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Analysis of the achievement of key tasks and indicators of state programs for the development of non-resource exports in Kazakhstan

Abstract: *Export has been taking a key role in a shaping economic agenda for the development of the country and enhancing competitiveness of the industries. This article reviews key state programme documents of promoting export and analyses achievement of their target indicators. Indicators are compared along with budget resources allocated for export promotion tasks and operators that convey support instruments. All analyzed state programs included target indicators and initiatives to promote domestic non-commodity export. To achieve these targets various measures and initiatives proposed in the last two decades. However, indicators often remained unachieved, as statistics on the volume of exports of the manufacturing industry investigated in the context of the programs' implementation period. The pool of main measures of state support for exports was formed during 2010s with minor changes in subsequent policy documents. It was revealed that the implementation of the programs was accompanied by a frequent change of operators for the provision of state support measures, which quite possibly had a negative impact on the failure to achieve target indicators.*

Keywords: *export promotion, state programme documents, trade policy, export support tools, trade indicators*

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Introduction

Export allows to achieve macroeconomic stability by reducing the sensitivity of the economy to internal and external shocks. Increasing resilience to macroeconomic imbalances is possible through diversification of production, which will increase non-commodity exports and reduce the dependence of domestic consumption on imports. Export is one of the key indicators of the competitiveness of the country's industries [1]. Exporting non-commodity companies not only generates foreign exchange earnings for the country, but also, thanks to competition in foreign markets, improves the quality of goods and services. That will reduce import and improve the country's trade balance.

Kazakhstan is trying to apply an effective industrial policy to obtain stable economic growth. The various national programs and government approaches that are examined in the current analysis have been adopted to achieve economic diversification. The industrial policy of Kazakhstan is focused on the development and support of priority sectors of the manufacturing industry. These programs made it possible to stop the decline in the share of the manufacturing sector. The next step should be to increase the share of the industrial sector in GDP. This requires the manufacturing sector to grow faster than the production of services, thereby increasing the share of the manufacturing sector in GDP.

Kazakhstan's economy is heavily dependent on the extractive industries and developing non-resource exports can help reduce this dependence and diversify the country's economic

base, making it more resilient to fluctuations in commodity prices. Non-resource exports can help increase the competitiveness of Kazakhstan's economy by creating new markets and opportunities for businesses. By expanding into new industries and product categories, Kazakhstani businesses can tap into new sources of growth and improve their competitiveness in the global marketplace. Therefore, by pursuing an effective policy of promoting non-resource export the country can enhance its economic competitiveness and support its long-term development.

While the role of export in an economy pattern of Kazakhstan is prominently highlighted, few studies available on the analysis of state programmes on the achievement export indicators. To close this gap the current paper aims to rigorously examine key state programmes related to export promotion on a chronological basis.

What are the previous studies on the development of programme documents for export promotion

For up-to-date information and analysis on the achievement of key objectives and indicators of state programs for the development of non-commodity exports in Kazakhstan, this paper refers to the latest publications, reports and studies available on official sources and specialized platforms.

There have been a number of studies conducted on the development of program documents for export promotion in different countries. Some of these studies have focused on best practices for developing these documents, including analysing the content and structure of successful export promotion programs [1], as well as identifying key factors that contribute to their success [2]. Other studies have focused on specific industries or regions, evaluating the impact of export promotion programs on trade and economic development in those areas [3]. These evaluations aim to assess the effectiveness and impact of the programs and initiatives implemented by the government to support export development. Such evaluations are important for understanding the strengths and weaknesses of the current export promotion programs, and for making informed decisions on future actions and initiatives.

Reports from international organizations such as the World Bank, the Organization for Economic Co-operation and Development (OECD) and other international institutions analyzes the development of countries, including trade policies. In the report devoted to Kazakhstan OECD focuses on various government approaches to support exports, including financial assistance, trade and economic agreements and promotion of international partnerships. Experts pay special attention to the transparency of policies and support instruments in relation to exporters [4].

Research focus on export strategies and export sector development in developing countries. Some late studies research the impact of world markets on exports: analysis of external factors such as world trade wars, changes in prices for goods and services that can affect export volumes [5].

One of the works that studied in detail the implementation and realization of state programs was the article of Dulambayeva [6], where she evaluated the results of programs in terms of industrial policy.

Yet it should be mentioned that abovementioned studies not particularly deepened into key parameters and details of state programmes. Moreover, there is no analysis of the effectiveness of government export programs: This may include an assessment of the implementation of the goals set, the results achieved and the impact of programs on the country's economy.

Therefore, the literature reveals studies that specify the positive effects of export for Kazakhstan [7] and a key role of export diversification [8]. However, research is needed in the analysis of program documents related to export promotion in Kazakhstan. Therefore, the purpose of this study is to analyze the effectiveness and results of the state programme documents of Kazakhstan in the field of export diversification.

From the practical perspective, evaluations of this research can inform the development of new and improved programs, as well as the modification of existing programs, to better support the growth of Kazakhstan's exports.

Methodology

A chronological comparative analysis has been applied to examine the export promotion program documents of Kazakhstan. This approach involves comparing the different program documents over time, in terms of their goals, budget and tools. This type of analysis allows for a comprehensive understanding of the evolution of export promotion policies in Kazakhstan and how they have changed and adapted over the years in response to new challenges and opportunities.

It has to be noted that tables and overviews in the results section are compiled and designed by authors, by means of rigorous analysis of all available sources and statistics. Since literature and reports over state programmes are not systematic, results were first adopted in a chronological order and then analyzed.

Sources include official government reports on the implementation of state programs for the development of non-commodity exports, official documents that can contain valuable information and analysis on the results achieved, academic research and articles in different languages, reports of international organizations, economic journals and publications and other relevant materials.

The chronological comparative analysis can help identify trends, patterns, and best practices in export promotion, and can inform decision-making on future policy directions. By comparing the volumes of export for the manufacturing industry of different programs, it is possible to assess the effectiveness of specific policies and to identify areas where improvements and changes for future documents could be made. This type of analysis can also provide insight into the impact of external factors, such as changes in the global economy or shifts in markets on Kazakhstan's export promotion efforts.

The first diversification program was the Strategy for Industrial and Innovative Development of Kazakhstan for 2003-2015 (hereinafter - SIID). However, due to the crisis of 2007-2009, the program was suspended. After it, several more systemic programs on trade and industrial policy were approved and carried out: the State Program of Accelerated Industrial and Innovative Development for 2010-2014 (hereinafter - SPAIID) and the State Program of Industrial and Innovative Development for 2015-2019 (hereinafter - SPIID1). At the moment, the State Program for Industrial and Innovative Development for 2020-2025 (hereinafter - SPIID2), which was approved in 2019, is being carried out. In 2021, the Ministry of Trade and Integration planned to introduce a sectoral state program for the development of trade with an emphasis on export promotion. However, the reform of the national system for the preparation of policy documents through the creation and implementation of national projects led to the fact that part of the concept of the Trade Policy Development Program was reflected in the 5th direction of the national project «Sustainable economic growth aimed at improving the welfare of Kazakhstanis» (hereinafter - the National Project), approved by the Government Decree Republic of Kazakhstan dated October 12, 2021 No. 730.

To assess the effectiveness of state programs, measures and initiatives on trade and industrial policy, the above programs regulating state support for exporters were analyzed with a description of state institutions and their tools. Moreover, a statistical analysis was also carried out on export indicators across the years of state programmes.

Results

2.1 The Strategy for Industrial and Innovative Development of Kazakhstan for 2003-2015

Approaches to the industrial and innovative development of the Republic of Kazakhstan were formed in 2003 within the framework of the SIID, where the growth in volume and expansion of the geography of non-primary exports were one of the fundamental goals of this document [9].

The key event of this program in terms of export support is the creation of a state export insurance corporation, for which 7.7 billion tenge was allocated. In 2003, in accordance with the Decree of the Government of the Republic of Kazakhstan, JSC «State Insurance Corporation

for Insurance of Export Credits and Investments» («KazExpoGarant») was established, which provided domestic exporters with insurance coverage against political and commercial risks in foreign markets.

In 2003, by Decree of the Government of the Republic of Kazakhstan No. 775, a national development institute was established - JSC «Center for Marketing and Analytical Research», which since 2007 has become known as the «KAZNEX Export Development and Promotion Corporation». The purpose of this institute was to conduct a detailed analysis of international markets, industries and sectors of the economy, identify the main development trends and identify the competitive advantages of Kazakhstan. It should be noted that the creation of this institute was not mentioned in the SIID.

One of the main economic goals of the strategy is to ensure the sustainable development of the economy by reducing dependence on the export of resources, developing new non-primary industries and expanding the export of finished products.

Table 1

High-level overview of key SIID indicators 2003-2015

Program	Tasks	Operators	Instruments	Amount of financing, mln. tenge
SIID 2003-2015*	-increasing the share of the manufacturing industry in the structure of GDP up to 13% by 2015 - increasing exports of non-commodity goods by 2015 to 28-30% of all exports, expanding the range of export goods and diversifying the geography - development of specific global advantages of Kazakhstan in order to form corporate leaders - Ensuring accelerated growth of the SME sector - development of innovative entrepreneurship	«KazExpoGarant»	Export credit insurance	7 700
			Trade liberalization	

*Due to the crisis of 2007-2009, SIID was suspended

Source: Compiled by the authors based on Strategies for industrial and innovative development Republic of Kazakhstan for 2003-2015

Table 1 shows the key tasks of the SIID. This document was systemic in nature and included a wide range of issues on the industrial development of the country, but the subsequent crisis of 2007-2009 suspended its implementation. In her study, Fadeikina [10] made a conclusion that due to the scale of the programme SIID had no clear target values. Despite the suspension of the program, the geography of exports increased from 109 countries in 2003 to 122 countries in 2010. In addition, exports of non-primary goods increased significantly, as shown in Table 2.

Table 2

The volume of exports of the manufacturing industry 2003-2010

	2003	2010
	Export, mln US dollars	Export, mln US dollars
Agriculture	142.7	827.1
Industrial products	3 551.1	13,905.8

Source: Bureau of National Statistics of the Agency for Strategic Planning and Reforms of the Republic of Kazakhstan and ITC TradeMap

There is no official documents and report of the results of this programme, so authors evaluate its export performance by dynamics in statistics. From 2003 to 2010, the export of agricultural goods increased 5.8 times: from 142.7 million US dollars to 827 million US dollars. Exports of manufactured goods also showed significant growth, increasing by 3.7 times (from 3.5 billion US dollars to 13.9 billion US dollars).

During the beginning of the 2000s the state programmes aimed at increase in oil and gas production via raw materials complex. Additionally, as shown in table 2, from 2003 there was a significant rise of industrial products export.

2.2 The State Program of Accelerated Industrial and Innovative Development for 2010-2014

The return to an active industrial-innovation policy took place in 2010 within the framework of the SPAIID for 2010-2014, which was largely based on the principles and approaches of the SIID 2003-2015.

In order to stimulate domestic exports of non-commodity (processed) goods and services, the SPAIID allocated more than 22 billion tenge for the implementation of key measures to form a comprehensive and aggressive export promotion system shown in Table 3.

Table 3

Key tasks of SPAIID 2010-2014

Program	Tasks	Operators	Instruments	Amount of financing, mln tenge
SPAIID 2010-2014	<ul style="list-style-type: none"> - strengthen the activities of JSC «National Agency for Export and Investment «KazNexInvest» by creating a comprehensive and aggressive export promotion system - provide information and expert support - provision of financial support to exporters - assistance to exporters in accessing distribution channels in target markets 	KazExpoGarant	Export Insurance	16,340
		«KazNexInvest»	Financing the program to support exporters, Export promotion, organization of TEM, exhibitions Analytical support, Reimbursement of part of the costs	5 950

Source: Compiled by the authors based on State program for accelerated industrial and innovative development of the Republic of Kazakhstan for 2010-2014

Within the framework of the SPAIID, measures and initiatives to support exporters were strengthened. The measures were implemented through two key institutions – «KazExportGarant» and «KazNexInvest». The program laid the foundation for a pool of export support tools that is still in place today [11].

In order to systematically support the development of the export potential of Kazakhstani producers, since 2010, the Export Development and Promotion Program «Export 2020» began to be implemented, which provided for new areas of support for the development of Kazakhstani exports: reimbursement of expenses of enterprises to promote exports, service support - organization of trade and exhibition events for domestic enterprises. Thus, within the framework of the SPAIID, exporters were able to reimburse the costs associated with transportation costs, advertising in foreign markets, participation in foreign exhibitions, registration of products, trademarks abroad, certification of products abroad.

It should be noted that funds from the republican budget in the amount of 5.9 billion tenge for the implementation of the above «KazNexInvest» instruments were disbursed within the framework of the SPAIID from 2010 to 2014. The amount of financing in the amount of 16.3 billion tenge, allocated to «KazExportGarant» for the period 2010 - 2014.

Table 4

Evaluation of efficiency (achievement of some target indicators) of SPAIID 2010-2014

№	Indicators	2008 (base year)	2014	2014 to 2008		Authors' notes
				Plan	Fact	
1	GDP in real terms - by 38.4% compared to 2008, in nominal terms - by 26 trillion tenge	16.1	39	38.4%	+35.6%	Despite the growth of the indicator, the plans were not achieved
2	GVA of the non-primary sector in real terms - by 39.5% compared to 2008, trillion tenge	11.8	28.9	39.5%	+36.8%	
3	GVA of the manufacturing industry in real terms - by 43.6% compared to 2008, trillion tenge	1.8	3.8	43.6%	+27.8%	
4	Cost volume of non-commodity (processed) exports - by 30% by 2008, billion US dollars	20.1	18.5	30%	-8%	There is a decrease in the indicator, the plan is not fulfilled

Source: Compiled by the authors based on State program for accelerated industrial and innovative development of the Republic of Kazakhstan for 2010-2014

As shown in Table 4, following the results of the Program implementation, despite the failure to achieve the target indicators, the GVA indicators of the non-resource sector and the manufacturing industry showed a positive development trend: an increase of 36.8 and 27.8%, respectively, compared with the data of 2008. The indicators of labor productivity in the manufacturing industry and the reduction in the energy intensity of GDP were fully implemented within the framework of the SPAIID activities. However, the key indicator - achieving a 30% increase in the value of non-primary exports by 2008 was not achieved. At the end of 2014, the volume of non-commodity exports amounted to USD 18.5 billion, which is 8% lower than in 2008. As a result, out of 12 target indicators, the achievement of planned indicators is observed in 4 indicators (3 indicators related to the increase in the share of local content in the purchases of state institutions and organizations and the indicator of reducing the energy intensity of GDP).

To understand the effect of the implementation of this program for the period 2010-2014, Table 5 shows export indicators.

Table 5

The volume of exports of the manufacturing industry 2010-2014

	2010	2014
	Export, mln. US dollars	Export, mln. US dollars
Agriculture	827.1	1 135.2
Industrial products	13,905.8	17,234.4

Source: Bureau of National Statistics of the Agency for Strategic Planning and Reforms of the Republic of Kazakhstan

From 2010 to 2014, the volume of exports of competitive agricultural goods increased by more than 1.4 times (from 827.1 million US dollars to 1,135.2 million US dollars), the export of industrial products, in turn, increased by 24%: from 13.9 billion US dollars to 17.2 billion US dollars.

Despite this increase in exports, reports state an unfavorable situation in developing according to the indicator on the share of non-resource exports in total exports. That led to SPAIID key indicators regarding to export unfulfilled [6].

2.3 The State Program of Industrial and Innovative Development for 2015-2019

SPIID 2015-2019 expanded the mechanisms for implementing state policy in the field of stimulating the export of manufacturing products. The program provides a set of measures aimed at the accelerated development of the export capacity of Kazakhstani producers. A feature of SPIID1 is not only an increase in the number of export support measures, but also an increase in the number of key institutions that act as operators of government measures.

Table 6

Key indicators of SPIID 2015-2019

Program	Tasks	Operators	Instruments	Amount of financing, mln tenge
S P I I D 2 0 1 5 - 2019	- Orientation to saturate the domestic market with quality products and export - Increase in production volumes and expansion of the range of processed goods - Increasing industrial capacity: stimulating the development of basic industries and the implementation of strategic projects - Technological development and digitalization of manufacturing industries	«KazakhInvest»	Reimbursement of exporters' costs	500
			Analytical support	-
			Service support	2 553
		«QazIndustry»	Reimbursement of exporters' costs	600
			«Atameken»	Reimbursement of exporters' costs
		Analytical support		-
		Service support		3 520
		Ministry of National Economy	Support in the EAEU regulations	2 647
		Development Bank of Kazakhstan	Concessional lending	357,000

Source: Compiled by the authors based on State Program of Industrial and Innovative Developments for 2015-2019

As shown in Table 6, during the period of implementation of the SPIID 2015-2019, the number of operators providing support tools to exporters increased [12]. Insurance and financial support continued to be provided by the only specialized insurance company acting as an export credit agency in Kazakhstan – «KazakhExport» that provides exporter credit insurance instruments, export trade finance and pre-export finance.

SPIID1 outlined the key role of the Promotion of export financing through the Development Bank of Kazakhstan JSC. Along with financing investment projects, the Bank provided services for financing export operations, including co-financing by providing loans to both a resident supplier of Kazakhstani products and a non-resident buyer of Kazakhstani products. During the implementation of SPIID1, the work of the «National Export and Investment Agency «KazNex Invest» was reformatted. Since March 2017, the organization was renamed to the National Company «Kazakh Invest» JSC and focused on the tasks of attracting foreign investment in priority sectors of the economy. The functions of providing analytical support to exporters and cost recovery operators for industrial and innovative entities producing domestic processed goods were transferred to «QazIndustry» JSC. Service support measures began to be implemented by the National Chamber of Entrepreneurs of the Republic of Kazakhstan «Atameken» [13]. Comparatively to the previous programmes, the performance of SPIID1 programme was analysed by various authors from different perspectives of industrialization [14, 15]. Nevertheless, results of the implementation of this programme from the export promotion perspective were not explicitly analysed.

Table 7

Fulfilment of SPIID target indicators in the manufacturing industry for the period 2015-2019

No	Target	Execution status
1	Growth in the value of exports of manufacturing products by 19% compared to 2015	Not fulfilled. At the end of 2019, the real growth in the value of exports of manufacturing products by 2015 amounted to 114.3%, which is 4.7% less than the planned value.
2	Real growth of labor productivity in the manufacturing industry by 22% in real terms compared to the level of 2015	Not fulfilled. The real growth in labor productivity in 2019 compared to 2015 is 111.7%.
3	The volume of investments in the fixed capital of the manufacturing industry in the amount of 4.5 trillion. tenge for 2015-2019	Fulfilled - plan for 2015-2019 overfulfilled by 6.8%.
4	Reducing energy intensity in the manufacturing industry by at least 7% compared to 2014	Fulfilled. At the end of 2015, energy intensity in the manufacturing industry was reduced by 9.9% from the 2014 level. (2016 - 12.5%, 2017 - 12.5%, 2018 - 12.7%, 2019 - 13.8%)

Source: Compiled by the authors on the basis of the State Program for Industrial and Innovative Development for 2015-2019

As a result of the implementation of the Program (Table 7), the target indicators of the volume of investments in fixed capital of the manufacturing industry and the reduction of energy intensity in the manufacturing industry by at least 7% compared to the level of 2014 were achieved. The target indicator of achieving growth in the value of exports of manufacturing products by 19% compared to 2015 was not met. The volume of exports of the manufacturing industry in 2015 amounted to 14 billion US dollars, and in 2019 the figure was 16 billion US dollars. Thus, the sales value increased by 14.3%, which is 4.7 percentage points lower than the planned figure of 19%. As a result, 2 out of 4 target indicators were achieved.

To understand the effect of the implementation of this program for the period 2014-2019, Table 8 calculates export indicators.

Table 8

The volume of exports of the manufacturing industry 2014-2019

	2014	2019
	Export, mln. US dollars	Export, mln. US dollars
Agriculture	1 135.2	1 127.4
Industrial products	17,234.4	14,576.4

Source: Bureau of National Statistics of the Agency for Strategic Planning and Reforms of the Republic of Kazakhstan

From 2014 to 2019, the volume of exports of processed agricultural goods decreased slightly (from 1,135.2 million US dollars to 1,127.4 million US dollars), industrial exports, in turn, decreased by 15% (from 17.2 billion US dollars to 14.6 billion US dollars).

As stated in studies, due to a global crisis and fall of prices for mineral resources that could be a reason for a downtrend happened to export data of Kazakhstan [6].

2.4 The State Program for Industrial and Innovative Development for 2020-2025 and the National Project «Sustainable Economic Growth Aimed at Improving the Welfare of Kazakhstan»

In order to form a competitive manufacturing industry in the domestic and foreign markets, the SPIID 2020-2025 (SPIID2) was developed in 2019. Table 9 shows the target indicators for this program.

Table 9

Target indicators of SPIID-2

№	Target indicators	unit of measurement	2018, Fact	2019, grade	Forecast					
					2020	2021	2022	2023	2024	2025
1.	Real productivity growth in manufact.	% to the previous year	104.7	108.7	108.0	107.4	106.9	106.5	106.1	105.7
		% by 2018	100.0	108.7	117.4	126.2	134.9	143.6	152.3	161.1
2.	Growth in manufact. exports	% to the previous year	101.1	107.9	109.4	109.7	109.8	109.8	109.3	109.7
		% by 2018	100.0	107.9	118.1	129.5	142.2	156.1	170.7	187.2
3.	Index of the physical volume of investments in fixed assets of the manufact. industry	% to the previous year	119.7	56.8	131.4	123.9	119.3	116.2	113.9	112.2
		% by 2018	100.0	56.8	74.6	92.4	110.2	128.0	145.8	163.7

№	Target indicators	unit of measurement	2018, Fact	2019, grade	Forecast					
					2020	2021	2022	2023	2024	2025
4.	Increasing the number of operating manufact. enterprises per 1000 active population	to the level of 2018. times	1.00	1.07	1.13	1.20	1.26	1.33	1.39	1.52
5.	Economic Complexity Index (Harvard), ranking	Point (place)	-0.31 (78)	-0.25 (76)	-0.18 (74)	-0.12 (70)	-0.05 (64)	0.01 (61)	0.08 (59)	0.14 (55)

Source: Compiled by the authors on the basis of the State Program for Industrial and Innovative Development for 2020-2025

The target indicator for the growth in the volume of exports of the manufacturing industry by 1.9 times, compared to the level of 2018, is similar in format to those of the SPAIID and SPIID1. The indicator of the volume of exports of the manufacturing industry in 2020 amounted to 15.5 billion US dollars and shows a negative trend compared to 2018 and 2019 (15.7 and 15.8 billion US dollars, respectively), which may be due to the global pandemic. According to the Bureau of National Statistics of the Agency for Strategic Planning and Reforms of the Republic of Kazakhstan, the volume of non-commodity exports increased significantly and reached 17.9 billion US dollars in 2021. The growth of exports of the manufacturing industry by 2018 amounted to 24.1% with a target indicator of 29.5%.

As part of the SPIID2, an important target indicator was adopted - an increase in the position of Kazakhstan in the Economic Complexity Index (Harvard) from 78 to 55 levels (from -0.31 points to 0.14 points). The improvement in this indicator is correlated with an increase in the export rate of a wider range of goods that are not exported by other countries.

In addition, the target indicator for increasing non-commodity exports to 41 billion US dollars by 2025 is reflected in the fifth direction of the national project «Sustainable economic growth aimed at improving the welfare of Kazakhstanis» (National project). On the basis of this document, an ecosystem for the development and promotion of exports was formed, based on the interaction of the MTI RK, as the main conductor of state policy in the field of development and promotion of non-commodity exports, with sectoral ministries, as well as development institutions in the field of development and export promotion. It is likely that this program will replace SPIID2 in the coming years. An important difference between SPIID2 and the National Project is that the National Project does not provide for a rating of the economic complexity index (Table 10).

Table 10

Key indicators of the National Project

Indicators	2021	2022	2023	2024	2025
Indicator 1. Share of non-commodity exports in total foreign trade, %	39.6%	41.1%	42.6%	44.2%	45.7%
Indicator 2. Increase in the number of active exporters up to 1,000, units with accumulation	435	545	650	760	880
Indicator 3. Share of modernized testing laboratories in the total number of testing laboratories	3%	8%	13%	20%	30%

Source: Compiled by the authors on the basis of the national project «Sustainable economic growth aimed at improving the welfare of Kazakhstanis»

The key financial institution for export support, «KazakhExport», continued to support domestic exporting enterprises in the manufacturing sector.

The financial measure to reimburse part of the costs of exporters and all non-financial measures to support exporters - service support, consulting and analytical support for exporters, previously provided by «Qazindustry» JSC and NCE «Atameken», were transferred to «QazTrade» Trade Policy Development Center» JSC («QazTrade»). «QazTrade» also served two newly initiated programs - the export acceleration program (a comprehensive support for exporters with consulting and service tools with the ultimate goal of finding a foreign buyer for a domestic exporter) and e-commerce promotion programme. It is worth noting that key indicators for increasing non-commodity exports and financing of support tools for achieving these goals are presented in both programs - SPIID2 and the National Project.

Discussion

A retrospective analysis of the implementation of state industrial development programs showed the evolution of the formation of institutional support for domestic exporters. Over the past two decades, a base of state support for exports has been created in Kazakhstan, including a network of development institutions. SIID has laid the institutional framework for exporter promotion, designed to give potential and existing exporters the necessary competencies and provide them with support in the implementation of foreign supplies. The pool of main measures of state support for exports was formed during the SPAIID with minor changes in subsequent policy documents. Figure 1 shows foreign trade support instruments that are aimed at strengthening the role of the manufacturing industry and increasing non-commodity exports. It should be noted that the implementation of the programs was accompanied by a frequent change of operators for the provision of state support measures, which quite possibly had a negative impact on the failure to achieve target indicators.

No	Instruments	2003-2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	# operator changes
1	Export insurance			KazExpoGarant					Kazakh Export							2
2	Reimbursement of expenses			KAZNEX INVEST				KAZAKH INVEST		Atameken		QazIndustry		QazTrade		5
3	Export acceleration													QazTrade	-	
4	Bringing enterprises to international electronic platforms													QazTrade	-	
5	Consulting and analytical support for exporters			KAZNEX INVEST				KAZAKH INVEST		Atameken				QazTrade		4
6	Modernization of the laboratory base, technical regulation, accreditation													CTRM	-	
7	Concessional lending and pre-export financing								BRK							-
8	Export service support			KAZNEX INVEST				KAZAKH INVEST		Atameken				QazTrade		4
9	Creation/expansion of testing laboratories								Ministry of National Economy							-

Figure 1 – Instruments and operators for the development of industry and exports for the period 2003-2022

Source: Compiled by the authors on the basis of the State programs for the development of the manufacturing industry and exports

In our opinion, the main goal of the country's industrial policy should be to increase the export of more complex manufactured products, which will increase the overall complexity of the export basket. Exporting companies not only generate foreign exchange earnings for the country, but also, thanks to competition in foreign markets, improve the quality of goods and services in the local market (economies of scale and learning by trading arguments). The export of complex non-primary goods brings more knowledge and experience (scientific, technical or manufacturing) to the country, increases productivity growth in other sectors of the economy (elevator industry argument) and allows the economy to grow at a faster pace (unconditional convergence argument). All of the above state programs included target indicators and initiatives to promote domestic non-commodity exports (Tables 1, 3, 7, 10).

These target indicators for increasing exports are reasonable. However, the analysis of the achievement of target indicators revealed that within the framework of all program documents, indicators related to an increase in the value of non-commodity exports were not met. The SIID program was suspended: based on the results of the SPAIID, it was planned to increase the value of non-primary exports by 30%, while in 2014 the figure decreased by 8%. According to the results of the SPIID, in 2019, the growth in the value of exports of manufacturing products compared to the base year 2015 amounted to 14.3%, instead of the planned increase by 19%.

Currently, there are 2 programs aimed at increasing the export of non-resource products - SPIID2 and the National Project. Within the framework of these programs, 2 new instruments were added to the existing pool of measures - export acceleration and bringing domestic producers to international e-commerce channels. As part of the implementation of the National Project, it is planned to increase the volume of non-primary exports to 41 billion US dollars in 2025 (exports of non-primary goods from 16 to 29 billion US dollars and services from 5 to 12 billion US dollars). Among the target indicators of the SPIID2, it is also envisaged to improve the country's position in the index of economic complexity of the export basket. However, within the framework of the National Project, this indicator is absent, that is, if SPIID2 is replaced by the National Project, the program for diversifying the country will not have an indicator showing progress in the manufacturability of the country's production structure.

What can be observed is the fact that programmes above did not cover consideration of the problems and obstacles that companies face when trying to enter world markets, as well as an assessment of the measures taken by the state to eliminate them. Moreover, contemporary

economists mention the importance of the analysis of the impact of innovations and new technologies on the development of exports, as well as the role of the state in stimulating innovation. Hopefully, these topics can be further investigated in future research.

Conclusion

Thus, over the past two decades, a base has been created in Kazakhstan for conducting state support for exports, based on the application of the most modern measures from international experience.

Over the past 20 years, Kazakhstan has pursued an active export policy aimed at diversifying exported goods, expanding markets, attracting foreign investment and improving infrastructure.

As part of the implementation of government programs, a wide range of support measures for exporters were presented, such as financial incentives, assistance in obtaining certifications, training and consulting.

Literature review revealed the lack of rigorous studies on the analysis of the results for export state policies. Therefore, in order to evaluate the achievement of key tasks and indicators of state programs for the development of non-resource exports this study applied chronological analysis of measures, instruments, budgets and conducted statistical analysis across the years.

Results revealed that within the framework of trade and industrial policies for the period 2010-2019, plans to increase the value of exports have never been achieved. It is most likely that the goals changed over the course of the programmes. In this regard, the time horizon of state support should be planned. For development of a new complex programmes, a longer period is needed to define key parameters with annual confirmation of achievement intermediate goals via public reports. Moreover, it was noted that a frequent change of public institutions providing export support do not positively affect the export growth.

From the practical perspective, the topic of export targets has critical implications for the economy of Kazakhstan, thus for the broader community.

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Қазақстанда шикізаттық емес экспортты дамытудың мемлекеттік бағдарламаларының негізгі міндеттері мен көрсеткіштерінің орындалуын талдау

Аңдатпа. Экспорт ел дамуының экономикалық күн тәртібін қалыптастыруда және салалардың бәсекеге қабілеттілігін арттыруда шешуші рөл атқарады. Мақалада экспортты дамытудың мемлекеттік бағдарламаларының негізгі құжаттары қарастырылып, олардың мақсатты индикаторларына қол жеткізуге талдау жасалған. Көрсеткіштер экспортты ілгерілету міндеттеріне бөлінген бюджет қаражатымен және қолдау құралдарын ұсынатын операторлармен салыстырылады. Талданған барлық мемлекеттік бағдарламалар мақсатты индикаторлар мен отандық шикізаттық емес экспортты дамыту бастамаларын қамтыды. Осы мақсаттарға жету үшін соңғы екі онжылдықта түрлі шаралар мен бастамалар ұсынылды. Дегенмен, бағдарламаны іске асыру кезеңдері контекстінде зерттелген өңдеуші өнеркәсіп экспортының көлемі туралы статистикалық мәліметтер көрсеткендей, көрсеткіштер жиі орындалмай қалды. Экспортты мемлекеттік қолдаудың негізгі шараларының пулы 2010 жылдары кейінгі бағдарламалық құжаттарға аздаған өзгерістер енгізіліп қалыптасты. Бағдарламаларды іске асыру мемлекеттік қолдау шараларын көрсету бойынша операторлардың жиі ауысуымен қатар жүретіні анықталды, бұл өз кезегінде нысаналы индикаторларға қол жеткізуге кері әсерін тигізуі мүмкін.

Түйін сөздер: экспортты ынталандыру, мемлекеттік бағдарламалар, сауда саясаты, экспортты қолдау құралдары, сауда көрсеткіштері.

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Анализ достижения ключевых задач и показателей государственных программ развития несырьевого экспорта в Казахстане

Аннотация. Экспорт играет ключевую роль в формировании экономической повестки дня для развития страны и повышения конкурентоспособности отраслей. В статье рассмотрены основные документы государственных программ развития экспорта и проанализировано достижение их целевых показателей. Показатели сопоставляются с бюджетными средствами, выделяемыми на задачи по продвижению экспорта, и операторами, предоставляющими инструменты поддержки. Все проанализированные государственные программы включали целевые индикаторы и

инициативы по развитию отечественного несырьевого экспорта. Для достижения этих целей в последние два десятилетия были предложены различные меры и инициативы. Однако показатели зачастую оставались недостижимыми, как показывают статистические данные по объему экспорта обрабатывающей промышленности, исследованные в разрезе периодов реализации программ. Пул основных мер государственной поддержки экспорта был сформирован в 2010-х годах с небольшими изменениями в последующих программных документах. Выявлено, что реализация программ сопровождалась частой сменой операторов по оказанию мер государственной поддержки, что, вполне возможно, негативно сказалось на достижении целевых показателей.

Ключевые слова: стимулирование экспорта, государственные программы, торговая политика, инструменты поддержки экспорта, показатели торговли.

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