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### WAYS TO INCREASE THE INVESTMENT ATTRACTIVENESS OF KAZAKHSTAN'S ECONOMY

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**Abstract.** In modern conditions of global competition, increasing investment attractiveness is one of the main tasks of Kazakhstan's economic policy. In this regard, investments occupy an important place in the country's economy. The article discusses current aspects of increasing the investment attractiveness of the economy of Kazakhstan. The authors analyze the dynamics of foreign direct investment, the structure of sources of financing, as well as regional and sectoral features of investment activity. The main attention is paid to institutional and macroeconomic factors affecting the investment climate: administrative barriers, availability of funding, and legal protection of investors. The article pays special attention to proposals to stimulate investment through economic diversification, infrastructure development and improvement of the regulatory framework. The gross inflow of foreign direct investment in Kazakhstan by country is analyzed in comparison with the actual statistical data for the last 3 years. In addition, an analysis of the gross inflow of direct investment in Kazakhstan by the volume of foreign investment, the dynamics of changes in investment attractiveness and types of economic activity was carried out. The article reflects the main trends identified during the analysis of investments in fixed assets and analyzes the actual volume of investments in fixed assets in the areas of use. This study shows approaches to the formation of an effective system for attracting investment, taking into account modern challenges.

The authors will make a number of proposals on ways to increase the investment attractiveness of the economy of Kazakhstan.

**Keywords:** investments, investment attractiveness, investment climate, investment risk, foreign direct investment, investment financing

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## **ҚАЗАҚСТАН ЭКОНОМИКАСЫНЫҢ ИНВЕСТИЦИЯЛЫҚ ТАРТЫМДЫЛЫҒЫН АРТТЫРУ ЖОЛДАРЫ**

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**Аннотация.** Қазіргі жаһандық бәсекелестік жағдайында инвестициялық тартымдылықты арттыру Қазақстанның экономикалық саясатының басты міндеттерінің бірі болып табылады. Осы ретте ел экономикасында инвестициялар маңызды орын алады. Инвестор ел экономикасына инвестициялау кезінде аумақтың инвестициялық тартымдылығын оның кірістілігі мен тәуекелділігі тұрғысынан бағалайды. Мақалада Қазақстан экономикасының инвестициялық тартымдылығын арттырудың ағымдағы аспектілері қарастырылады. Авторлар тікелей шетелдік инвестициялардың динамикасын, қаржыландыру көздерінің құрылымын, сондай-ақ инвестициялық қызметтің аймақтық және салалық ерекшеліктерін талдайды. Инвестициялық ахуалға әсер ететін институционалдық және макроэкономикалық факторларға: әкімшілік кедергілерге, қаржыландырудың қолжетімділігіне, инвесторларды құқықтық қорғауға басты назар аударылады. Мақалада экономиканы әртараптандыру, инфрақұрылымды дамыту және нормативтік-құқықтық базаны жетілдіру арқылы инвестицияны ынталандыру жөніндегі ұсыныстарға ерекше назар аударылған. Статистикалық мәліметтер мен халықаралық рейтингтерді талдау негізінде Қазақстанда тұрақты және тартымды инвестициялық кеңістікті қалыптастыру бойынша практикалық ұсыныстар тұжырымдалған. Қазақстан экономикасын сипаттайтын негізгі макроэкономикалық көрсеткіштер: елдер бойынша Қазақстанға тікелей шетелдік инвестициялардың жалпы ағыны 3 жылдық нақты статистика-

лық деректермен салыстырмалы түрде талданады. Сонымен қатар, шетелдік инвестициялардың көлемі, инвестициялық тартымдылықтың өзгеру динамикасы мен экономикалық қызмет түрлері бойынша Қазақстанға тікелей инвестициялардың жалпы ағынына талдау жасалды. Мақалада негізгі капиталға салынған инвестицияларды талдау барысында анықталған негізгі тенденциялар көрсетіледі және пайдалану бағыттары бойынша негізгі капиталға инвестициялардың нақты көлемі талданады. Бұл зерттеу заманауи сын-қатерлерді ескере отырып, инвестиция тартудың тиімді жүйесін қалыптастырудың тәсілдерін көрсетеді. Авторлар Қазақстан экономикасының инвестициялық тартымдылығын арттыру жолдарына бірқатар ұсыныстар береді.

**Түйін сөздер:** инвестиция, инвестициялық тартымдылық, инвестициялық ахуал, инвестициялық тәуекел, тікелей шетелдік инвестициялар, инвестицияны қаржыландыру

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## ПУТИ ПОВЫШЕНИЯ ИНВЕСТИЦИОННОЙ ПРИВЛЕКАТЕЛЬНОСТИ ЭКОНОМИКИ КАЗАХСТАНАМ

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**Аннотация.** В современных условиях глобальной конкуренции повышение инвестиционной привлекательности является одной из основных задач экономической политики Казахстана. В то же время инвестиции играют важную роль в экономике страны. Инвестируя в экономику страны, инвестор оценивает инвестиционную привлекательность территории с точки зрения ее доходности и риска. В статье рассматриваются актуальные аспекты повышения инвестиционной привлекательности экономики Казахстана. Авторы анализируют динамику прямых иностранных инвестиций, структуру источников финансирования, а также региональные и отраслевые особенности инвестиционной активности. Основное внимание уделяется институциональным и макроэкономическим факторам, влияющим на инвестиционный климат: административным

барьерам, доступу к финансированию и правовой защите инвесторов. В статье рассматриваются предложения по стимулированию инвестиций посредством диверсификации экономики, развития инфраструктуры и совершенствования нормативно-правовой базы. На основе анализа статистических данных и международных рейтингов сформулированы практические рекомендации по формированию устойчивого и привлекательного инвестиционного пространства в Казахстане. Проанализированы основные макроэкономические показатели, характеризующие экономику Казахстана: общий приток прямых иностранных инвестиций в Казахстан по странам в сравнении с фактическими статистическими данными за последние 3 года. Кроме того, был проведен анализ общего притока прямых инвестиций в Казахстан по объему иностранных инвестиций, динамике изменения инвестиционной привлекательности и видам экономической деятельности. В статье выделены основные тенденции, выявленные в ходе анализа инвестиций в основной капитал, а также проанализирован фактический объем инвестиций в основной капитал по направлениям использования. В данном исследовании показаны пути создания эффективной системы привлечения инвестиций с учетом современных вызовов. Авторы дают ряд рекомендаций по повышению инвестиционной привлекательности экономики Казахстана.

**Ключевые слова:** инвестиции, инвестиционная привлекательность, инвестиционный климат, инвестиционный риск, прямые иностранные инвестиции, инвестиционное финансирование

**Introduction.** The investment attractiveness of a country is determined by a set of economic, institutional, political and legal factors that create favorable conditions for capital investment. Kazakhstan, as a country with high natural resource potential, as well as scientific potential, can be attractive to foreign investors. However, there are a number of factors that inhibit investment in the economy of Kazakhstan. Investment affects the country's economic growth, the development of infrastructure and technologies. The methodological basis for the formation of investment attractiveness is based on classical and modern economic theories, including neoclassical investment theory, institutional economics and M. Porter's theory of competitive advantages. Foreign scientists who studied and contributed to the development of the following areas of stimulating investment in the country's economy and regulating the sources and directions of investment attraction for enterprises: V.E. Leontiev, V.V. Bocharov, N.P. Radkovskaya, (Leontiev, 2023: 34-41). Also, a number of authors Grishina I.V., Tryasitsina define investment attractiveness as a component of the investment climate, while others believe that investment attractiveness depends on the investment climate. Investment climate can be considered as the conditions of investment activity in a country or region that affect the profitability of investments and the level of investment risks. The more favorable the investment climate of a country or region, the more attractive the territory for investment (Tryasitsina, 2019: 99-103).

Attracting investments is competitively advantageous for a company and is often the most powerful tool for growth. The main goal of attracting investments is to increase the efficiency of the enterprise's activities. Therefore, the result of any chosen method of investing in the competent management of investment funds should be an increase in the company's value and other indicators of its activities. Investment attractiveness is important for investors, since analyzing the enterprise and its investment attractiveness allows you to minimize the risk of inappropriate investment. In the context of globalization and increased competition for international capital, investment attractiveness is becoming one of the main factors of sustainable economic development. For countries with a developing economy, such as Kazakhstan, attracting foreign direct investment plays an important role in updating production capacities, creating new jobs, transferring technologies, and diversifying the economy. Despite significant natural resource potential, favorable geographical location, and progressive reforms in recent years, Kazakhstan still faces a number of challenges that limit investment flows (Askinadzi, 2020:95-98).

The main problems include insufficient institutional stability, excessive administrative barriers, limited access to financing, and weak legal protection for investors. In this regard, the need to develop effective strategies and tools aimed at increasing the country's investment attractiveness is urgent. The study is aimed at identifying priority areas of state policy that will contribute to creating a favorable investment climate in Kazakhstan and activating investment activity.

**Materials and methods.** As part of the implementation of the tasks of increasing the volume of investments in the economy of Kazakhstan, the Government is strengthening cooperation with international financial organizations. In this regard, drafts of the National Infrastructure Plan until 2029 have been considered. For the successful implementation of achieving economic growth and sustainable development, technical and expert support from partners will be required. Work is underway on six large joint projects for a total loan amount of \$3.74 billion with co-financing from the republican budget of \$611.7 million. This year, as a result of the implementation of investment projects, work was carried out on the reconstruction of highways in a number of regions, modernization of secondary education facilities, customs posts, and improvement of irrigation and drainage systems in the southern regions of the Republic of Kazakhstan. The EBRD portfolio in Kazakhstan includes 125 active projects totaling \$2 2.95 billion, most of which belong to the fixed infrastructure sector. Investments in the private sector reached 46%. The expected volume of investments by the Eurasian Development Bank by the end of 2024 will be at least 1 billion US dollars. Agreements have been signed on the following projects: reconstruction of national highways; reconstruction of Almaty CHP-3; construction of a thermal power plant (wind power plant) in the Karaganda region; expansion of the Astrakhan-Mangyshlak main water pipeline. Projects in the social, energy and transport sectors, modernization of highways worth 2.5 billion US dollars are being considered. In addition, active cooperation is being carried out with the Islamic Development Bank and the Arab Coordination Group, which intend to finance 30

infrastructure projects in Kazakhstan for more than 7 billion US dollars this year (Doszhanov, 2024: 2-4).

The country's investment potential can be considered in terms of political, economic, resource-raw materials, and other factors. The investment attractiveness of Kazakhstan also reflects macroeconomic factors related to the development of production and innovation in the country. The resource-based sector in Kazakhstan is attractive to foreign investors. Investors are particularly interested in the energy, transport and logistics, metallurgy and renewable energy sectors. However, an economy based on export raw materials is unstable, as the economy depends on revenues from the export of energy resources, which means it is directly linked to oil and gas prices. In addition, in Kazakhstan, issues such as predictability of legislation, a skilled workforce, and effective interaction with government agencies are key objectives for investors.

**Results and discussion.** According to the World Bank and other international rating agencies, the country shows an average moderate level of investment attractiveness. According to the report of the UN Economic and Social Commission for Asia and the Pacific (ESCAP) on investments in the region for 2024, Kazakhstan became the leader in attracted investments in the North and Central Asian region, attracting 15.7 billion US dollars to new projects. In terms of investment in Kazakhstan, compared to 2023, the growth in the last 2024 amounted to 88%. Kazakhstan accounts for 63% of all attracted investments in the region. Despite the global situation (negative impact), Kazakhstan is attracting large foreign investors, becoming a platform for stable growth and new opportunities. This year, the country hosted major investment events - the Council of foreign investors and the Kazakhstan round table on global investment - 2024, which strengthened Kazakhstan's position as the main investment direction of the region (Sultanbekova, 2025: 1-3).

The manufacturing industry of Kazakhstan is in a positive dynamic direction, according to the results of 2023, the volume of production in this industry increased by 4% and amounted to 22 trillion tenge, while in 2024 this figure was 5.1%. The main drivers of this growth were the furniture industry +17.9%, chemical industry +9.5%, metallurgy +8.3% and mechanical engineering +4.2%. At the same time, there is a decrease in imports by 7.2%, which indicates an increase in the competitiveness of domestic products. This year, 592 long-term offtake contracts worth 703.5 billion tenge were implemented, which will ensure stable orders for Kazakhstani enterprises.

In addition, Kazakhstan encourages the development of the manufacturing industry through investment projects. In particular, in 2024, it is planned to launch 180 investment projects worth 1.3 trillion tenge, which will create 14.9 thousand jobs. 56 investment projects worth 283.1 billion tenge have already been launched, which provides about 3.8 thousand permanent jobs. In addition, the infrastructure of special economic zones (SEZs) is actively developing. Within the framework of the SEZ, 372 investment projects were implemented, more than 27.7 thousand jobs were created and 730 billion tenge of foreign direct investment was attracted. These measures are aimed at creating a favorable investment climate and supporting domestic

producers, which will contribute to the growth of the economy of Kazakhstan and the improvement of business conditions (Central Bank of investment in 2024: 1-2).

In Kazakhstan, about half of the total volume of national capital investments is carried out by large and medium-sized enterprises.

Table 1- Investments in fixed assets by the size of the enterprise, thousand tenge

Years	Investment in fixed assets mastered	Including:		
		Small enterprises	Medium-sized enterprises	Large enterprises
2023	17 649 312 955	9 214 174 745	1 230 475 888	7 204 662 322
2024	19 374 965 647	11 134 310 174	1 898 027 121	6 342 628 352

Note: On investments in fixed assets in the Republic of Kazakhstan in 2024.

In 2024, about half of the volume of capital investment is accounted for by large (6,342,628,352 thousand tenge or -13.6% compared to last year) and medium-sized (1,898,027,121 thousand tenge or +54.5%) enterprises. Investments of small businesses in 2024 increased by 20.8% and amounted to 11,134,310,174 thousand tenge.

66.4% of the total cost was accounted for work on the construction and overhaul of buildings and structures, about 30% of the total - the purchase of machines, equipment and vehicles.

The priority sources of financing for investments are own funds of business entities, the volume of which in 2024 amounted to 12,487,861,011 thousand tenge or 64.4% of the total volume.

Financing of the real sector of the economy in the total amount of investments in fixed assets for the banking sector is 741,437,838 thousand tenge or 3.8%. The share of budget funds amounted to 4,098,379,916 thousand tenge or 21.2% of all investments, which is 16.7% higher than in the previous 2023.

Table 2 - Investments in fixed assets by sources of financing

	2024		2023
	Thousand tenge	%	%
Total investments in fixed assets	19 374 965 647	100,0	100,0
Including by sources of financing:			
State budget	4 098 379 916	21,2	16,7
Own funds (equity)	12 487 861 011	64,4	72,2
Bank loans	741 437 838	3,8	2,9
Including:			
Loans from foreign banks	138 150 709	0,7	0,3
Other borrowings	2 047 286 882	10,6	8,2
Including:			
Borrowing instruments from non-residents	572 683 573	3,0	2,9

Note: On investments in fixed assets in the Republic of Kazakhstan in 2024. <https://stat.gov.kz/ru/industries/business-statistics/stat->

The main source of investment financing remains the own funds of enterprises, which account for 64% of the total. This value indicates that the financial stability of companies directly affects the dynamics of investment in the economy. In the face of a slowdown in economic growth and a decrease in business income, they are not inclined to invest in development and modernization. At the same time, the state's activity in stimulating investment activity has increased, especially in the context of low activity in the private sector (Alpysbaeva, 2020: 12-16). In the period from 2013 to 2023, investments in fixed assets increased three times—from 6 to 18 trillion tenge. At the same time, the share of investments in fixed assets in the gross domestic product decreased by 1.8%, that is, from 16.9% to 15.1%.

In 2023, investments in fixed assets in Kazakhstan amounted to 18 trillion tenge, which is 13.7% more than in the previous 2022 (15.2 trillion tenge). In 2023, the total inflow of foreign direct investment to Kazakhstan amounted to 23.4 billion US dollars, which decreased by 16.9% compared to 2022. The inflow of net foreign direct investment has halved, from US 6 6.5 billion to US.3.2 billion. More than half of the investment growth was provided by an increase in IFC in energy (+39%), transport and warehouses (+40%), information and communication technologies (2.3 times), and healthcare (51%). At the same time, 34% of investments in transport, energy and healthcare are provided at the expense of the state budget (1.4 out of 4.1 trillion tenge) (1.4 out of 4.1 trillion tenge). The growth in investment in the information and communication technology sector can be explained by the investment of telecommunications companies in the development of 5G technologies. Thus, over the past 10 years, the share of foreign direct investment has decreased by 14.6%, and therefore from 33.5% to 18.9%. The reason for the decline in investment is due to the completion of the construction of large oil and gas projects in the western regions. In the course of the analysis of investments in fixed assets, the following main trends are identified: a decrease in the share of investments in fixed assets in GDP, a decrease in the share of foreign investment, a low level of participation of second-tier banks in lending to fixed assets, dependence on raw materials and weak regional diversification.

At the same time, the gross inflow of Foreign Direct Investment (FDI) in the economy of Kazakhstan for the period from 2013 to 2023 amounted to about 246.9 billion US dollars, of which 102.5 billion US dollars are accounted for by the mining industry (including 83.7 billion US dollars in the oil and gas industry). In 2024, the volume of investments in fixed assets amounted to 19,374,965 million tenge, which indicates an increase of 7.5% compared to 2023. However, at the same time, the share of investments in fixed assets in relation to GDP fluctuates at 15%, which is one and a half times lower than the government's goal of 23% by 2029. In this case, we note the need to reorient the current model of the economy and reduce dependence on raw materials. In 2024, the main share of investments in fixed assets was 39.7% in industry (including mining and quarrying – 18.9%, manufacturing – 10.7%), real estate operations-19.1%, transport and warehousing - 18.1%, rural Forestry and Fisheries-4.7% (<https://stat.gov.kz/>).



The growth of IFI (physical volume index) investments in fixed assets is observed in a number of Regions: Karaganda by 61%, Zhetysu by 43.1%, Pavlodar by 38.3%, Turkestan by 37.4%, Almaty by 31%, North Kazakhstan by 23.9%, Kyzylorda by 21.7%. Accordingly, the decline in IFI investments in fixed assets is observed in Atyrau by 28.1%, Aktobe by 13.4%, Akmola by 8.9%, Zhambyl by 6.1%, Mangistau by 4.4% and Ulytau by 3.5%. The results of the comparative analysis show that a significant share of investments is occupied by Atyrau region with 11.2%.

Table 3 - Investments in fixed assets in the areas of Use, million tenge

Sectors	2021 ж.	2020 ж-%,	2022 ж.	2021 ж-%,	2023 ж.	2022ж-%,	2024 ж.	2023 ж-%
Total:	13 242 233	103,7	15 251 104	109,2	17 649 313	111,2	19 374 965	107,5
Including:								
Agriculture, forestry, and fisheries Industry	772 475	133,2	850 346	106,3	904 264	101,7	919 007	98,9
Industry	6 500 085	100,7	7 380 078	107,6	7 939 230	103,3	7 688 547	94,9
Construction	126 672	97,1	223 242	171,9	129 421	57,7	149 117	114,5
Transportation and storage	1 472 265	109,3	1 725 317	114,8	2 675 960	148,8	3 500 195	126,6
Information and communication	147 419	84,9	192 395	127,3	438 366	223,4	306 409	68,4
Financial and insurance activities	95 862	117,6	119 660	118,3	117 327	94,2	161 089	134,5
Real estate operations	2 597 289	117,1	2 939 762	110,9	3 164 494	103,3	3 703 834	113,4
Professional, scientific, and technical activities	68 507	63,1	60 297	83,4	90 389	144,0	130 596	141,5
Education	282 907	92,6	374 200	129,3	436 902	112,3	1 098 203	243,3
Healthcare and social services	187 287	60,2	260 666	136,3	436 441	160,8	442 163	98,1

Note: <https://stat.gov.kz/ru/industries/business-statistics/stat-invest/>

According to experts, the growth rate of investment slowed down compared to 2022 and 2023, when there was an increase of 15.2% and 15.7%, respectively. In general, this is the expected slowdown after the peak of the "post-coronavirus". Thus, the results of the analysis show that the growth rate of investments in fixed assets in Kazakhstan is slowing. This indicates the general weakness of investment activity in the economy, the low level of profitability of new capital attracted due

to a number of economic circumstances, and the lack of long-term plans for further business expansion.

The main reason for the weak growth is a significant decrease in investment in industry, that is, in the mining industry, where the volume of investment decreased by 29.3%. At the same time, the mining industry remains the most important segment, accounting for 22% of all investments. Negative dynamics are observed not only in the mining industry, but also in other key sectors of the economy. The decrease in the volume of investments in agriculture continues, that is, according to the results of the first half of 2024, the decrease was 20%. The main reason for this decline was the deterioration of the financial situation of the peasants in 2023, caused by a lack of grain, which limited their investment opportunities in the current period. However, a record harvest is expected in 2025, which should significantly improve the financial situation in agriculture. This, in turn, creates the prerequisites for the restoration and growth of capital investments in the industry, which will accelerate the modernization of agricultural production and increase its efficiency in the future (Veliev, 2025.).

In 2023, there was also a reduction in construction and trade – investment fell by 16.8% and 8.7%, respectively. Capital expenditures in the construction sector show negative growth rates in 2023 (129,421 million tenge or 57.7%), despite the fact that the sector itself is actively expanding and plays an important role in the economy. This gap can lead to increased caution between companies and a further decline in demand. The volume of capital investments in the information and communication sector decreased significantly: by about a third, to 306,409 million tenge in 2024, a decrease of -31.6% compared to last year. The dynamics of investment in the information and communication sector is growing at a high pace, although it has slowed down from +117.8% to 68.4%. This growth is associated with the active development of digital infrastructure and the introduction of advanced technologies into the economy. An important factor that encourages increased investment is the introduction of a 5G network, which will require significant costs for upgrading equipment and expanding coverage. The expansion of this economic sector will have a positive impact on the digital transformation of various sectors of the economy, such as industry, transport, education and health.

Capital investments in the transport and warehousing sector continue to grow rapidly, increasing by 26.6% in 2024 compared to 2023. The main driver of this growth is the active development of trade and logistics chains, which contributes to an increase in demand for Transport and warehouse services. Increasing the volume of cargo transportation, expanding logistics infrastructure and modernizing transport systems will require significant investments, which will further stimulate the growth of investment in this area (Central Bank of the Republic of Kazakhstan investment in 2024).

In 2024, the minimum investment volume was in the areas of Professional, Scientific and technical activities (130,596 mln), construction (149,117 mln), financial and insurance activities (161,089 mln). However, compared to the previous 2023, these industries increased in 2024: professional, scientific and technical activities - by 41.5%, construction - by 14.5%; financial and insurance activities - by 34.5%.

In 2024, the gross inflow of Foreign Direct Investment (FDI) to Kazakhstan amounted to 17.1 billion US dollars. US dollars, which is a decrease of 28.4% compared to 2023. It should be noted that FDI inflow has been decreasing for the second year in a row, in general, in 2023 (US.23.9 billion) decreased by 15.2% (US. 28.2 billion in 2022). At the same time, in accordance with the concept of Kazakhstan's investment policy until 2029, FDI inflows in 2024 increased by 5.1% to 24.8 billion US dollars. It was supposed to grow to the US dollar, but the current situation has shown a significant decrease in the investment attractiveness of Kazakhstan on the world stage.

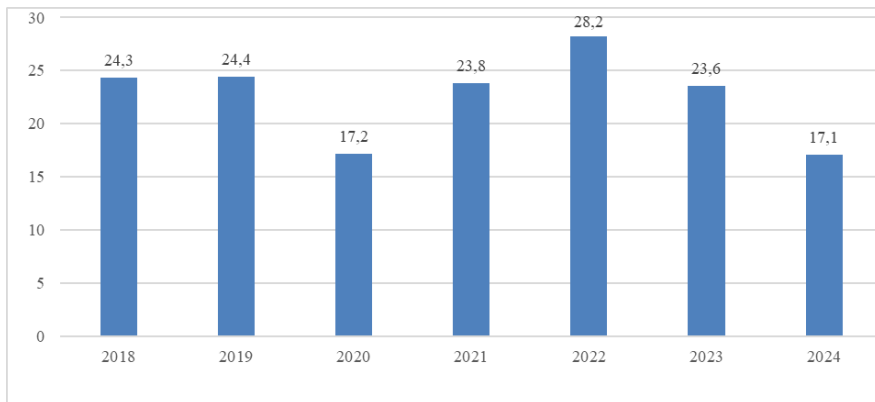


Figure 1. Gross inflow of foreign direct investment, in Billion US dollars  
Note: Statistics from the Ministry of Finance of the Republic of Kazakhstan

In general, the decline in the volume of foreign direct investment is observed in 11 out of 15 sectors of the economy. The reduction in the inflow of foreign direct investment decreased in the mining industry to -24.9% (-2145.6 million US dollars), the manufacturing industry -47.3% (-2540.9 million US dollars). The volume of the real estate operations sector in 2023 amounted to 379.3 million US dollars, while in 2024 it decreased by minus -560.0 million US dollars. At the same time, there is an outflow of direct investment abroad by types of economic activity of residents, that is, there are industries in which investors have withdrawn their investments. Thus, in 2024, the total outflow of investors' funds in the transport and logistics sector amounted to 126.8 million US dollars, and in the financial and insurance sector-953.5 million US dollars. The inflow of FDI by type of economic activity was a plus (+) only in 4 industries. In particular, the inflow of FDI to wholesale and retail trade increased by 107.0% to 7.0% or 347.1 million US dollars, the information and communications sector increased by 51.0% or 193.4 million US dollars, professional, scientific and technical services-by 148.5 or 547.7 million US dollars, the Sewerage and waste disposal sector-by 45.6% or 4.7 million US dollars (<https://stat.gov.kz/>).

The total inflow of direct investment to Kazakhstan from foreign direct investors by type of economic activity of residents is given in the following table.

Table 4. Gross inflow of direct investment in Kazakhstan by type of economic activity

Name of type of activity	2022	2023	2024	Өсім %, +/-
	million US dollars			2024/2023
Total	28 171	23 986	17 162	71,5 (-28,5)
Agriculture, forestry, and fisheries	32,5	49,5	26,1	52,7 (-47,3)
Mining and quarrying	12 080,0	8 626,8	6 481,2	75,1 (-24,9)
Manufacturing	5 554,2	5 378,7	2 837,8	52,7 (-47,3)
Construction	702,3	1 031,1	289,6	28,0 (-72,0)
Wholesale and retail trade	5 251,8	4 990,0	5 337,1	107,0
Transportation and storage	1 173,6	1 119,5	170,1	15,2 (-84,8)
Accommodation and food services	104,6	161,8	16,6	10,2(-89,8)
Information and communication	394,7	378,5	571,9	151,0
Financial and insurance activities	650,6	937,7	485,9	51,5 (-48,5)
Real estate operations	102,7	379,3	-560,0	-
Professional, scientific, and technical activities	1 250,7	368,8	916,5	248,5
Education, healthcare, and social services	60,5	38,1	30,1	79,0(-21,0)
Sewerage and waste management	11,6	10,3	15,0	145,6

Note: <https://www.nationalbank.kz/ru/news/pryamyie-investicii-po-napравleniyu-vlozheniya>

For real estate transactions in the 4th quarter of 2024 – (-625.5 million US dollars) will go to minus.

As for the dynamics of FDI flows by investor countries, the situation is not so clear. Some countries have significantly reduced the inflow of investment in Kazakhstan, while others have increased it. Of the top - 20 investor countries, the largest decline in total FDI inflows in 2024 was shown by Kazakhstan's main partner, The Netherlands: over the year it decreased by 35.7% (or 2117.9 million US dollars). At the same time, a significant decrease in FDI flows in 2024 in Switzerland fell to -80.0% (or -1729.6 million US dollars). FDI inflow from China increased by -41.8% (or -855.7 million US dollars), from Germany -29.5% (or -227.1 million US dollars). US dollars), up -81.6% from the UAE (or -749.3 million US dollars). US dollars). According to these countries, we see the total inflow of foreign direct investment in Kazakhstan, that is, the 20 best investors ( in Million US dollars) in the table.

Table 5. Gross inflow of foreign direct investment in Kazakhstan by country

Countries	2022	2023	2024	Growth rate %, +/-	
	million US dollars			2024/2022	2024/2023
Total	28 171	23 986	17 162	60,9	71,5
Netherlands	8 462,3	5 934,0	3 816,1	45,0	64,3
Russia	1 543,1	3 055,1	4 050,2	262,4	132,6
Belgium	1 560,5	1 006,1	1 205,7	77,3	120,0
South Korea	1 488,5	1 175,1	1 222,9	82,1	104,0
China	1 432,7	2 046,9	1 191,2	83,1	58,2
France	770,2	884,5	843,3	109,4	95,3
Singapore	405,1	457,5	709,8	175,2	155,1
Cyprus	454,7	497,6	777,3	171,0	156,2

United Kingdom	661,8	794,5	723,7	109,3	91,0
Switzerland	2 762,7	2 169,0	439,4	16,0	20,0
Luxembourg	200,1	424,5	520,5	260,1	122,6
Turkey	380,1	434,0	597,9	157,3	137,7
UAE (United Arab Emirates)	416,7	918,5	169,2	40,6	18,4
Germany	469,4	770,3	543,2	115,7	70,5
Japan	333,8	404,0	468,6	140,3	116,0
Canada	190,0	201,5	146,4	77,0	72,65
Poland	75,0	86,1	88,7	118,2	103,0
Denmark	28,0	53,7	77,3	276,0	144,0
Virgin Islands	233,3	75,6	561,3	240,6	742,0
India	25,8	30,3	51,0	197,6	168,3

Note: <https://www.nationalbank.kz/ru/news/pryamye-investicii-po-napravleniyu-vlozheniya>

So, the global trends for the countries of the world are as follows: in 2024, the volume of foreign direct investment in the world will grow by 11% and amount to about 1.4 trillion US dollars. However, if we exclude flows through European economies, the volume of global FDI will decrease by 8% in a year. According to global experts, this reduction threatens progress in achieving the UN Sustainable Development Goals, which rely mainly on financing international projects (Rakhmetulina, 2024).

In the period from 2021 to 2024, the economy of Kazakhstan shows stable positive dynamics in terms of key indicators of investment attractiveness, despite individual fluctuations caused by internal and external factors.

Table 6 - Comparative analysis of the investment attractiveness of the economy of Kazakhstan

Indicators	2021	2022	2023	2024	Trend
Foreign Direct Investment, billion USD	23,8	28,2	23,6	17, 1	Growth with a slight decrease in 2023
GDP growth, %	4.3	3.2	5.1	4.8	Steady growth
Inflation, %	8.4	18.8	10.8	8.6	Decline after a surge
Global Competitiveness Index (WEF) rank	58	55	52	50	Positive dynamics
Investment attractiveness ranking (FDI Intelligence / fDi Markets)	68	63	59	55	Improvement
Number of implemented investment projects	190	225	248	270	Growth
Average business registration time (days)	6.1	5.3	4.7	4.0	Simplification of procedures
Economic freedom level (Heritage Foundation)	63.2	64.5	65.7	66.5	Steady improvement
Rule of Law Index (World Justice Project)	0.48	0.50	0.52	0.54	Gradual increase in trust in institutions
Investor confidence level (based on surveys and indexes)	Average	Average	Above average	High	Growth

Note: <https://www.nationalbank.kz/ru/news/pryamye-investicii-po-napravleniyu-vlozheniya>

The foreign direct investment fund fell from US 2 23.8 billion in 2021 to US.17.1 billion in 2024. Despite a slight decline in 2023, in general, there is an upward trend, which indicates the restoration of trust on the part of international investors and the attractiveness of national projects. Gross domestic product (GDP) growth remained positive for the entire period, declining slightly in 2022 due to the global economic and geopolitical crisis. Growth rose to 5.1% in 2023 and stabilized at 4.8% in 2024, which indicates the stability of macroeconomic policy. According to inflation, after a sharp increase in inflation in 2022 as a result of external crises (up to 18.8%), it showed a steady downward trend in the next 2023-2024, which will have a positive effect on the investment climate and reduce risks for investors (<https://stat.gov.kz/>). According to international ratings and positions, Kazakhstan is improving its position in international ratings for competitiveness and investment attractiveness. From 2021 to 2024, the country rose from 58th to 50th place in the Global Competitiveness Index ranking and continues to rise in the FDI Intelligence ranking, reflecting the positive perception of the country by the international business community.

The level of institutional conditions, a reduction in the time required to register a business from 2021 to 2024 (from 6.1 to 4 days), an increase in the level of economic freedom and the rule of law indicate an improvement in the business environment, a decrease in bureaucratic barriers and a strengthening of institutions. This is especially important for long-term investors focused on sustainability and predictability. As part of the reforms and macroeconomic stabilization in Kazakhstan, the level of investor confidence has significantly increased: from "average" in 2021 to "high" in 2024 (according to expert estimates and International Studies). This factor indirectly confirms the success of the state's economic policy in the field of investment. In the period from 2021 to 2024, Kazakhstan shows a steady improvement in the investment climate, despite inflationary and geopolitical difficulties. The greatest progress was seen in institutional and regulatory aspects (reduction of administrative barriers, growth of Economic Freedom, legal stability). This creates favorable conditions for attracting long-term capital. Thus, proposals to increase the investment attractiveness of the economy of Kazakhstan:

To improve the legal and institutional framework, to ensure the stability and predictability of legislation, especially in the areas of taxation, customs regulation and protection of investors' rights. It is also important to strengthen anti-corruption measures.

Economic diversification: stimulating the development of non – resource sectors-agriculture, industry, tourism, IT and renewable energy sources. This will reduce dependence on the export of raw materials and make the economy more stable. Actively promoting the investment image of the country: improving the marketing of Kazakhstan as an investment direction by participating in international forums,improving ratings and forming an open dialogue with foreign investors.

**Conclusion.** The investment policy of Kazakhstan is under the attention of the government and is the main tool for stimulating the country's economic development. In general, the Government of Kazakhstan is consistently implementing reforms

aimed at removing administrative and legislative barriers, but they can negatively affect the development of investment processes and the investment climate in the country. Increasing investment attractiveness requires a systematic approach aimed not only at removing existing barriers, but also at creating competitive advantages in the global economy. The steady growth of key economic indicators, increasing transparency and improving positions in global rankings indicate the country's growing potential as a promising investment direction in Central Asia. At the same time, the three main growth factors, namely integration into the world economy, intensive innovative activity and the transition to "green" technologies, should increase the attractiveness of Kazakhstan to investors. To do this, we need such areas of reform as improving the conditions for doing business in Kazakhstan, opening up human resources, developing an initiative approach to the process of attracting investment.

In conclusion, it should be noted that increasing the investment attractiveness of the economy of Kazakhstan requires an integrated approach, which includes improving the institutional environment, ensuring transparency and predictability of legislation, infrastructure development, innovation and small business support. Special attention should be paid to strengthening investor confidence through effective protection of property rights and judicial reform. Only by creating a stable, competitive and favorable business climate, Kazakhstan can attract sustainable and long-term investments that contribute to economic diversification and sustainable development of the country.

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