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SOCIAL ENTREPRENEURSHIP IN KAZAKHSTAN: CURRENT STATE, SUPPORT MECHANISMS AND DEVELOPMENT DIRECTIONS

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Abstract. The study is relevant given the growing role of social entrepreneurship as a tool to address socially significant problems, expand employment opportunities for socially vulnerable groups, and shape a more inclusive model of economic development in Kazakhstan. Despite the regulatory establishment of social entrepreneurship and the active expansion of the state support system, the sector's further development is hindered by financial, institutional, and regional constraints. The study aims to provide a comprehensive assessment of the current state of social entrepreneurship in the Republic of Kazakhstan, to analyse the effectiveness of existing state support mechanisms, and to identify promising directions for its further development. The empirical basis consisted of data from the national register of social entrepreneurship entities, official statistics on employment and entrepreneurship, regulatory and legal documents, and the results of an author's survey of 200 social entrepreneurs conducted in April–May 2026. The study applied descriptive statistics, time series analysis, spatial and cluster analyses, Likert-scale rating assessments, factor analysis using the principal component

method, and elements of socio-economic modelling. It has been established that between 2021 and 2026, the number of social entrepreneurship entities increased from 45 to 1,780, indicating a high rate of institutionalisation in the sector. At the same time, significant regional concentration has been identified: 29% of social enterprises are concentrated in Astana and Almaty. The main barriers are limited access to financing (78% of respondents), lack of awareness (65%), and bureaucratic procedures (58%). State grants and interest rate subsidies are recognised as the most effective forms of support. The practical significance of the results lies in the justification of measures to promote social investment, digitalisation of support, intersectoral partnership, and differentiated regional policy.

Keywords: social entrepreneurship, social enterprises, state support, inclusive economy, sustainable development, Kazakhstan

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ҚАЗАҚСТАНДАҒЫ ӘЛЕУМЕТТІК КӘСІПКЕРЛІК: ҚАЗІРГІ ЖАҒДАЙЫ, ҚОЛДАУ ТЕТІКТЕРІ ЖӘНЕ ДАМУ БАҒЫТТАРЫ

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Аннотация. Зерттеудің өзектілігі әлеуметтік маңызы бар проблемаларды шешу, халықтың әлеуметтік осал топтарын жұмыспен қамтуды кеңейту және Қазақстанның экономикалық дамуының неғұрлым инклюзивті моделін қалыптастыру құралы ретіндегі әлеуметтік кәсіпкерліктің өсіп келе жатқан

рөліне байланысты. Әлеуметтік кәсіпкерлік институтының нормативтік бекітілуіне және мемлекеттік қолдау жүйесінің белсенді кеңеюіне қарамастан, сектордың одан әрі дамуы қаржылық, институционалдық және өңірлік шектеулермен шектеледі. Зерттеудің мақсаты Қазақстан Республикасындағы әлеуметтік кәсіпкерліктің қазіргі жай-күйін кешенді бағалау, мемлекеттік қолдаудың қолданыстағы тетіктерінің тиімділігін талдау және оны одан әрі дамытудың перспективалық бағыттарын айқындау болып табылады. Эмпирикалық негізді әлеуметтік кәсіпкерлік субъектілерінің ұлттық тізілімінің деректері, жұмыспен қамту және кәсіпкерлік жөніндегі ресми статистика, Нормативтік-құқықтық құжаттар, сондай-ақ 2026 жылғы сәуір-мамыр айларында жүргізілген 200 әлеуметтік кәсіпкердің авторлық сауалнамасының нәтижелері құрады. Зерттеуде сипаттамалық статистика әдістері, уақыт қатарларын талдау, кеңістіктік және кластерлік талдау, Ликерт шкаласы бойынша рейтингтік бағалау, әлеуметтік-экономикалық модельдеудің негізгі компоненттері мен элементтері арқылы факторлық талдау қолданылады. 2021-2026 жылдары әлеуметтік кәсіпкерлік субъектілерінің саны 45-тен 1 780-ге дейін ұлғайғаны анықталды, бұл секторды институционализациялаудың жоғары динамикасын көрсетеді. Сонымен қатар, айтарлықтай өңірлік шоғырлану анықталды: әлеуметтік кәсіпорындардың 29% - ы Астана мен Алматыда шоғырланған. Негізгі кедергілер қаржыландыруға қол жетімділіктің шектелуі (респонденттердің 78%), ақпараттың жетіспеушілігі (65%) және бюрократиялық процедуралар (58%) болып табылады. Мемлекеттік гранттар мен пайыздық мөлшерлемелерді субсидиялау қолдаудың ең тиімді құралы болып танылды. Нәтижелердің практикалық маңыздылығы әлеуметтік инвестицияларды дамыту, қолдауды цифрландыру, сектораралық әріптестік және сараланған өңірлік саясат жөніндегі шараларды негіздеу болып табылады.

Түйін сөздер: әлеуметтік кәсіпкерлік, әлеуметтік кәсіпорындар, мемлекеттік қолдау, инклюзивті экономика, тұрақты даму, Қазақстан

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СОЦИАЛЬНОЕ ПРЕДПРИНИМАТЕЛЬСТВО В КАЗАХСТАНЕ: СОВРЕМЕННОЕ СОСТОЯНИЕ, МЕХАНИЗМЫ ПОДДЕРЖКИ И НАПРАВЛЕНИЯ РАЗВИТИЯ

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Аннотация. Актуальность исследования обусловлена возрастающей ролью социального предпринимательства как инструмента решения общественно значимых проблем, расширения занятости социально уязвимых групп населения и формирования более инклюзивной модели экономического развития Казахстана. Несмотря на нормативное закрепление института социального предпринимательства и активное расширение системы государственной поддержки, дальнейшее развитие сектора сдерживается финансовыми, институциональными и региональными ограничениями. Цель исследования заключается в комплексной оценке современного состояния социального предпринимательства в Республике Казахстан, анализе эффективности действующих механизмов государственной поддержки и определении перспективных направлений его дальнейшего развития. Эмпирическую основу составили данные национального реестра субъектов социального предпринимательства, официальная статистика по занятости и предпринимательству, нормативно-правовые документы, а также результаты авторского опроса 200 социальных предпринимателей, проведённого в апреле–мае 2026 года. В исследовании применены методы описательной статистики, анализа временных рядов, пространственного и кластерного анализа, рейтинговая оценка по шкале Ликерта, факторный анализ методом главных компонент и элементы социально-экономического моделирования. Установлено, что в 2021–2026 гг. количество субъектов социального предпринимательства увеличилось с 45 до 1 780, что свидетельствует о высокой динамике институционализации сектора. Вместе с тем выявлена значительная региональная концентрация: 29% социальных предприятий сосредоточено в Астане и Алматы. Основными барьерами являются ограниченный доступ к финансированию (78% респондентов), недостаток информированности (65%) и бюрократические процедуры (58%). Наиболее эффективными инструментами поддержки признаны государственные гранты и субсидирование процентных ставок. Практическая значимость результатов заключается в обосновании мер по развитию социального инвестирования, цифровизации поддержки, межсекторного партнёрства и дифференцированной региональной политики.

Ключевые слова: социальное предпринимательство, социальные предприятия, государственная поддержка, инклюзивная экономика, устойчивое развитие, Казахстан

Introduction. The study is relevant due to the growing role of social entrepreneurship as a tool for addressing social problems and achieving sustainable development goals in the Republic of Kazakhstan. Social entrepreneurship is a hybrid model that combines commercial activity with efforts to address specific social issues: creating jobs for socially vulnerable groups, providing socially significant services, promoting education, culture, and environmental protection, and supporting families and children.

For the first time, the concept of “social entrepreneurship” was enshrined at the regulatory level in Kazakhstan in 2021 with the adoption of a law on the subject, initiated by members of Parliament and signed by the President of the Republic of Kazakhstan, K. Zh. Tokayev. The legislation provides for a system of state support measures: tax incentives, subsidies for loan interest rates, state grants, preferential leasing of state property, and a priority right to participate in public procurement.

By the end of the fourth quarter of 2025, the number of social entrepreneurship entities in Kazakhstan reached 1,672, and as of August 2026, it had grown to 1,780 enterprises. At the same time, the growth rate remains high: the number of social entrepreneurs doubled between 2024 and 2025. However, the sector faces systemic barriers: limited access to financing, insufficient public awareness of the opportunities offered by social entrepreneurship, bureaucratic procedures, and uneven regional development.

The study aims to conduct a comprehensive analysis of the current state of social entrepreneurship in Kazakhstan, assess the effectiveness of existing state support mechanisms, and formulate strategic directions for the sector's development.

Research objectives: 1. To analyse the dynamics and structure of social entrepreneurship in Kazakhstan for the period 2021–2026.

2. To systematise the mechanisms of state support for social entrepreneurs.

3. To identify the key barriers to the development of social entrepreneurship based on empirical data.

4. To assess the effectiveness of state support tools and formulate strategic directions for development.

The study focuses on social entrepreneurship in the Republic of Kazakhstan. The study examines support mechanisms, development barriers, and strategic directions for expanding the social entrepreneurship sector.

Literature review. Social entrepreneurship as a scientific category emerged at the intersection of entrepreneurship theory, public good theory, and institutional economics. In modern scientific literature, it is regarded as a special form of economic activity that combines entrepreneurial mechanisms with the resolution of socially significant tasks. Some of the foundational studies in this field include the works by Dees (1998) and Martin and Osberg (2007), in which a social entrepreneur is defined as an economic actor capable of identifying persistent social problems, developing innovative ways to solve them, and mobilising resources to scale up social impact. Unlike traditional entrepreneurship, which is primarily focused on profit maximisation, social entrepreneurship prioritises social value, with financial

sustainability a necessary condition for preserving and developing the social mission (Dees, 1998; Martin & Osberg, 2007).

Social entrepreneurship is particularly important in economies where structural social problems, inequality, and limited public resources persist. In studies of developing countries, this institution is viewed as one of the mechanisms for inclusive growth, expanding the economic opportunities of socially vulnerable groups, and reducing social differentiation. Miah et al. (2024) and Quaye et al. (2024) note that the activities of social enterprises can directly contribute to achieving the Sustainable Development Goals, primarily by reducing poverty, expanding access to quality education, ensuring gender equality, and reducing socio-economic inequality. In this context, the effectiveness of social entrepreneurship is determined not only by the enterprise's financial results but also by the scale of its social impact, the sustainability of its business model, and its ability to integrate vulnerable population groups into economic processes.

The institutional approach to the study of social entrepreneurship occupies a significant place in the scientific literature. The development of this sector largely depends on the interaction between formal and informal institutions, including legislative regulation, the availability of financial instruments, government incentive measures, supporting infrastructure, and public perception of social enterprises. Liu and Zhuang (2018) emphasise that the institutional environment can both stimulate and constrain socially focused entrepreneurial activity. Yang et al. (2021) also show that institutional quality and the consistency of regulatory mechanisms significantly affect the development of social enterprises and their ability to scale social innovations.

For Kazakhstan, the institutional component is particularly important due to the relatively recent regulatory consolidation of social entrepreneurship. The current system of support includes the provisions of the Entrepreneurial Code of the Republic of Kazakhstan, state programs for the development of entrepreneurship, financial instruments such as grants, subsidies, and preferential lending, as well as individual elements of infrastructure and consulting support. At the same time, the formation of the institutional environment continues, characterised by heterogeneous access to various support mechanisms for entrepreneurs across different regions and business categories.

Domestic studies confirm that social entrepreneurship in Kazakhstan is gradually transforming into an independent sector of the economy. Kozhabatchina, Andarova, and Andreeva (2025) note a steady trend towards the quantitative growth of social enterprises, while also emphasising systemic limitations stemming from imperfections in legal regulation, limited financial resources, and underdeveloped public support mechanisms. Alzhanova and Sauribaeva (2018) view social entrepreneurship as a new model of sustainable social change that can complement traditional state mechanisms for addressing social problems. At the same time, the authors draw attention to insufficient awareness among the population and the

business community, as well as difficulties in accessing financial resources, which hinder the sector's expansion.

International experience demonstrates a significant diversity of models for state and non-state support of social entrepreneurship. In the UK, the social investment system plays a significant role, with Big Society Capital being one of its key institutions. This approach involves mobilising private capital to finance projects with measurable social impact. In the United States, hybrid organisational and legal forms have become widespread, including Benefit Corporations, which allow businesses to combine commercial goals with a defined social mission. South Korea, in turn, uses a more active model of state involvement, which includes direct funding, tax incentives, training programs, and institutional support for social enterprises. These approaches indicate

Materials and main methods. The study is based on a comprehensive use of quantitative and qualitative data, which enables assessment of the current state, dynamics, regional characteristics, and institutional conditions for the development of social entrepreneurship in the Republic of Kazakhstan. The information basis of the study consists of data from the national register of social entrepreneurship entities, official statistical data from the Bureau of National Statistics of the Republic of Kazakhstan on employment and entrepreneurial activity indicators, materials from state programs supporting entrepreneurship, regulatory legal acts governing the activities of social entrepreneurship entities, as well as the results of the author's sociological survey.

An important component of the empirical base was the results of an author's survey of 200 social entrepreneurship entities, conducted in April–May 2026. The questionnaire aimed to identify entrepreneurs' assessments of the availability and effectiveness of existing state support tools, the main financial, administrative, personnel, and information constraints, and the factors influencing the sustainability and scalability of social enterprises. The use of primary data enabled us to supplement official statistics with assessments from direct participants in the sector and to compare institutional support mechanisms with the actual needs of social entrepreneurs.

The research methodology is based on a combination of descriptive statistics, dynamic analysis, comparative and spatial analysis, factor and cluster analysis, and elements of socio-economic modelling. This approach is due to the complex nature of social entrepreneurship, whose development is determined simultaneously by economic, social, institutional, and territorial factors.

In the first stage of the study, descriptive statistics were applied. The number of registered social entrepreneurship entities, their regional distribution and main areas of activity, and indicators characterising social enterprises' participation in employment provision were analysed. To assess changes over time, absolute and relative dynamics indicators were used. The growth rate was determined as follows:

$$T_{g,t} = \frac{Y_t}{Y_{t-1}} \times 100$$

Where

$T_{g,t}$ is the growth rate of the studied indicator in period (t), %;

Y_t is the value of the indicator in the current period;

Y_{t-1} is the value of the indicator in the previous period.

To characterise the territorial structure of social entrepreneurship, the share of each region in the total number of registered entities was calculated:

$$S_i = \frac{N_i}{\sum_{t=1}^n N_t} \times 100$$

where

S_i is the share of the (i)-th region in the total number of social entrepreneurship entities, %;

N_i is the number of social enterprises in the (i)-th region;

n is the number of regions under consideration.

To study the effectiveness of existing support mechanisms, survey results were used. Respondents were asked to assess the availability and practical effectiveness of individual support tools on a five-point Likert scale, where 1 corresponded to the minimum rating and 5 to the maximum rating. The analysis covered financial support measures, including grant funding, subsidies, and preferential lending, as well as consulting, educational, and infrastructure tools. For each area, the mean, median, and measures of variation were calculated, enabling a comparative assessment of various mechanisms for supporting social entrepreneurship.

To systematise the barriers to the development of social entrepreneurship, principal component analysis (PCA) was applied. The analysis included indicators characterising financial constraints, administrative procedures, access to government programs, a lack of information and advisory support, personnel issues, infrastructure constraints, and difficulties in scaling operations. Using this method makes it possible to reduce the set of interrelated variables and identify latent groups of factors that form the main constraints on the sector's development. The general model is presented as follows:

$$F_j = a_{j1}X_1 + a_{j2}X_2 + \dots + a_{jp}X_p$$

where

F_j is the value of the j-th identified factor;

$X_1, \dots, X_p$ are standardized indicators of barriers;

$a_{j1}, \dots, a_{jp}$ are the factor loadings of the corresponding variables.

When interpreting the factor structure, the explained variance indicators and the magnitude of the factor loadings were taken into account. This approach made it

possible to move from analysing individual obstacles to identifying consolidated institutional, financial-economic, and organisational groups of constraints.

A separate area of the study was assessing the contribution of social entrepreneurship to employment generation. To this end, an approach was used to distinguish among direct, indirect, and induced effects. The direct effect refers to the jobs created by social enterprises. The indirect effect reflects the additional employment that arises within supplier organisations and in related activities. The induced effect is associated with the expansion of economic activity resulting from employees' spending of their incomes. The total employment effect was defined as:

$$E_{\text{total}} = E_{\text{direct}} + E_{\text{indirect}} + E_{\text{induced}}$$

where

E_{total} is the total employment effect;

E_{direct} is the direct effect;

E_{indirect} is the indirect effect;

E_{induced} is the induced effect.

At the same time, the quantitative interpretation of the indirect and induced effects was carried out only within the limits of the available empirical information. This limitation was taken into account to avoid overestimating the socio-economic contribution of the sector under study.

To identify territorial heterogeneity, a k-means cluster analysis was applied. Indicators of the number of social enterprises, their relative concentration, employment, and availability of support mechanisms were used as signs of clustering. Before clustering, quantitative variables were standardised to eliminate the impact of differences in measurement units and indicator scales. The k-means method involves minimising the intragroup sum of the squares of the distances:

$$\text{Min} \sum_{k=1}^K \sum_{x_i \in C_k} \|X_i - \mu_K\|^2$$

Where

K is the number of clusters;

C_k is the set of regions assigned to the k-th cluster;

X_i is the vector of region characteristics;

μ_K is the centre of the corresponding cluster.

The application of cluster analysis enabled the grouping of regions of Kazakhstan based on similar characteristics of social entrepreneurship development and the identification of territories with relatively high, medium, and low levels of sector development. The resulting typology was subsequently used to substantiate a differentiated approach to state support measures.

The reliability of the empirical results was ensured by comparing data across multiple sources and applying complementary quantitative methods consistently. Official statistical and administrative data were used to analyse the sector's scale and spatial structure. At the same time, the results of the author's survey enabled an assessment of the institutional conditions for its operation from the perspective of social entrepreneurs themselves. The combination of descriptive statistics, factor analysis, assessment of employment effects, and clustering provides a comprehensive view of social entrepreneurship as an economic and social institution. It creates a methodological basis for subsequent evaluation of the effectiveness of its support mechanisms in Kazakhstan.

Results. An analysis of the dynamics of social entrepreneurship in the Republic of Kazakhstan from 2021 to 2026 indicates a significant expansion of the sector following its institutionalisation in national legislation. If in 2021 the number of registered social entrepreneurship entities was 45, then in 2024 their number reached 835; by the end of 2025, it was 1,672; and as of August 2026, 1,780 entities were registered in the relevant register. Thus, compared to the initial level, the number of social enterprises increased 39.6-fold. This trend indicates not only an expansion of the sector's scale but also the gradual formation of social entrepreneurship as an independent institutional segment of small and medium-sized businesses in Kazakhstan.

Table 1 – Dynamics of social entrepreneurship development in Kazakhstan, 2021–2026.

Indicator	2021	2022	2023	2024	2025	2026
Number of JV entities	45	180	420	835	1 672	1 780
Growth, % compared to the previous year	—	300,0	133,3	98,8	100,2	6,5
Jobs have been created	450	1 200	2 800	5 200	8 900	10 200
Socially vulnerable people are employed	320	890	2 100	3 900	6 700	7 800
The share of joint ventures in the total number of SMEs (%)	0,01	0,03	0,07	0,13	0,25	0,26

*Note: compiled by the authors based on data from the national register of social entrepreneurship entities of the Ministry of National Economy of the Republic of Kazakhstan and the authors' calculations. The data for 2026 are provided as of August.

The data presented make it possible to identify several stages in the sector's development. The most intensive increase in the number of social enterprises was observed at the initial stage of institutionalisation: in 2022, the growth amounted to 300.0%, and in 2023 — 133.3%. In 2024, the number of registered entities almost doubled, up 98.8%, while in 2025 it rose 100.2%. Consequently, the development of social entrepreneurship during the period under consideration occurred significantly faster than could be expected with the usual organic expansion of the entrepreneurial sector.

However, the 6.5 % growth rate in 2026 requires cautious interpretation, as it reflects the change only for an incomplete calendar year. Therefore, it cannot be unequivocally regarded as evidence that the sector has reached its growth limit.

However, even taking this limitation into account, the dynamics may indicate a gradual transition from the initial quantitative expansion to a stage where further development will largely depend on the sustainability of existing enterprises, the availability of financing, market demand, and the effectiveness of institutional support mechanisms.

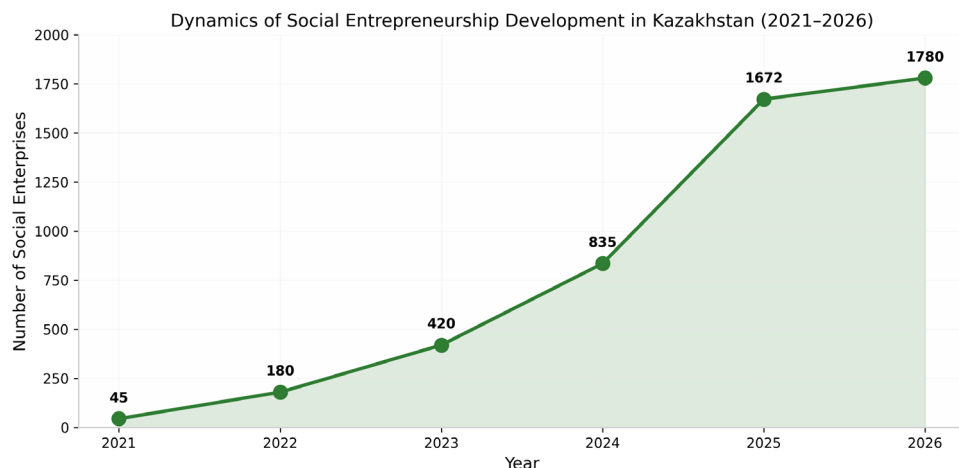


Figure 1 – Dynamics of the number of social entrepreneurship entities in Kazakhstan in 2021–2026.

Note: compiled by the authors based on data from the national register of social entrepreneurship entities maintained by the Ministry of National Economy of the Republic of Kazakhstan.

A particularly significant outcome of the sector's development is its contribution to employment. The number of jobs created increased from 450 in 2021 to 10,200 in 2026, i.e., by a factor of 22.7. At the same time, the number of employed representatives from socially vulnerable groups grew from 320 to 7,800. As of 2026, their share of total jobs created by social enterprises was about 76.5%. The obtained result shows that social entrepreneurship performs not only an entrepreneurial function but also a pronounced socio-integration function, creating employment opportunities for population groups whose competitive positions in the traditional labour market may be limited.

Despite high growth rates, the sector's relative scale within Kazakhstan's entrepreneurial structure remains small. The share of social enterprises in the total number of SMEs increased from 0.01 % in 2021 to 0.26 % in 2026. Consequently, a contradiction emerges: social entrepreneurship exhibits high relative growth rates, yet it currently occupies a limited niche within the national entrepreneurial ecosystem. This circumstance indicates significant potential for further expansion of the sector.

Regional analysis has revealed a pronounced spatial heterogeneity in the distribution of social enterprises. The largest number of registered entities is

concentrated in Astana — 270 enterprises, which account for 15.2% of the total. In Almaty, 245 entities (13.8%) are registered, and in the Turkestan Region -198 (11.1%). Together, these three territories account for about 40% of the country's registered social enterprises.

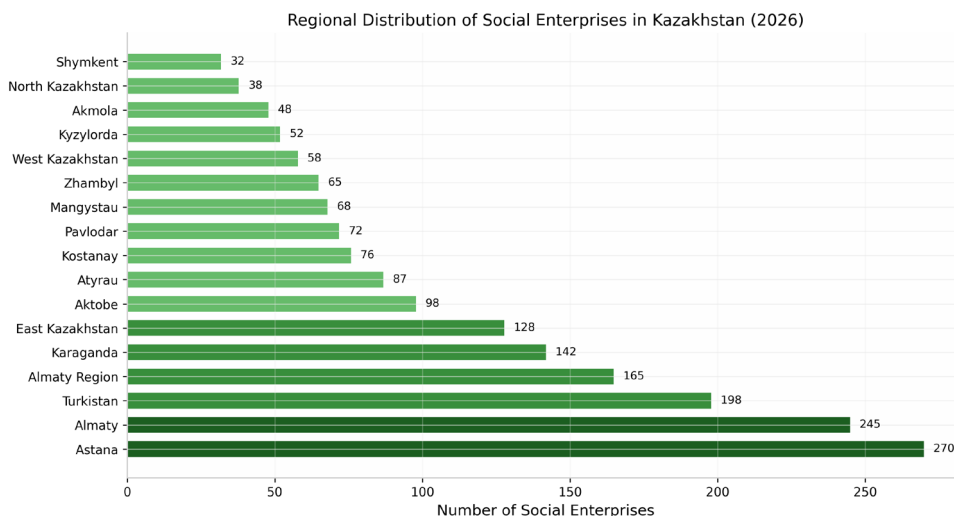


Figure 2 — Regional distribution of social entrepreneurship entities in Kazakhstan in 2026.

Note: compiled by the authors based on data from the national register of social entrepreneurship entities.

The concentration of social enterprises in the largest cities may be linked to a more developed entrepreneurial infrastructure, a high density of potential consumers of social services, the presence of educational and consulting organisations, and greater availability of financial and information resources. At the same time, the relatively high representation of social enterprises in the Turkestan region indicates that the development of this sector is not limited to the largest agglomerations. In regions with a high proportion of the rural population, social entrepreneurship can serve an additional function by creating jobs and providing services directly at the local level.

At the same time, a group of territories with relatively few registered social enterprises was identified. According to the data presented, these include Shymkent - 32 enterprises, North Kazakhstan Region - 38, and Akmol Region - 48 enterprises. The identified differentiation shows that the territorial spread of social entrepreneurship depends not only on the population size but also on a combination of institutional and economic conditions. In this regard, a unified approach to supporting the sector may yield different results in various regions.

An analysis of the structure of social enterprises by area of activity has also revealed

some specialisation within the sector. The largest share - 32.6% - is accounted for by enterprises whose activities are related to creating jobs for members of socially vulnerable groups. Enterprises operating in the fields of education, culture, and ecology account for 26.4%, social services for 22.0%, and the sale of goods and services produced by socially vulnerable population groups for 18.0%.

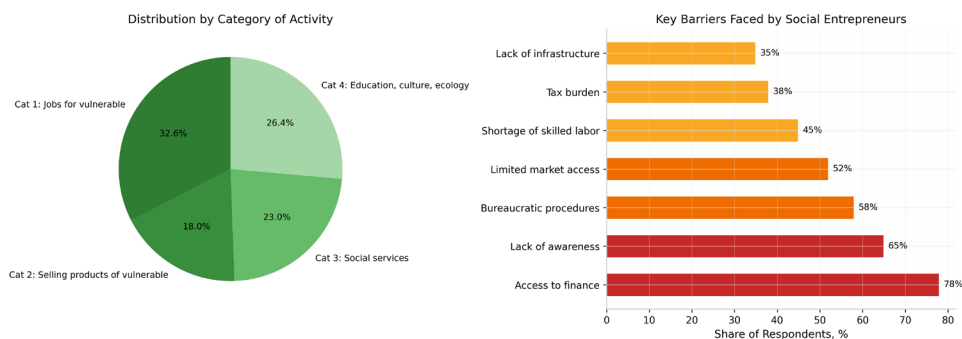


Figure 3 — Distribution of social enterprises in Kazakhstan by main areas of activity
Note: compiled by the authors based on the research results.

The resulting structure shows that the dominant focus of social entrepreneurship is addressing employment issues and the economic integration of vulnerable population groups. At the same time, nearly half of the sector is devoted to education, culture, ecology, and the provision of social services. This indicates a gradual expansion of the functional scope of social entrepreneurship beyond purely labour integration.

A significant focus of the empirical study was on identifying the factors limiting the sector's further development. The results of a 2026 survey of 200 social entrepreneurs show that the most significant limitation remains access to financial resources. 78% of respondents pointed to this problem.

Table 2 — Key barriers to the development of social entrepreneurship in Kazakhstan (n = 200)

Barrier	Percentage of respondents, %	The level of criticality
Access to financing	78	Critical
Lack of awareness	65	Tall
Bureaucratic procedures	58	High
Limited access to markets	52	Medium
Shortage of skilled personnel	45	Average
Tax burden	38	Average
Lack of infrastructure	35	Low

Note: compiled by the authors based on the results of a survey of social entrepreneurs conducted in 2026.

The financial constraint is systemic, as social enterprises must simultaneously ensure financial sustainability and fulfil their stated social mission. According to the

survey results, the problem manifests as insufficient funds, collateral requirements, and difficulties accessing certain state support instruments.

Second place is taken by insufficient awareness — this barrier was noted by 65 % of respondents. The result indicates information asymmetry between the existing support system and its potential recipients. In particular, a lack of information can limit entrepreneurs' opportunities to obtain the appropriate status, choose financing instruments, and use state-provided support measures.

Bureaucratic procedures are considered a significant obstacle by 58% of the respondents, while 52% noted limited access to markets. The latter indicator is of particular interest, as it demonstrates that the sustainability of a social enterprise is determined not only by the presence of state support. After passing the initial development stage, the enterprise must create a sustainable market demand for the goods or services it produces. Consequently, the sector's further development requires a gradual shift in focus from primarily providing initial support to tools for expanding sales markets.

The results of the assessment of existing state support mechanisms confirm this conclusion. Respondents consider the most effective tools to be those that directly reduce the financial constraints enterprises face.

Table 3 — Assessment of the effectiveness of state support mechanisms
for social enterprises (n = 200)

Support mechanism:	Average score	The level of efficiency
Government grants	4,2	Tall
Interest rate subsidies	3,8	High
Business training and consulting	3,6	Medium
Tax incentives	3,5	Average
Preferential rent	3,2	Average
Informational support	3,1	Average
Priority in public procurement	2,9	Low

Note: compiled by the authors based on the results of a survey of social entrepreneurs conducted in 2026; the assessment was carried out using a five-point Likert scale.

State grants received the highest rating - 4.2 points out of 5 possible. Interest rate subsidies are rated at 3.8 points. This is consistent with the identified barrier structure. Since the lack of financial resources is the most common problem, entrepreneurs perceive tools of direct or indirect financial support as the most effective.

Business training and consulting received 3.6 points, tax incentives 3.5, preferential rent 3.2, and information support 3.1. The lowest rating was recorded for the mechanism of priority participation by social enterprises in public procurement: 2.9 points. The obtained values indicate a gap between the formal existence of certain support tools and their perceived practical effectiveness.

Comparing the results in Tables 2 and 3 reveals an important pattern. On the one hand, 52 % of respondents cite limited access to sales markets as one of the main

obstacles to development. On the other hand, the tool that could expand demand for social enterprises' products through public procurement received the lowest assessment of its effectiveness. Consequently, one of the potential areas for the sector's development is not so much the introduction of additional forms of support as the improvement of the practical accessibility of existing mechanisms.

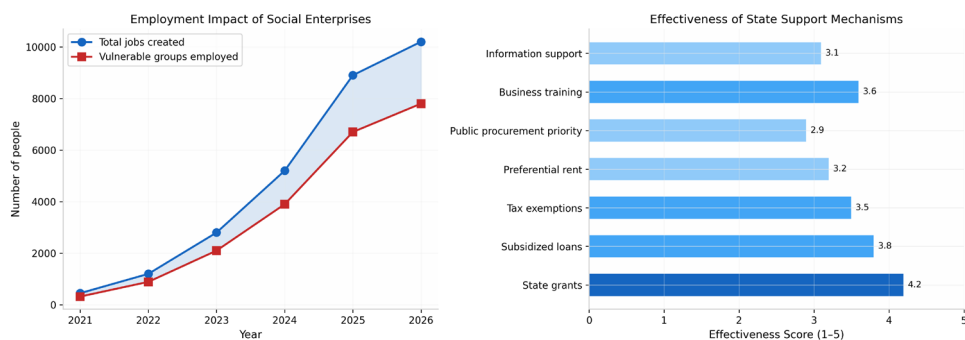


Figure 4 — The impact of social entrepreneurship on employment and an assessment of the effectiveness of state support mechanisms

Note: compiled by the authors based on the results of the study.

A separate area of analysis concerns the assessment of the contribution of social enterprises to employment generation. By August 2026, according to the empirical data used, social enterprises had created 10,200 jobs, of which 7,800 were for representatives of socially vulnerable population groups. Thus, their share amounted to 76.5%:

$$S_{vuln} = \frac{7800}{10200} \times 100 = 76.5\%$$

where S_{vuln} is the share of representatives of socially vulnerable groups in the total number of jobs created.

Given the multiplier effect of employment used in the study, which is equal to 1.8, the potential total effect is determined as follows:

$$E_{total} = E_{direct} \times k$$

where E_{total} is the overall employment effect;

E_{direct} - directly created jobs;

k - the employment multiplier coefficient.

At $E_{direct}=10200$ and $k=1.8$, the estimated total effect is:

$$E_{total} = 10200 \times 1.8 = 18360$$

Accordingly, the indirect and induced component is estimated at approximately 8,160 jobs. However, this figure should be interpreted as a model estimate rather than the actual number of registered jobs, as its value depends directly on the adopted multiplier.

Overall, the research results allow us to conclude that social entrepreneurship in Kazakhstan is transitioning from the initial stage of institutional formation to scaling up and the development of a sustainable entrepreneurial ecosystem. The quantitative increase in the number of entities is accompanied by an expansion of employment and a high concentration of jobs created among socially vulnerable population groups. At the same time, the sector's development is characterised by significant regional heterogeneity and persistent financial, informational, and administrative constraints.

The results also show that a further increase in the number of registered social enterprises cannot be considered a sufficient criterion for the effectiveness of public policy. At the next stage, the key indicators are the sustainability of enterprises, the duration of their operations, their ability to generate income independently, expand sales markets, create stable jobs, and deliver measurable social impact. Thus, it is advisable to gradually shift the priority of state policy from encouraging the registration of new entities to creating conditions for their long-term economic sustainability and scaling up social impact.

Discussion. The results confirm that social entrepreneurship in Kazakhstan is at the stage of active institutional development, characterised by a combination of high rates of quantitative growth and persistent qualitative limitations. The increase in the number of registered entities from 45 in 2021 to 1,780 as of August 2026 indicates a significant expansion of the sector and growing interest in this entrepreneurial model. At the same time, the slowdown in growth in 2026 should be interpreted with caution, as the indicator refers to an incomplete calendar year. Therefore, it is more reasonable to speak not of the exhaustion of the potential of the current support model, but of a possible transition from the initial stage of rapid quantitative expansion to a stage in which the sustainability of social enterprises, their ability to scale their activities, and their capacity to deliver a measurable social impact become decisive.

The conclusions obtained are consistent with theoretical concepts of social entrepreneurship as a hybrid form of economic activity in which entrepreneurial mechanisms are combined with the resolution of socially significant tasks. Dees (1998) and Martin and Osberg (2007) emphasise that the sustainability of social enterprises is determined not only by their ability to generate income but also by the effectiveness of their social value creation. In the context of Kazakhstan, this is especially important, since the identified quantitative growth of the sector must be accompanied by the development of stable business models that simultaneously fulfil a social mission and ensure financial viability.

The identified contribution of social enterprises to employment is particularly

important. According to the study results, by 2026 they had created 10,200 jobs, of which 76.5% were for representatives of socially vulnerable groups. This confirms that social entrepreneurship serves the function of economic integration for those categories of the population whose opportunities in the traditional labour market may be limited. The result obtained aligns with the findings of Miah et al. (2024) and Quaye et al. (2024), who view social entrepreneurship as a mechanism for achieving the Sustainable Development Goals, primarily in poverty reduction, increased employment, and reduced social inequality.

At the same time, the sector's regional structure indicates significant territorial heterogeneity. The concentration of 29 % of social enterprises in Astana and Almaty reflects the advantages of the largest cities, which are associated with a more developed entrepreneurial infrastructure, the presence of financial institutions, educational organisations, consulting centres, and broader markets. Such spatial concentration is, on the one hand, natural, and, on the other hand, it may exacerbate differences between regions in the availability of social services and entrepreneurial opportunities.

The high share of social enterprises in the Turkestan region is of particular interest to researchers. This result shows that social entrepreneurship can be in demand not only in the largest cities but also in regions with a high proportion of the rural population and a significant need to address local social problems. Consequently, the potential of social entrepreneurship in Kazakhstan should be considered on a differentiated basis: in large cities, it may be associated primarily with innovative social services, educational and digital projects, while in rural areas, promising areas may include agro-social entrepreneurship, handicraft production, local services, and projects that employ vulnerable population groups.

The results of the barrier analysis allow us to assert that the main limitation to the development of social entrepreneurship remains access to financial resources. 78% of respondents pointed to this problem. This situation indicates a structural contradiction: social enterprises must ensure commercial sustainability, but the specifics of their activities often limit their ability to provide sufficient collateral and achieve a high rate of return. As a result, traditional financial instruments are less accessible to them. The results obtained are consistent with findings from domestic studies, which identify limited access to financing as a key factor hindering further development of the sector (Alzhanova & Saurbaeva, 2018; Kozhabatchina et al., 2025).

The high proportion of respondents who cited insufficient awareness (65%) and bureaucratic procedures (58%) indicates that the limitations are not only financial but also institutional. This confirms the principles of the institutional approach, according to which the development of social entrepreneurship depends on the quality of interactions among formal rules, support mechanisms, and entrepreneurs' actual ability to use existing tools (Liu & Zhuang, 2018; Yang et al., 2021). Thus, the mere presence of legally established support measures does not guarantee their effectiveness if access to them is complicated.

The results of the regional analysis substantiate the need for a differentiated territorial policy. Uniform support measures do not fully account for differences in regional market structures, levels of entrepreneurial activity, access to financing, and the nature of social problems. For large cities, it is advisable to stimulate the development of socio-technological projects, digital services, education, inclusive services, and innovative forms of employment. For rural regions, agro-social enterprises, local production cooperatives, craft projects, and services focused on addressing employment issues and ensuring access to basic social services may be more promising.

Thus, the results show that the further development of social entrepreneurship in Kazakhstan requires a shift from a policy primarily focused on quantitative growth to the development of a full-fledged ecosystem that supports the sustainability and scaling of social enterprises. Such an ecosystem should combine financial instruments, market access, digital support infrastructure, mechanisms for intersectoral interaction, and a differentiated regional policy. At the same time, it is advisable to assess the effectiveness of state support not only by the number of registered social enterprises, but also by the duration of their operations, the jobs created, their financial sustainability, the coverage of socially vulnerable groups, and the measurable social impact.

In this context, the scientific significance of the obtained results lies in confirming that the institutionalisation of social entrepreneurship in Kazakhstan is accompanied by a transition from the initial stage of forming a regulatory framework to a more complex stage of development, at which the key issues become the quality of the institutional environment and the sustainability of business models. The practical conclusion is that it is necessary to reorient state policy from individual support measures to an integrated model that provides social enterprises with access to capital, markets, information, and infrastructure throughout the entire life cycle of their development.

Conclusion. The study allows us to formulate the following main conclusions. First, social entrepreneurship in the Republic of Kazakhstan demonstrates high rates of institutionalisation: over the period from 2021 to 2026, the number of entities increased from 45 to 1,780, and the jobs they created employed more than 10,200 people, of whom 76.5% belong to socially vulnerable groups.

Secondly, the sector is characterised by significant regional disparities: 29% of social enterprises are concentrated in Astana and Almaty, while several regions (North Kazakhstan Region, Akmola Region, Shymkent) have a critically low level of social entrepreneurship development.

Thirdly, the key barriers to development are access to financing (78 %), lack of awareness (65 %), and bureaucratic procedures (58 %). The most effective support mechanisms are recognised as government grants (4.2 out of 5) and interest rate subsidies (3.8 out of 5), while the priority in public procurement is underutilised (2.9 out of 5).

Fourthly, strategic directions are proposed for the further development of social entrepreneurship: creating a National Ecosystem for Social Entrepreneurship, developing social investment, digitalising support, fostering cross-sector partnerships, and implementing differentiated regional policies.

The prospects for further research include assessing the social impact of social enterprises, analysing the success factors for scaling social innovations, and studying the impact of digital transformation on social entrepreneurship models.

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