**ANNOTATION**

**to the dissertation by Kankulov Margulan Kanatovich on the topic: "Creative Industries of Kazakhstan as a Complementary Factor of the National Innovation System: Mechanisms of Development and Support in the Conditions of Post-Industrial Inclusive Development", submitted for the academic degree of Doctor of Philosophy (PhD) on the educational program "8D04101 – Economics"**

**Relevance of the Research Topic.**

In the context of the global economic transformation associated with the transition to a post-industrial development model, the role of intangible drivers of economic growth—primarily human, intellectual, and creative capital—is increasing significantly. Leading international research centers and organizations view creative industries as a key source of innovation, structural diversification, and sustainable economic development. Within this paradigm, the concept of post-industrial inclusive growth assumes particular importance, as it encompasses not only enhancing economic efficiency but also expanding the participation of various social and age groups in value-added creation processes.

For Kazakhstan, the relevance of studying creative industries is driven by both objective transformations in the global economy and strategic priorities of national development. In his annual Addresses, the President of the Republic of Kazakhstan has repeatedly emphasized the importance of the creative economy and innovative transformation as key drivers of sustainable and inclusive economic growth. Thus, in the State-of-the-Nation Address "Economic Course of a Just Kazakhstan" on September 1, 2023, Head of State K.K. Tokayev noted that "in the modern world, it is 'creative production' based on the creative potential and intellectual capital of citizens that serves as a source of development for a truly inclusive economy."

The relevance of developing creative industries for Kazakhstan is also determined by the need to overcome commodity dependence, strengthen the national innovation system, and form new drivers of economic growth amid intensifying global technological and cultural competition. In this regard, creative industries can be viewed as an economic element that stimulates innovation activity and complementarily enhances the national innovation system (NIS) by creating new markets and products.

However, despite the presence of strategic and policy documents, creative industries in Kazakhstan are still characterized by fragmented development, uneven regional localization, and a limited degree of integration into the NIS, which reduces their innovative and inclusive potential and necessitates a comprehensive scientific analysis of their operational conditions.

The study of clustering processes in creative industries acquires particular relevance as a mechanism for concentrating creative and innovative potential, strengthening network interactions, and enhancing the efficiency of regional resource utilization. Under Kazakhstani conditions, the formation of creative clusters occurs under the influence of a combination of ethno-historical, cultural-symbolic, and

innovative-technological factors, which necessitates an interdisciplinary and element-by-element analysis at the regional level.

An additional dimension of the research relevance lies in the issue of post-industrial growth inclusiveness, specifically expanding the access of various age groups to economic activity within the creative industries sector. Flexible employment forms, digital platforms, and the project-based nature of activities characteristic of the creative sector create prerequisites for engaging population groups operating outside the traditional core of the labor market. However, the potential of age inclusion in the development and clustering of Kazakhstan's creative industries remains insufficiently researched and institutionally formalized to date.

Therefore, the relevance of the chosen topic is determined by a combination of global post-industrial trends, strategic priorities of Kazakhstan's socio-economic development, as well as the presence of substantial theoretical, methodological, and applied gaps in the study of creative industries as a complementary factor of the national innovation system. A comprehensive examination of the mechanisms underlying their development and clustering in the context of post-industrial inclusive growth possesses significant scientific and practical potential, directly addressing the contemporary challenges of economic science and public policy.

Prior scientific research within the subject area of this dissertation can be conventionally divided into several interrelated clusters that reflect the evolution of scientific perspectives on the creative economy, creative industries, national innovation systems, cluster development mechanisms, and inclusive economic growth.

The first cluster comprises foundational studies dedicated to the theoretical and methodological frameworks of post-industrial development, innovation dynamics, and the role of intangible drivers of economic growth. In their seminal works, J. Schumpeter, P. Drucker, N. Kondratiev, and G. Becker laid the groundwork for analyzing innovation, entrepreneurship, human capital, and intellectual capital as key drivers of economic development. These papers formed the methodological foundation for the subsequent conceptualization of creativity as an economic resource under post-industrial transformation.

The second cluster of research pertains to the formation and evolution of the concept of the creative economy and creative industries. Significant contributions to this field were made by J. Howkins, who first systematized the creative economy as an independent sector; R. Florida, who substantiated the role of the creative class in regional development; and C. Landry, who explored creative cities and spatial aspects of creative industry development. Within this cluster, creativity is recognized as a key driver of competitiveness and regional growth; however, its systemic integration into national innovation systems remains insufficiently addressed.

The third research cluster focuses on the theory and practice of national innovation systems. Seminal works by B.-Å. Lundvall, R. Nelson, and C. Freeman established the framework for systemic analysis of innovation-driven development and institutional interactions among government, business, and academia. Nevertheless, creative industries within these traditional models are generally not

delineated as a distinct complementary element of the NIS, creating a theoretical and methodological gap that this dissertation aims to bridge.

The fourth cluster encompasses research dedicated to the cluster approach and the spatial organization of innovation-driven development. In his seminal works, M. Porter substantiated the role of clusters in enhancing competitiveness and concentrating innovative potential. These ideas were further developed in studies of creative and cultural clusters, primarily focusing on developed economies and major urban agglomerations. However, the influence of ethno-historical, cultural-symbolic, and institutional factors on the formation of creative clusters in countries with emerging innovation systems remains insufficiently explored.

The fifth research cluster pertains to the concept of inclusive economic growth and the expansion of socio-economic participation among the population. In their studies, A. Sen and J. Stiglitz recognized inclusiveness as a key prerequisite for sustainable development. Nevertheless, the link between inclusive growth and the development and clustering of creative industries within national innovation systems remains insufficiently conceptualized to date.

In domestic scientific and analytical literature, the issue of the creative economy and creative industries in Kazakhstan began to take shape relatively recently. Research directly dedicated to the creative economy and creative industries includes works by A.Zh. Zhusupova, G.B. Utibayeva, M.M. Idrisov, A.K. Isatayeva, Zh.S. Khussainova, and M.K. Asanova, which examine the economic essence of creative industries, their institutional formalization, employment, and contribution to socio-economic and regional development.

A distinct direction of domestic research pertains to the analysis of regional and urban aspects of creative industry development, the formation of creative spaces, and elements of clustering. In the works of S.I. Omirbayev, R.M. Zhunusova, and D. Nurkhaliyeva, creative industries are viewed as a driver of urban economy development, entrepreneurship, and new forms of employment, with particular emphasis on the role of cultural-symbolic and spatial features.

At the same time, an analysis of domestic publications shows that while there are studies directly dedicated to the creative economy and creative industries, research examining this sector in systemic interconnection with the national innovation system, cluster development mechanisms, and inclusive aspects of post-industrial growth remains limited. Questions regarding the complementarity of creative industries to other NIS elements, as well as their role in expanding the socio-economic participation of various age groups, remain insufficiently developed.

Therefore, despite a substantial body of foreign and domestic scientific publications addressing specific aspects of the creative economy, innovation systems, cluster development, and inclusive growth, a comprehensive investigation into Kazakhstan's creative industries as a complementary factor of the national innovation system in the context of post-industrial inclusive growth has not received adequate academic exploration to date. This justifies the choice of topic, its scientific novelty, and practical significance.

The aim of the dissertation research is to develop theoretical and methodological framework, along with practical mechanisms for the development and support of

Kazakhstan's creative industries as a complementary factor of the national innovation system, aimed at enhancing their role in securing post-industrial inclusive economic growth.

**Research Objectives.** Achieving the set objective necessitated defining the following specific tasks, the logical sequence of which reflects the main stages of the undertaken research. Thus, the primary research objectives include:

- conducting a gnoseological analysis of the creative economy while clarifying the genesis of concepts and its categorical framework;
- specifying the essential characteristics and typologization criteria of creative industries in the modern economy;
- substantiating the role of creative industries in the national innovation system (NIS) by identifying patterns of their complementarity and convergence in the context of post-industrial inclusive economic growth;
- investigating the cluster approach as a mechanism for developing creative industries within the NIS;
- synthesizing global experiences in the functioning of creative industries under post-industrial inclusive development;
- systematizing the institutional framework for the functioning of the creative economy in Kazakhstan;
- performing a structural-dynamic analysis of the profiles and development vectors of creative industries in Kazakhstan;
- examining the formation processes of creative industry clusters at the regional level, determining the role of ethno-historical, cultural-symbolic, and innovative-technological factors in their establishment and growth;
- assessing the development potential of creative industries within the context of opportunities for age inclusion in economic activity in Kazakhstan;
- designing an institutional mechanism for integrating the creative sector into the circuit of Kazakhstan's national innovation system;
- substantiating and modernizing the financial and economic mechanism for supporting creative industries in Kazakhstan, including instruments to incentivize cluster-based organizational forms;
- developing an integrative model for the development and clustering of creative industries in Kazakhstan within the circuit of the national innovation system based on age inclusion, specifying implementation mechanisms and tools for ensuring effectiveness.

**Object of the research:** Kazakhstan's creative industries as a sector of the national economy functioning under post-industrial inclusive economic growth and interacting with elements of the national innovation system.

**Subject of the research:** economic, institutional, and cluster relations, as well as mechanisms for the development of Kazakhstan's creative industries that determine their complementarity and convergence with the national innovation system and their contribution to post-industrial inclusive economic growth.

**Scientific novelty of the dissertation research.** The most significant results containing scientific novelty include the following:

1) The theoretical and methodological provisions of the creative economy have been developed, its categorical framework clarified, and a gnoseological interpretation of creative industries substantiating them as a factor of post-industrial inclusive development and a prerequisite for their complementary interaction with the NIS has been provided.

2) The essential characteristics of creative industries have been specified, an author's definition formulated, and a typology systematized that accounts for differences in value creation mechanisms, the structure of creative capital, and the institutional conditions of their functioning.

3) It has been proven that creative industries, as a complementary element of the national innovation system, through the implementation of convergent interaction mechanisms among its components, generate multidimensional inclusive effects of post-industrial economic growth; thereby revealing a stable dependence: an increase in the degree of production creativity conditions an enhancement of its inclusiveness.

4) The cluster approach to the development of creative industries within the NIS has been substantiated as a mechanism for their spatial integration, serving as a basis for designing a two-level typology of creative clusters, which encompasses a structural-functional typology reflecting the sectoral structure, and a spatial-functional typology of clusters characterizing the forms of their territorial organization. Based on an analysis of global best practices, sustainable models of creative industry development were delineated, differing in terms of state involvement, institutional mechanisms, and the degree of integration into the NIS.

5) The institutional framework of the creative economy in the Republic of Kazakhstan has been systematized with the identification of its establishment stages, thereby revealing institutional constraints, "pits," and "traps" caused by regulatory fragmentation, the selectivity of classification instruments, and misalignment between supporting entities and mechanisms; an original typology of institutional failures has been developed, and directions for overcoming them have been substantiated, including the expansion of the List of economic activities classified under creative industries, as well as the refinement of identification criteria for creative entities considering flexible and digital employment forms.

6) A structural-dynamic analysis of the creative industries of the Republic of Kazakhstan has been conducted, enabling the identification of their structural profiles, development vectors, and systemic imbalances; the spatial-functional types of emerging creative clusters in Kazakhstan have been determined, and a vector positioning model has been constructed, accounting for ethno-historical, cultural-symbolic, and innovative-technological factors.

7) The role of age inclusion as a systemic factor in the development of creative industries in Kazakhstan – enabling the realization of human potential across various age groups and mediating the impact of institutional conditions on economic outcomes – has been substantiated and empirically validated through structural econometric modeling.

8) An integrated system of mechanisms for the development and support of Kazakhstan's creative industries within the NIS circuit has been developed; it encompasses institutional and financial-economic mechanisms, alongside a model for

their development and clustering based on the creative capital lifecycle concept and age inclusion mechanisms, thereby fostering conditions for post-industrial inclusive growth.

**Main scientific statements provided for the defense.** Based on the findings of the study, the author submits the following statements for the defense:

1) The statement on creative industries as a factor of post-industrial inclusive development, according to which creative industries represent an economic segment based on the creation and utilization of intangible forms of value, knowledge, and creative capital. Their gnoseological conceptualization allows for uncovering the evolution of scientific approaches to the creative economy, clarifying its categorical framework, and substantiating the prerequisites for integrating creative industries into the circuit of the national innovation system.

2) The statement on the essential nature and typological differentiation of creative industries, according to which an author's definition of creative industries is proposed as a set of economic activities based on the integration of human, creative, and symbolic capital, ensuring the creation and commercialization of products with a predominant share of intangible value added. In contrast to existing approaches, creative industries are viewed as a hybrid economic segment characterized by structural heterogeneity, for which an original typology has been developed (cultural-historical, performing arts, media-content, and technological types), reflecting differences in the reproduction mechanisms of the creative product.

3) The statement on the complementarity and convergence of creative industries within the NIS framework, based on the developed model, which accounts for the fact that the characteristics of creative industries (digitalization, platformization, personalization, the intangible nature of value, the networked character of interaction, etc.), when realized within the NIS environment, transform into convergent processes that generate differentiated inclusive effects. Furthermore, as the degree of production creativity increases, its inclusiveness trends intensify, allowing creative industries to be viewed as a driver for expanding the participation of various economic entities and social groups in economic activity.

4) The statement on the clustering of creative industries as a mechanism for their development within the national innovation system, grounded in an original two-tier typology (structural-functional and spatial-functional) that demonstrates the alignment between the sectoral structure of creative industries and the forms of their territorial organization. This perspective allows creative clusters to be conceptualized as spatial-institutional ecosystems for the generation, transfer, and commercialization of creative products. Meanwhile, a comparative analysis of global practices shows that the performance of creative ecosystems is governed by the degree of alignment among their institutional, cultural, and innovative operational mechanisms.

5) The statement on the fragmented nature and systemic constraints of the institutional framework supporting the creative economy in the Republic of Kazakhstan, which are associated with the persistence of institutional gaps, sectoral fragmentation, misalignment of state support measures, and incomplete coverage of creative entities, thereby necessitating a transition toward a holistic institutional design for the sector.

6) The statement on the qualitative heterogeneity of Kazakhstan's creative sector, its extensive catch-up and asymmetrical development, the formation of a dual-circuit structure (a narrow high-productivity digital segment alongside a broad low-productivity traditional sector), high regional concentration, and the fragmentation of entrepreneurial activity and investment support, which received empirical verification based on a formalized assessment of structural imbalances using a system of composite indicators supplemented by correlation-regression analysis (based on 2017–2024 data).

7) The statement on the spatially differentiated nature of creative cluster formation in Kazakhstan, driven by the interplay of ethno-historical, cultural-symbolic, and innovative-technological factors, manifested in the coexistence of pre-cluster, transitional, and highly institutionalized forms, and accompanied by a mismatch between the high cultural potential of regions and the level of its institutional and technological implementation, leading to the concentration of developed clusters in major metropolises while leaving unrealized potential in the regions.

8) The statement on age inclusion as a systemic factor in the development of creative industries, asserting that engaging various age groups in the creative sector expands the human capital base, while its effect on economic outcomes is mediated through mechanisms of human potential formation and utilization, as confirmed by structural equation modeling results that revealed the significance of age structure and intergenerational interaction.

9) The statement on the integrated system of mechanisms for the development and support of creative industries, asserting that the advancement of the creative sector in the Republic of Kazakhstan requires the establishment of a framework of institutional and financial-economic mechanisms based on the creative capital lifecycle model and age inclusion mechanisms, thereby ensuring the alignment of development drivers within the NIS circuit and creating conditions for post-industrial inclusive growth.

**The theoretical significance of the dissertation research** lies in the development and refinement of scientific conceptualizations regarding the creative economy and creative industries as a complementary factor of the national innovation system in the context of post-industrial inclusive development. The study deepens the gnoseological analysis of the creative economy, clarifies its categorical framework, and expands theoretical and methodological approaches to analyzing the interaction of creative industries with elements of the national innovation system. The obtained findings contribute to the advancement of innovation theory, cluster theory, and the concept of inclusive economic growth, while establishing a foundation for further interdisciplinary research into the creative sector.

**The practical significance** of the study lies in the applicability of its results within the activities of public administration bodies, development institutions, and local executive authorities in formulating and implementing policies for the development and clustering of creative industries in the Republic of Kazakhstan. The proposed institutional and financial-economic mechanisms, alongside the integrative

model, can be utilized to update strategic and policy documents aimed at advancing the national innovation system and securing inclusive economic growth.

The study results are applicable to the elaboration of regional programs for supporting creative industries, the formation of creative clusters, and the expansion of economic participation across various age groups. The dissertation materials can be incorporated into educational processes and professional development programs for specialists involved in the development of the creative sector. The theoretical, methodological, and informational foundation of the dissertation research comprises the works of domestic and foreign scholars in economics; legislative and other regulatory legal acts of the Republic of Kazakhstan; articles from economic periodicals; statistical and analytical data from the Bureau of National Statistics of the Agency for Strategic Planning and Reforms of the Republic of Kazakhstan; analytical reports and expert assessments; as well as online information resources pertinent to the analyzed issue.

**Theoretical and methodological framework of the study.** In the theoretical part of the study, methods of positive, normative, comparative, and systemic analysis, synthesis, generalization, and abstraction were applied, alongside classification, typologization, and strategic analysis (SWOT) methods. Bibliometric analysis conducted using VOSviewer enabled the identification of the scientific field structure, thematic clusters, and research dynamics. The empirical section utilized a complex of economic-mathematical, statistical, and sociological methods: tabular and graphical techniques, analysis of absolute, relative, and average values, time-series analysis, structural-share and structural-dynamic analysis, comparative, correlation, and cluster analysis, relationship analysis, and the index method. The sociological toolkit encompassed questionnaire and expert surveys, as well as elements of qualitative analysis. Data analysis was executed using Partial Least Squares Structural Equation Modeling (PLS-SEM).

**Publications of Research Findings**. On the topic of the dissertation, the author has published 11 scientific papers, including 1 article in an international peer-reviewed journal indexed in the Scopus database ("Sustainability (Switzerland)" – Q1, 88th percentile), 3 articles in journals included in the List recommended by the Committee for Quality Assurance in the Sphere of Science and Higher Education of the Ministry of Science and Higher Education of the Republic of Kazakhstan (CQASSHE MSHE RK), 2 articles in peer-reviewed foreign journals, and 5 articles in the proceedings of international scientific and practical conferences in Kazakhstan and abroad.

Main works:

1. Khussainova, Z.; **Kankulov, M.**; Petrova, M.; Assanova, M.; Zhartay, Z.; Atabayeva, A.; Bektleyeva, D. The Potential of Youth and Older People’s Inclusion in the Sustainable Development of the Creative Economy // Sustainability. - 2024. - 16(10). – 4095.

2. Assanova M.K., Khussainova Zh.S., **Kankulov M.K.,** Zhartay Zh.M., Bektleyeva D.Ye. The potential of youth and older people's participation in the development of creative industries in Kazakhstan and the directions of its activation // Вестник Карагандинского Университета. Серия Экономика. – 2024. - № 3 (115).

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3. Хусаинова Ж.С., Асанова М.К., Бектлеева Д.Е., Абауова Г.М., **Канкулов М.К.** Концептуальные параметры креативной экономики и ее категориальная канва // Вестник Карагандинского Университета. Серия Экономика. – 2022. - № 3 (107). – С. 281-296.

4. Khussainova Zh.S., Assanova M.K., Bektleyeva D.E., Abauova G.M., **Kankulov M.K.** Conceptual approaches to the formation and development of creative industries in an inclusive economy // Bulletin of the Karaganda University. «Economy» series. – 2023. - № 1 (109). – P. 75-88.

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6. Хусаинова Ж.С., Асанова М.К., **Канкулов М.К.** Типологизация видов креативных индустрий // Пути повышения эффективности управленческой деятельности органов государственной власти в контексте социально-экономического развития территорий: материалы VII Международной науч.-практ. конф. ФГБОУ ВО «ДОНАУИГС». – Донецк: ДОНАУИГС, 2023. – С. 83-88.

7. Асанова М.К., Абауова Г.М., **Канкулов М.К.** Государственное обеспечение формирования креативных индустрий // Актуальные проблемы глобальной экономики. Материалы XXV Международной научной конференции молодых ученых. Москва: Издательство: Российский университет дружбы народов им. П. Лумумбы, 2023. – С. 101-104.

8. Khussainova Zh.S., Asanova M.K., **Kankulov M.K.** Stimulating the development of creative industries by harnessing the creative potential of young people // Synergy of science and business in the post-war restoration of Kherson region : Proceedings of the International scientific-practical conference. – In 2 vols.; Vol. 2 / edited by O. V. Chepeliuk. – Odesa: , 2023. - P. 399-404.

9. Асанова М.К., Абауова Г.М., **Канкулов М.К.** Факторы типовой направленности креативных индустрий // Проблемы устойчивого развития регионов Республики Беларусь и сопредельных стран : сб. статей XII Междунар. науч.-практ. конф./ под ред. Н. В. Маковской. – Могилев : МГУ имени А. А. Кулешова, 2024. – С. 51-54.

10. Хусаинова Ж.С., Бектлеева Д. Е., Абауова Г.М., Асанова М.К., **Канкулов М.К.** Институциональное обеспечение функционирования креативной экономики в Казахстане // Экономика и предпринимательство. – 2023. – № 8(157). – С. 96-102.

11. Хусаинова Ж.С., Бектлеева Д. Е., Абауова Г.М., Асанова М.К., **Канкулов М.К.** Методологические подходы к функционированию креативных кластеров в развитой рыночной среде // Экономика и предпринимательство. – 2023. – № 4(153). – С. 508-515.

**Approval and approbation of research results.** The main statements and findings of the dissertation research have been approved through peer-reviewed

publications and presented at international and national scientific and practical conferences.

**Structure and Scope of the Dissertation.** The structure of the dissertation comprises an introduction, three chapters, a conclusion, a list of references, and appendices. The dissertation contains 48 tables, 48 figures, 6 appendices, and a reference list comprising 201 titles.

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