020-2025, it is envisaged to stimulate diversification and increase the competitiveness of the manufacturing industry, as well as the development of a new, expanding and "complicating" the existing range of products, including consumer goods and products in demand in foreign markets [2].

However, only state support measures cannot fully serve as a tool for achieving the set goals. In addition to state assistance to existing industries, it is necessary to provide recommendations and directions for the development of new industries for the production of competitive and high-tech products.

MAIN PART OF THE STUDY

The world practice of implementing industrial policy demonstrates the absolute advantage of export-oriented production. As the experience of developing countries shows, the path of import substitution for national enterprises by removing them from the competitive environment and supporting them with permanent state subsidies can lead to the stagnation of national industry in the future.

The policy of protectionism is implemented through the artificial creation of tax, financial and currency incentives for the development of individual domestic producers or a number of sectors of the national economy in order to increase their competitiveness in the domestic market. The most important institution here is private property, based on protectionism. However, protectionism, which restricts competition from the global market, actually leads to demotivation of development for domestic producers: in the absence of competitors, enterprises are not in a hurry to introduce innovations, and the only incentive for them are subsidies and other “state support measures” from the state.

The experience of foreign countries shows that countries that implemented only the import substitution strategy eventually faced a General deterioration in the economic situation, resulting in the promotion of inflation, a decrease in savings and, as a result, a reduction in investment activity, a balance of payments deficit and an aggravation of international currency liquidity problems [3].

These countries have not been able to restructure their economies and bring enough locally produced goods even to domestic markets. Enterprises that relied entirely on government support measures did not become competitive, and national governments that encouraged protectionism nurtured entire industries based on administrative resources rather than real competitiveness. The resulting profits were directed by such enterprises not for the development of production and modernization, but for lobbying their interests through the state in order to maintain the status quo. As a result, the budget policy of these countries was ineffective, and import substitution led not to growth, but to a decrease in the competitiveness of national production. Import substitution creates the illusion of self-sufficiency of the country's industries, while remaining vulnerable to external shocks.

According to a recent study of the IMF's industrial policy principles, one of the three key principles that make up the technology and innovation Policy (TIP) on which the success of the Asian miracle countries is based is the orientation of industrial policy towards exports, in contrast to the typical failed “industrial policy” of the 1960s and 1970s, which was mainly import-substituting industrialization.

Thus, the model of industrial policy in 1960-70 was to create production facilities, mainly in heavy industry, which were mainly focused on the domestic market, that is, on import substitution. Among the most successful examples that showed an increase in the value added of production per capita on average for the year between 1965-1980, we can mention Indonesia by 10 %, Nigeria by 7 % and Brazil by 6 % [4]. However, their performance did not reach the level of the Asian miracle countries ' breakthrough. In Korea, where per capita income was comparable to that of Indonesia, the value added of production per capita grew by 15 % per year, while in Taiwan province in China and Singapore it grew by about 12 %.

During the later period of 1980-2010, the result of the import substitution policy in most developing countries was the stagnation of industrial production [5]. The main reason was the lack of competition, which led to a drop in investment in R&D and innovation, and almost complete dependence on imported intermediate goods, especially high-tech products. Dependent on various types of protection from international competition and subsidies, domestic producers that previously had no export-oriented competitive advantages have become extremely vulnerable to a combination of devaluation and tariff cancellation, as the cost of their resources has increased.

As a result, when protection and support measures are removed, in the phase of fiscal consolidation or currency crisis, the Import substitution industrialization model becomes sharply unstable, and industrial policy is doomed to failure.

In summary, export orientation was an important component of the industrial policy of the Asian miracle countries. This was a major departure from the import substitution policy adopted in most developing countries in the 1960s and 1980s [6]. At first glance, these two types of policies are similar: both apply tariffs to protect their domestic markets and subsidies to support domestic leaders in certain strategic sectors. However, these similarities, which are usually downplayed or simply ignored because they don't fit the standard recipe, hide fundamental differences in accepted approaches.

According to the latest review of the world industrial policy of UNCTAD (United Nations Conference on Trade and Development), there is a change in the orientation from import substitution to an expanded range of measures and tools to support the development of industry.

Thus, one of the key principles of implementing an adaptable, ambitious and accountable industrial policy in the country is to follow the policy of import-substituting industrialization, which should be combined with export diversification based on the creation and development of new businesses that are oriented to the world market and viable in the conditions of global competition.

As part of this work, an analysis of the market and the volume of purchases of subsoil users, system – forming enterprises and national companies was carried out to identify potential demand for goods, works and services in the dynamics of the years (2014-2018).

The analysis to determine the demand for imported goods was carried out by identifying annually recurring product items according to the CPTEA (Classifier of products by type of economic activity) code in the procurement reports of monitoring subjects for the period from 2014 to 2018, after which identical product items were summarized.

In order to identify the most popular imported products of the monitoring subjects, large companies with the largest share of imports were identified.

Thus, large companies in Kazakhstan imported more than 2,300 thousand items of goods in constant demand for the period 2014-2018, amounting to more than 5,300 billion tenge (see figure 1) [7].

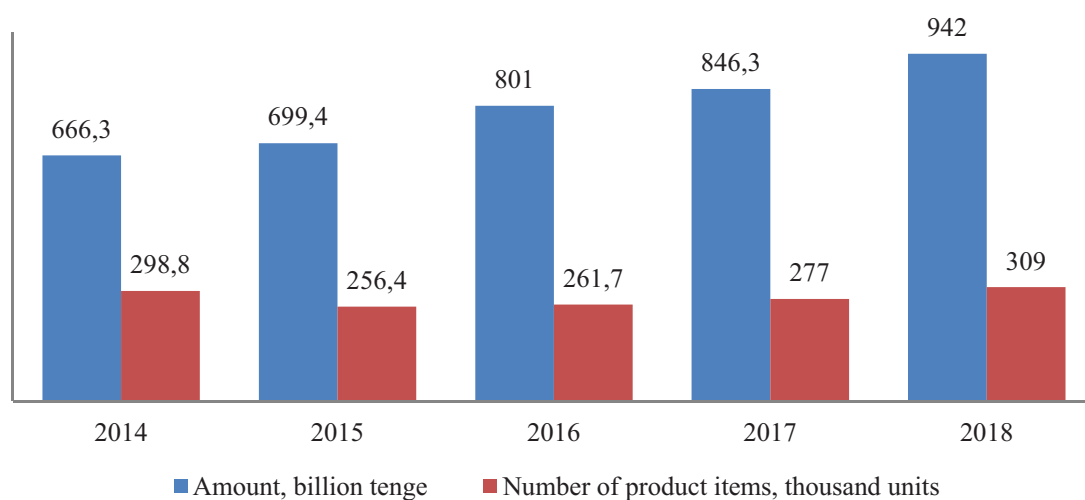


Figure 1 – Total imports for the period 2014-2018

Note – Compiled by authors on the based on source [7].

The largest volume of demanded goods falls on the machine-building industry – 6,502 commodity items worth 194.7 billion tenge, the second place is occupied by Metalworking – 1,602 commodity items worth 101.5 billion tenge and in third place – the chemical industry - 830 commodity items worth 32.4 billion tenge [8].

According to the list of the most popular products, 68.5 % is imported products (276.8 billion tenge), and the remaining 31.5 % is carried out by suppliers/ distributors of the Republic of Kazakhstan (see figure 2).

Accordingly, we can identify the top 10 countries in terms of imports in value terms:

- Russian Federation (58.5 billion tenge);
- United States of America (28 billion tenge);
- Great Britain (24.5 billion tenge);
- Sweden (20.3 billion tenge);
- Switzerland (18.6 billion tenge);
- France (15.7 billion tenge);
- China (12.6 billion tenge);
- United Arab Emirates (9.7 billion tenge);

- Germany (9.2 billion tenge);
- Italy (8.3 billion tenge);

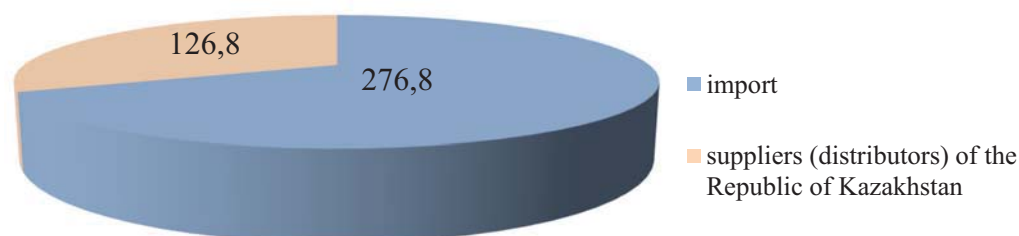


Figure 2 – List of demanded goods, billion tenge

Note – Compiled by authors on the based on source [9].

According to the results of the analysis, there are about 9985 demanded commodity items imported from third countries in Kazakhstan. According to the existing database of certificates of the “ST-KZ” form, 6593 items (66%) of them can potentially be produced at 248 domestic enterprises. 6500 of these positions belong to the engineering industry [9].

Before talking about the current situation of promising industries and development problems in the development of promising and competitive industries, it is important to consider the current state of industrial production in Kazakhstan over the past 10 years, using available statistical indicators.

During the period of implementation of two industrialization programs in 2010-2018, there was a positive trend in the development of the manufacturing industry, the volume of production increased from 3.8 trillion tenge in the base year 2010 to 10.4 trillion tenge in 2018, or 2.7 times, in nominal terms. The average annual growth rate of the index of physical volume of the manufacturing industry in the specified period was 4 % and increased, in total, by 42 % (2018 to the level of 2009). This is twice as high as in the mining sector (21 %).

The structure of manufacturing output for 2018 continues to be dominated by metallurgy (44.4 %), in 2010 – 41.5 %, there is a slight decrease in the share of food production (from 18.1 % to 14.7 %), slightly increased the share of mechanical engineering (from 9.8 % to 10.5 %), chemical industry (2.7 % to 3.9 %). The specific weights of other industries have not changed much.

Over the past 10 years, high growth rates of Kazakhstan's manufacturing industry have been provided mainly by expanding the country's participation in world commodity markets (base metals and materials) [10].

The level of capacity utilization of manufacturing enterprises on average is 44%-58%.

The main reasons for underutilization of domestic manufacturing enterprises are:

- 1) lack of funds for working capital for upgrading facilities;
- 2) insufficient interest on the part of the customer to domestic manufacturers;
- 3) insufficiency or lack of trained personnel to work on special equipment;
- 4) problems with raw materials;
- 5) payment terms for delivered products.

There is no collaboration between manufacturing enterprises and producers of finished high-quality raw materials. In this regard, the country is highly dependent on imported raw materials and components, which critically affects the competitiveness of domestic producers [11].

In order to stimulate the development of priority sectors of the economy and state support for industrial and innovative activities in the Republic of Kazakhstan, an industrial and innovative system has been formed, which consists of:

- 1) entities authorized to implement state support measures (national management holdings, national companies and their regional representatives and representative offices, national development institutions);

- 2) infrastructure (FEZ (free economic zone), IZ (industrial zones), technoparks, etc.)
- 3) tools (more than 100 tools in total, both at the national and regional levels).

The established system of development institutions and a relatively wide range of state support measures, in General, allows us to cover the needs of subjects of industrial and innovative activity at different stages of development. The analysis shows that the most popular are measures of state support to stimulate demand (including purchases of the state and quasi-public sector), tax and customs benefits, land allocation and connection to infrastructure, tools of “DBK” JSC (“Development Bank of Kazakhstan” join-stock company), the Entrepreneurship Development Fund “DAMU”, “Kazakh Export” JSC.

Today, Kazakhstan provides a wide range of state support measures for the development of entrepreneurship, which in General allows covering the needs of business at different stages of development – 90 of the 100 existing tools are provided in the Business code of the Republic of Kazakhstan [12].

Operator functions to provide measures of state support of manufacturing industry in the framework of the State program of industrial-innovative development of Kazakhstan for 2015-2019 years in the period complied with the subsidiary “National Managing Holding “Baiterek” JSC (“Development Bank of Kazakhstan” JSC, “Development Bank of Kazakhstan-Leasing” JSC, “Export insurance company “Kazakh Export” JSC, the Entrepreneurship Development Fund “Damu”), and development institutions (“National company “Kazakh Invest” JSC, national chamber of entrepreneurs “Atameken” (since 2018), as well as “Kazakhstan center for industry and export “QazIndustry” JSC [13].

In General, the existing mechanisms do not allow for a comprehensive and in-depth analysis of the effectiveness of state support measures.

To date, there is no systematic work to collect and consolidate information on the support measures provided.

Operators use different periods and forms of monitoring the performance of entities, taking into account the timing of providing tools (for medium - and long-term periods).

However, this work identifies the following strengths and weaknesses of support measures, as well as existing opportunities and threats to the company's operations (see table 1).

Table 1 – SWOT-analysis of support measures provided in the Republic of Kazakhstan

STRENGTHS	WEAKNESSES
Significant support from the state; A wide range of financial and non-financial support tools for businesses in various sectors of the economy; The focus of the country's economic policy in the last decade remains the manufacturing industry; Availability of natural resources.	A weak system of monitoring and analysis of the results of enterprises' activities (in terms of production, sales and exports, job creation, and payment of taxes to the budget); Lack of coordination and coherence between various government agencies and development institutions; Low initial technological and managerial level of enterprises, technological backwardness; Shortage of highly qualified technical personnel;
OPPORTUNITIES	THREATS
Competitive manufacturing industry of the Republic of Kazakhstan in the domestic and foreign markets; Development of new types of production for the development of added value within the market and export; Technological development and digitalization of industries.	Increased competition in the sphere of innovation development among developing countries; Consolidation of the raw material orientation of the economy due to high growth in raw material prices; Changing priorities in public policy; Increasing competition from foreign high-tech companies.
Note – Compiled by the authors	

Today, there is a low activity of large enterprises to cooperate with domestic producers in the framework of import substitution.

The solution to this problem may be to consider the possibility of implementing counter-requirements in relation to large enterprises. All existing support tools and benefits for large and medium-sized businesses are offered exclusively in exchange for counter-obligations (localization, export, productivity, etc.) by entering into an appropriate contract with the company.

At the same time, system-forming enterprises will receive support if they provide access to basic raw materials at competitive prices for domestic producers [14].

This mechanism has been actively used in the Russian Federation since 2015, which has helped to increase the number of enterprises by 2 times during the sanctions period and expand the range of products with a high share of localization [15].

To supply new types of products to large enterprises, domestic producers undergo qualified selection, and the products themselves are subjected to industrial tests. At the same time, passing the selection from one company does not guarantee the possibility of delivery to others, in addition, a positive test does not guarantee the ability of domestic producers to supply products within a group of companies.

The solution to this problem may be to consider the possibility of mutual recognition of the qualification of suppliers between large enterprises.

Low activity of domestic producers to establish production of new types of products in the framework of import substitution due to the lack of guaranteed sales. Guaranteed sales can be provided by entering into an offtake agreement. However, large enterprises refuse to enter into offtake contracts because it is impossible to determine the final cost of products based on the results of the project [16].

The signing of “off-take” contracts of subsoil users (the customer) with domestic producers directly affects the increase in the level of competitiveness of Kazakh enterprises, since this agreement guarantees them a stable order from the customer. This interaction affects the share of local content and its increase.

In such cooperation, both parties benefit from a guaranteed volume of products in the appropriate quality and acceptable price.

RESEARCH RESULTS AND CONCLUSIONS

Thus, within the framework of the work carried out and on the basis of statistical data, as well as surveys of domestic enterprises, barriers to the development of existing production facilities and localization of new, potential projects were identified, as well as proposals for their elimination and provision of state support measures within the framework of existing programs were developed.

Thus the following barriers were identified:

- finding financial resources for the development of new types of products. According to the criteria of the Unified business support and development program “business Road map 2020” (hereinafter - the Program), the Program participants cannot be entrepreneurs whose founders are national management holdings, national companies and organizations, fifty or more percent of the shares (shares in the authorized capital) of which directly or indirectly belong to the state, national management holding, national holding, national company.

- difficulties with registration of documents: obtaining land plots, preparation of design and estimate documentation, etc.

- for the production of new types of products, the technical characteristics of the products are required, as well as design and technological documentation

- lack of qualified personnel. Lack of experience in the production of certain products

- lack of financing, lack of working capital, lack of orders, high competition in the market, lack of guarantees

Proposals for removing barriers and implementing projects, as well as providing state support measures under existing programs are as follows:

- consider the possibility of participation of enterprises whose founders are national management holdings, national companies and organizations, fifty or more percent of the shares (shares in the authorized capital) of which directly or indirectly belong to the state, the national management holding, the national holding, the national company

- opportunity to reduce administrative barriers, eliminate “red tape”

- provision of state support measures within the framework of commercialization of technologies and design bureaus

- development of an action plan for improving the skills of workers. Dialogue with personnel of large and medium-sized businesses, analysis of the most popular specialties in all sectors

- explanation of state support measures, strengthening of interaction between national development institutions, in terms of organizing information and consulting activities to explain existing state support measure

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SUMMARY

This article discusses the development of small and medium-sized enterprises in Kazakhstan, describes the barriers that prevent the development of existing production facilities and suggests possible ways to eliminate

them. The strengths and weaknesses of state support measures, as well as opportunities and threats to the activities of enterprises, are identified.

ТҮЙІНДЕМЕ

Бұл мақалада Қазақстанда шағын және орта кәсіпкерлікті дамыту қарастырылады, қолданыстағы өндірістік қуаттардың дамуына кедергі келтіретін кедергілер сипатталған және оларды жоюдың ықтимал жолдары ұсынылған. Мемлекеттік қолдау шараларының күшті және әлсіз жақтары, сондай-ақ кәсіпорындардың қызметі үшін мүмкіндіктер мен қауіптер анықталды.

РЕЗЮМЕ

В данной статье рассматривается развитие малого и среднего предпринимательства в Казахстане, описаны барьеры, препятствующие развитию существующих производственных мощностей и предложены возможные пути их устранения. Определены сильные и слабые стороны мер государственной поддержки, а также возможности и угрозы для деятельности предприятий.

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STATE REGULATION OF INNOVATIVE DEVELOPMENT OF CITY AGGLOMERATIONS IN KAZAKHSTAN

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ABSTRACT

Purpose of the research is study the theoretical aspects of regulation process from the state and pace of innovation development of urban agglomerations, to develop recommendations to address and improve issues of transition to new qualitative level in the innovative development regulation of urban agglomerations.

Methodology – general scientific methods such as synthesis, analysis, comparison, and generalization.

The originality / value of the research is determined by studying the levels and effectiveness of public regulation of innovative development of urban agglomerations in Kazakhstan. The potential of urban agglomerations is associated with the use of opportunities for innovative and technological development in achieving state and regional goals.