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INVESTMENT ATTRACTIVENESS OF THE MECHANICAL ENGINEERING INDUSTRY OF KAZAKHSTAN

The article is devoted to the study of the investment attractiveness of the mechanical engineering industry in Kazakhstan. The development of mechanical engineering in Kazakhstan today is one of the priority areas, as the industry has social importance, providing high employment. Today, the government of Kazakhstan is implementing a number of measures to support domestic manufacturers, including free economic zones, preferential taxation and lending, quotas and grants for training, public investment.

On the part of the state, support for machine-building enterprises is provided within the framework of systemic measures aimed at the manufacturing industry.

The authors analyzed the dynamics of investment in the machine-building industry, indicators of import and export of goods of this industry, as well as analyzed the main factors important for foreign investors, including the potential costs.

It is noted that the mechanical engineering industry has significant potential to expand production and increase exports. Mastering the production of new products is possible on the basis of existing production facilities of existing domestic enterprises specializing in the production of similar nomenclature.

Sustainable development and reliable functioning of mechanical engineering largely determine the energy and material intensity of the economy, labor productivity, the level of environmental safety of industrial production and, ultimately, the economic security of the country.

Keywords: investments, machine-building industry, investment preferences, import, production, government support, manufacturing industry, investment attractiveness, export, economy.

Кілт сөздер: инвестициялар, машина жасау саласы, инвестициялық преференциялар, импорт, өндіріс, мемлекеттік қолдау, өңдеу өнеркәсібі, инвестициялық тартымдылық, экспорт, экономика.

Ключевые слова: инвестиции, машиностроительная отрасль, инвестиционные преференции, импорт, производство, государственная поддержка, обрабатывающая промышленность, инвестиционная привлекательность, экспорт, экономика.

Introduction. Over the years of independence, the Republic of Kazakhstan, having built an open market economy, has achieved a leading position in the Central Asian region in terms of economic volume and investment attraction, realizing its geopolitical potential, creating a transport corridor that connected the Eastern and Western continents, and is also a leader by criteria for economic and social development.

The share of Kazakhstan's GDP among Central Asian countries is more than 60%, or \$181.6 billion. The country's GDP share is 60% or \$181.6 billion, and its foreign trade turnover has reached \$85 billion. The country's GDP share is 60%, or \$181.6 billion, and its foreign trade turnover has

reached \$85 billion, which is 58% of the total trade turnover of all Central Asian countries [1].

As of today, the mining industry remains more attractive for attracting investment than manufacturing. For comparison, according to the National Bank of Kazakhstan, in 2018, there was 3.5 times more foreign investment (\$9.7 billion) in the mining industry than in the manufacturing industry (\$2.8 billion), and the mining industry was 3.6 times (4.4 trillion tenge) higher than the manufacturing industry (1.2 trillion tenge) in terms of capital investment. At the same time, enterprises in the mining industry are able to borrow from external financial sources on more favorable terms, which is also confirmed by the cost of credit resources in the domestic market

of the Republic of Kazakhstan. Thus, according to the National Bank of the Republic of Kazakhstan, in 2015 – 2018, the average interest rate on loans from second-tier banks for the mining industry was 9.4%, and for the manufacturing industry – 13.8%. Thus, imbalances in financing between the mining and manufacturing sectors persist.

In turn, to increase the efficiency and importance of manufacturing in the economy is possible only by focusing public resources and attention on the stimulation of manufacturing in exchange for reciprocal fulfillment of obligations on the part of the subjects of industrial-innovative activity and the expansion of co-financing opportunities through stock market instruments.

The purpose of the study is to identify the potential for development of the machine-building industry of Kazakhstan through the implementation of investment projects for which state support measures are provided, as well as promising areas in this industry, which are directly related to import substitution and export development.

Literature review. As part of the preparation of the article, scientific publications of both foreign and domestic authors who studied the issues of the investment climate were analyzed, laws and strategic documents regulating and determining the investment policy of Kazakhstan were also considered [2].

Consideration of issues of investment climate in machine-building industry is touched upon in the works of such authors as Shumeiko I., Kasenov A., Abishev K. [3]. Moreover, it is worth noting Russian scientists, Zaharov A., Novikova Yu. [4] and others who actively studied the problems of state regulation of investment activity.

Particular attention was paid to the definition of Lavrentiev D.S. [5], who believes that the main components of the investment attractiveness include not only the private properties and qualities of the object, but also the reaction of investors, and their willingness to work with the object of investment.

The information-empirical base of the study was the legislative and regulatory acts of the official statistical materials of the Committee on Statistics of the Ministry of National Economy [1]; program and reporting data of development institutions of Kazakhstan; materials contained in periodicals and information network of the Internet.

Main part. In the international ranking “Doing Business” 2020, Kazakhstan ranked 25th. Thus, such developed European and Asian countries as

Austria (27th place), Russia (28th place), Spain (30th place) and China (31st place) followed Kazakhstan in the ranking during the analyzed period. It should be noted that for some components of the rating, Kazakhstan is one of the leaders. For example, Kazakhstan ranks 4th among all countries in the “Enforcement of Contracts” indicator and 7th in the “Protection of Minority Shareholders” indicator.

In the overall structure of the gross domestic product of the Republic of Kazakhstan, the mining and metallurgical industry still plays an important role, forming together 13% of the country’s GDP.

At the same time, Kazakhstan’s manufacturing industry during the crisis associated with the spread of coronavirus infection demonstrated growth of more than 3% and the industry’s share in the total GDP amounted to 13%.

The government of Kazakhstan pays great attention to supporting the manufacturing industry, for the development of which a number of government programs have been introduced, such as the Business Road Map 2025, the Economy of Simple Things (a mechanism for lending to priority projects), and the Program to support small and medium-sized businesses engaged in manufacturing.

In the World Bank’s Doing Business Index for 2020, Kazakhstan rose to 25th place, surpassing many of the world’s leading economies. In particular, Kazakhstan ranks 4th in terms of compliance with contracts and 7th in the world for the protection of minority investors’ rights.

The Republic of Kazakhstan’s sovereign ratings remain stable. Fitch Ratings affirmed the country’s sovereign rating at ‘BBB’ with a ‘stable’ outlook noting that Kazakhstan’s public debt remains low and external and fiscal buffers have demonstrated resilience to shocks caused by the coronavirus pandemic and falling oil prices.

S&P Global Ratings also affirmed the Republic’s sovereign rating at ‘BBB’ with a ‘stable’ outlook. S&P forecasts Kazakhstan’s economy to grow by 3.2% in 2021 due to the easing of quarantine restrictions, higher oil prices coupled with an increase in production, as well as the recovery of the economies of its trading partners.

Moody’s notes that the country’s sovereign rating of “Baa3” with a “positive” outlook, assigned in 2019, is maintained and supported by the low level of public debt, significant reserves in foreign currency, high potential for economic growth and personal income and other factors that are buffers against external shocks.

Kazakhstan is an attractive economy for investment. The main reasons are, among others, its strategic location, favorable business environment, protection of investors' rights, investment incentives, political stability, rich raw material base and human capital.

In Kazakhstan, at the highest level attention is paid to the support of investors. The Council of Foreign Investors under the President of the Republic of Kazakhstan operates on a permanent basis.

In order to promptly solve the problems of investors, the Prime Minister of the Republic of Kazakhstan was appointed as the Investment Ombudsman[2].

The investment headquarters, chaired by the Prime Minister and composed of the heads of relevant state bodies, as well as the Council for Improvement of the Investment Climate under the Government of the country were established.

Also, the launch of the International Arbitration Center and the MFCA Court is an important initiative to ensure the rule of law and protect the rights of investors on the basis of English law.

Focusing on the world experience of attracting investments, there are 13 special economic zones in Kazakhstan, providing ready infrastructure and a wide range of investment preferences, as well as 36 industrial zones.

The system of state support of investors is multilevel and includes various sectoral benefits, as well as investment contract, under which investment projects are exempted from payment of corporate income and land taxes, as well as property tax.

Moreover, investors in Kazakhstan have been given the opportunity to directly enter into an investment agreement with the Government to implement major investment projects worth more than \$50

million. The investment agreement determines the types of investment preferences, the terms and conditions, and the procedure for their implementation.

It is worth noting that the provisions of the investment agreement remain valid for twenty-five years from the date of its conclusion in case of changes in the legislation of the Republic of Kazakhstan [2].

Strategic investors are entitled to reimbursement of up to 20% of the cost of construction and installation works and purchase of equipment excluding value added tax and excise duties. In addition, under the investment agreement strategic investors will be able to get tax vacations with regard to corporate income tax, property tax, land tax, as well as value added tax, if the project is implemented on the territory of the FEZ.

One of the priority areas of Kazakhstan's economy is the mechanical engineering industry, the volume of imports of which occupies a significant share of the country's market - about 40% of total imports. Thus, at the end of 2020, imports of engineering products totaled \$17.2 billion. This is due to the lack of a number of productions of mechanical engineering products, both high-tech and mass production. The fact that due to the low localization of a number of machine-building productions, large volumes of imports are supplemented by products of components for subsequent assembly at domestic production facilities is of no small importance.

The volume of production in the machine-building industry for the period January - December 2020 amounted to 1,807.4 billion tenge and in value terms increased by 32% [3]. Table 1 shows the indicators of the volume of production of the machine-building industry by sector.

Table 1

Dynamics of production volume by mechanical engineering sector for January-December 2019-2020, million tenge*

Industry Sector	January-December 2019	January-December 2020	FPI for January-December 2019 /2020, in %
1	2	3	4
Mechanical engineering	1 371 956	1 807 421	116,6
Manufacture of motor vehicles, trailers and semi-trailers	359 532	612 809	152,5
Manufacture of other vehicles	126 238	205 759	138,5
Manufacture of machinery and equipment n.e.c.	185 117	207 191	107,4
Manufacture of electrical equipment	148 440	174 527	100,8

1	2	3	4
Repair and installation of machinery and equipment	514 174	569 868	96,3
Manufacture of computers, electronic and optical products	38 454	37 267	89,9

* Data from the analytical report on the state of the machine-building industry of Kazakhstan for January-December 2020 [3].

Despite the imposition of a state of emergency due to the spread of coronavirus infection, the machine-building industry is showing growth.

The decline in production is observed in the sectors of repair and installation of machinery and equipment, as well as in the production of computers, electronic and optical products.

The successful performance of the automotive industry in 2020 was influenced by a number of effective steps taken both by the Government and relevant Ministries, as well as by domestic factories.

Global multinational investors were brought into production, and new brands emerged, including in the affordable segment. The industry reacted coherently, and most importantly, in a timely manner to the quarantine measures associated with the coronavirus pandemic, introducing online car sales and thereby maintaining the sales chain of manufactured products, as well as the availability of products to consumers. On the instructions of the Government, car registration points were opened in car dealerships, which was positively noted by car enthusiasts.

The programs of preferential car loans and leasing, which for a number of years allow Kazakhstani consumers and representatives of small and medium-sized businesses to purchase automotive equipment through an affordable financial instrument, played an important role [3].

The launch of new plants and production facilities in Kazakhstan should be considered the main industry events of 2020.

The machine-building industry has considerable potential for expanding production and increasing exports. Mastering the production of new products is possible on the basis of the existing production capacities of the existing domestic enterprises specializing in the production of similar nomenclature.

Such commodity groups as electrical equipment, oil and gas equipment, automobile industry, as well as other machines, equipment and machine

tools can be included among the priority product groups for mastering.

According to the results of 2020, the gross inflow of direct investments from foreign direct investors in the machine-building industry of Kazakhstan amounted to 141.2 million dollars.

In order to stimulate the development of the industry and increase its investment potential, the state provides a number of support measures provided by such development institutions as QazIndustry, Kazakhstan Development Bank, Industry Development Fund, Qaztrade, DAMU, KazakhExport, Baiterek and others.

According to the results of the analysis on the purchase of goods of the machine-building industry, the goods of constant demand were identified. Such goods include pumps, valves, compressors, tanks, pipes and fittings. In Kazakhstan, there are enterprises producing similar products, but their production volumes are not enough to cover the demand. Therefore, there is a great potential in investing in the production of these products, localization or opening of joint ventures [4].

Let's consider the prospects of investment in the machine-building industry on the example of the production of a group of goods of constant demand, compressors, which are used in various industries such as construction, metallurgy, energy, transport industry (automotive, aviation and railway), chemical industry, oil and gas extraction, service industries (workshops, tire service, medicine).

This group of goods is produced in Kazakhstan, but a significant part of the demand continues to be covered by imports.

According to the classification of the Commodity Nomenclature of Foreign Economic Activity by 4 characters (HS 8414), air compressors are among the top 20 imported goods in Kazakhstan. At the same time, the analysis of imported products by 6 characters (HS 841480), shown in Figure 1, taking into account the needs of industries, the average growth over the past 3 years has been 335% [6].

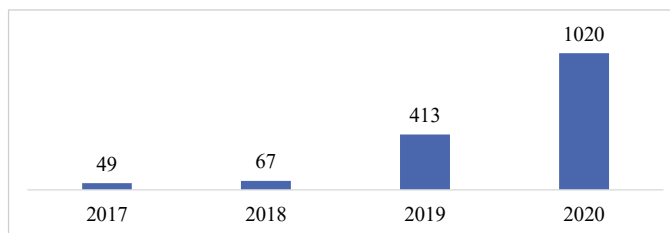


Figure 1. Imports of compressors (mln USD)

* Note: compiled by the author

Among the main potential costs for investors should be considered utility rates, the average wage in the region, as well as distances from the potential partner to neighboring countries [7].

Wages in the manufacturing industry are 11% higher than the average wage in Kazakhstan and

amount to 258 thousand tenge (for 2020). At the same time, the highest salaries (for all sectors) are observed in the two oil regions and the cities of Nur-Sultan and Almaty: 248 - 368 thousand tenge. Table 2 shows indicators of average wages in Kazakhstan. Over the last 5 years the growth of wages has increased by 60%.

Table 2

Average Wages in Kazakhstan by Region*

Region	Wages (tenge)
Atyrau region	367 799
Mangistau region	317 611
Nur-Sultan	302 504
Almaty	247 951
Karagandy region	203 806
West-Kazakhstan region	195 410
East-Kazakhstan region	190 287
Pavlodar region	187 427
Aktobe region	182 923
Kyzylorda region	178 174
Kostanay region	171 319
Almaty region	168 313
Akmola region	168 302
Shymkent	161 329
Turkestan region	158 762
North Kazakhstan oblast	157 497
Zhambyl region	156 846

* Data of the Statistics Committee of the Ministry of National Economy of the Republic of Kazakhstan [1].

The lowest prices for 1 kWh of electricity are observed in East Kazakhstan region, Nursultan city, Pavlodar region, West Kazakhstan region and Aktobe regions: 14.48-16.96 tenge.

Kazakhstan's export potential of air or gas compressors is realized due to the Russian market (about 800 thousand US dollars annually, while in 2018-2019 exports averaged 1300 US dollars), where a significant part of the products is supplied, as well as to the markets of Kyrgyzstan and Uzbekistan.

Despite the significant stable demand for these products in China, this market is difficult for local manufacturers to master due to non-tariff regulation of the market. Meanwhile, thanks to Kazakhstan's participation in the Customs Union, the markets of Russia, Belarus, Armenia, and Kyrgyzstan remain attractive due to the absence of import customs duties and affordable logistics. Thus, over the past 5 years, products worth 2.8 million US dollars or 0.6 million US dollars annually have been imported to Russia.

Potential markets are determined by water supply systems, construction, coal, oil and gas, chemical and food industries.

The oil and gas and energy industries account for a significant part of sales. Given the raw material orientation of Kazakhstan's economy (more than 70% of exports are hydrocarbons and subsoil), there is always a stable demand for the products [8].

The Entrepreneurial Code of the Republic of Kazakhstan defines legal, economic and social conditions and guarantees ensuring freedom of entrepreneurship in Kazakhstan, as well as mechanisms to protect the interests of investors.

Production of mechanical engineering products is included in the list of priority activities. Thus, potential investors in the framework of conclusion of an investment contract may receive additional investment preferences. Such as: exemption from customs duties, state grants, exemption from VAT on import of equipment, exemption from corporate income, land and property tax. Moreover, in case of realization of production on the territory of the Special Economic Zone or Industrial Zone, investors can benefit from a number of additional preferences.

Figure 2 below presents a SWOT analysis of factors important to foreign investors.

Figure 2

SWOT analysis of the main factors important for foreign investors*

Strengths	Weaknesses
<ul style="list-style-type: none"> • Ensuring product demand due to a wide sales market; • Diversification by consumers. • Developed logistics throughout the territory of Kazakhstan and abroad. • Investment preferences 	<ul style="list-style-type: none"> • High capital costs of the project. • Lack of own sales channels. • Limited range of products in the first years.
Opportunities	Threats
<ul style="list-style-type: none"> • Constant demand: the raw material orientation of the economy determines the development of necessary equipment for oil production and transportation. • Production of quality products of demanded assortment. • Common customs zone of Kazakhstan, Russia and Belarus. 	<ul style="list-style-type: none"> • The risk of untimely delivery or under-delivery of raw materials.[9] • Strong dependence on raw material partners. • Lack of scientific and technical base.

* Compiled by the author

Conclusion. The country's stable position in international rankings, as well as statistics on foreign investment attraction confirms the high investment attractiveness of the Republic of Kazakhstan. So for the period from 2005 to 2020 the inflow of foreign direct investment amounted to 365 billion dollars [9]. Active investment also remains in the mechanical engineering sector. Foreign investments are an effective catalyst of industrial and innovative development of the country. In his message, the Head of the State Kassym-Jomart Tokayev clearly outlined measures and priorities of investment policy implementation. The full open-

ing of the industrial and non-resource potential of Kazakhstan's economy, including taking into account foreign investments and technologies, remains at the head of the cornerstone.

The successful development of industry and increase of export potential require a systematic approach and reasonable application of all available state support tools. The main principles should be: clear targeting and socio-economic feasibility of state support in order to identify the most promising subjects of entrepreneurial activity in the manufacturing industry, as well as effective and timely distribution of state financial resources.

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ҚАЗАҚСТАННЫҢ МАШИНА ЖАСАУ САЛАСЫНЫҢ ИНВЕСТИЦИЯЛЫҚ ТАРТЫМДЫЛЫҒЫ

Андатпа

Мақала Қазақстандағы машина жасау саласының инвестициялық тартымдылығын зерттеуге арналған. Қазақстанда машина жасауды дамыту бүгінгі күні басым бағыттардың бірі болып табылады, өйткені сала халықты жоғары жұмыспен қамтамасыз ете отырып, әлеуметтік маңызға ие. Бүгінде Қазақстан Үкіметі отандық өндірушілерді қолдаудың бірқатар шараларын іске асыруда, олардың ішінде еркін экономикалық аймақтар,

жеңілдікпен салық салу және кредит беру, оқуға арналған квоталар мен гранттар, мемлекеттік инвестициялар. Мемлекет тарапынан машина жасау кәсіпорындарын қолдау өңдеуші өнеркәсіпке бағытталған жүйелі шаралар шеңберінде көрсетіледі.

Авторлар машина жасау саласындағы инвестициялар серпініне, осы саладағы тауарлардың импорты мен экспортының көрсеткіштеріне талдау жасады, сондай-ақ шетелдік инвесторлар үшін маңызды негізгі факторларға, оның ішінде әлеуетті шығындарға талдау жасады.

Машина жасау саласы өндірісті кеңейту және экспортты ұлғайту үшін айтарлықтай әлеуетке ие. Жаңа өнім өндірісін игеру ұқсас номенклатураны өндіруге маманданған жұмыс істеп тұрған отандық кәсіпорындардың қолда бар өндірістік қуаттары негізінде мүмкін болады.

Машина жасаудың орнықты дамуы мен сенімді жұмыс істеуі көбінесе экономиканың энергия сыйымдылығы мен материал сыйымдылығын, еңбек өнімділігін, өнеркәсіптік өндірістің экологиялық қауіпсіздігі деңгейін және, сайып келгенде, елдің экономикалық қауіпсіздігін анықтайды.

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ИНВЕСТИЦИОННАЯ ПРИВЛЕКАТЕЛЬНОСТЬ МАШИНОСТРОИТЕЛЬНОЙ ОТРАСЛИ КАЗАХСТАНА

Аннотация

Статья посвящена исследованию инвестиционной привлекательности отрасли машиностроения в Казахстане. Развитие машиностроения в Казахстане на сегодняшний день является одним из приоритетных направлений, поскольку отрасль имеет социальную значимость, обеспечивая высокую занятость населения. Сегодня Правительство Казахстана реализует ряд мер поддержки отечественных производителей, среди которых свободные экономические зоны, льготное налогообложение и кредитование, квоты и гранты на обучение, государственные инвестиции.

Со стороны государства поддержка предприятий машиностроения оказывается в рамках системных мер, направленных на обрабатывающую промышленность.

Авторами проведен анализ динамики инвестиций в машиностроительную отрасль, показателей импорта и экспорта товаров данной отрасли, а также проанализированы основные факторы, важные для зарубежных инвесторов, в том числе потенциальные затраты.

Отмечается, что отрасль машиностроения имеет значительный потенциал для расширения производства и увеличения экспорта. Освоение производства новой продукции возможно на базе имеющихся производственных мощностей существующих отечественных предприятий, специализирующихся на производстве аналогичной номенклатуры.

Устойчивое развитие и надежное функционирование машиностроения во многом определяют энергоемкость и материалоемкость экономики, производительность труда, уровень экологической безопасности промышленного производства и, в конечном итоге, экономическую безопасность страны.

