

**Who Sets the Agenda? Analyzing key actors and dynamics of
economic diversification in Kazakhstan throughout 2011-2016**

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Abstract

This paper attempts to answer the key question – who sets the agenda for economic diversification in the context of Kazakhstan? This question generally remains critical in current scholarly debates. Although Kazakhstan, a young post-Soviet developing nation, has received a fair amount of scholarly attention with regard to the agenda-setting stage of the policy cycle, the existing literature has yet failed to 1) empirically establish who actually sets the agenda for a certain policy issue, and 2) employ the Internet research methods. This paper seeks to fill these gaps. The literature review of Kazakh-context agenda-setting publications suggests that among the major actors, the government (including the Prime Minister office and President) tend to exert predominant influence, though other actors may also play a role, such as media and academia. As driven by Internet penetration rate data, this research focuses on the period from Jan 2011 to Dec 2016.

The findings suggest two vital outcomes. First, the think tank community appears to set government agenda for economic diversification policy in Kazakhstan. Second, the government, while exhibiting the larger agenda-setting magnitude vis-à-vis the other actors, shapes the subsequent debates as measured by the number of relevant references in media, think tank, and academic publications. This research seeks to contribute to existing agenda-setting theory in the internet era by defining the most important actor(s) specifically in Kazakh context based on longitudinal dynamics in attention.

I. Introduction

The theme of economic diversification often becomes an agenda item across developing nations (Konkakov & Kubayeva 2016, Davies 2012). This issue has also been high both on political (Strategy2050.kz, 2014) and policy (Toxanova 2008) agendas in Kazakhstan recently. Regarding its political importance, in 2012 Kazakh President N. Nazarbayev adopted the Kazakhstan 2050 strategy, which envisions widespread economic and political reforms in the country, with specific focus on diversification of industries (by creating new cutting-edge industries, e.g. electronics, laser and medical, and expanding existing transportation links), diversifying export capacities away from oil and gas (Weitz 2014), transforming Kazakhstan into a knowledge-based diversified economy (based on improved infrastructure and human capital), and shaping budgetary policy to divert financial resources to support long-term national projects aimed at boosting economic diversification and infrastructure development (Strategy2050.kz, 2014). The economic diversification theme came to agenda-setting prominence in the context of the Third Modernization of Kazakhstan (Seisembayeva 2017). “The first one was the creation of an entirely new state based on the principles of a market economy. The second was the implementation of the Strategy 2030 and the creation of our country’s capital, Astana,” according to President N. Nazarbayev (as cited in Seisembayeva 2017). A key priority within the Third Modernization is technological advancement based on digital technologies, as part of a broader goal to join the top 30 most developed nations (ibid).

The present paper focuses on the agenda-setting stage of the policy process. Defined as the first and most critical stage of the policy process (Howlett et al. 2009)

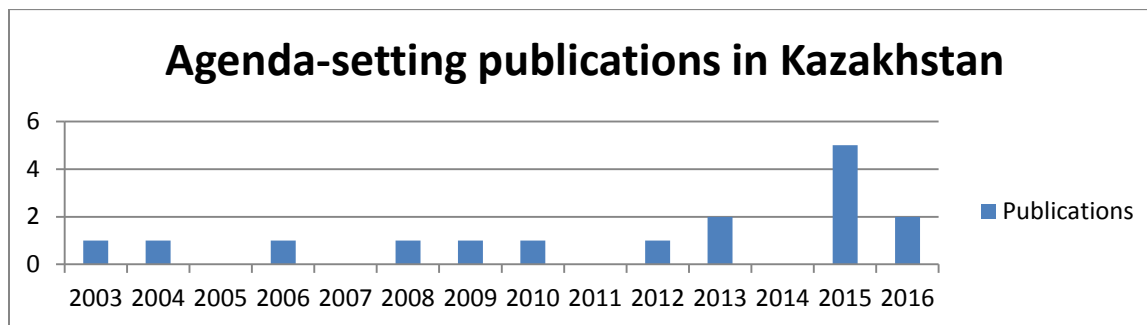
that determines its subsequent stages (Peters 2015), agenda-setting contributes to a more nuanced understanding of media's role in society (Carragee et al. 1987, as cited in Rogers et al. 1993). Among the multiplicity of actors involved in this stage of the policy process, such as the public, interest groups, NGOs, scholarly and think tank communities among others, it is media that often appears to play a predominantly vital role in setting policy agendas, as suggested by current debates in the field (e.g. McCombs & Shaw 1972; Iyengar & Simon 1993; Wood & Peake 1998), although the public's role has become stronger since the emergence of online resources, e.g. internet, and their increasing use among scholars (see e.g. Margetts et al. 2016 on their account of citizens increasingly empowered by social media to push their collective action agendas; Green-Pedersen & Mortensen 2013 noting that as an issue reaches the macro-political agenda stage, it is public opinion and party contestation that drive policy change; Wlezien & Soroka 2016 referring to active voters who really drive policy agenda etc.). Furthermore, as the literature review on agenda-setting in Kazakhstan suggests, the President and government appear to be key actors in setting a variety of policy issues both in the country (e.g. Novikova 2015 on CSR¹ policies, Mukhtarova et al. 2013 on anticorruption issues, Koch 2013 on urban modernization agenda etc.) and the Central Asian region (e.g. Tucker 2015 on the role of key political figures, along with media, in shaping public sentiments toward ISIS; Schatz 2009 on political elites' power in framing debates and defining policy agendas etc.). Thus, to define who actually sets the agenda, it needs to be tested by contrasting and comparing the role of (online) media vis-à-vis the public, think tanks, academia, and the government in agenda-setting for economic diversification in Kazakhstan over the period of 2011-2016.

¹ Corporate social responsibility (CSR)

II. Literature review of agenda-setting publications in Kazakh context

Despite the relatively short period since Kazakhstan gained its independence since late 1991, there is a fair amount of publications worth analyzing related to the agenda-setting stage of the policy process in Kazakhstan. The total number of related publications generated by using Scopus and Google Scholar engines [and further filtered for relevance] is 16 (see Appendix 1 for the complete list of relevant publications). Although the time span extends from 2003 to 2016, relevant scholarly attention to the Kazakh context has largely begun to increase recently, i.e. around 2013-2016 (Figure 1 below). Thus, the present research is reflective of the timely scholarly attention to agenda-setting in the context of Kazakhstan, besides the general importance of the agenda-setting stage in the policy process.

Figure 1 Publications related to agenda-setting in Kazakhstan, by year



Source: The author's own analytics

The Kazakh context-based agenda-setting publications can be generally grouped not only based on the policy issues analyzed (e.g. CSR as in Novikova 2015, corruption as in Mukhtarova et al. 2013, social conflicts as in Ibrayeva 2015, water reform in Central Asia as in Abdullaev & Rakhmatullaev 2016 and transboundary rivers as in Wegerich 2010, strengthening state capacity as in Cummings & Nørgaard 2004 etc.) or

by year of publication (as in Figure 1), but, more importantly, in terms of the key actors found to play a strong role in setting policy agenda in the context of Kazakhstan.

Eight of the 16 publications analyzed highlight the importance of President and his/her leadership in setting political and policy agenda in Kazakhstan (Koch 2013, Mukhtarova et al. 2013, Schatz 2009, Schatz 2008), political elites and politicians (Tucker 2015, Cummings & Nørgaard 2004), and government (Novikova 2015, Knox & Yessimova 2015). The remaining publications emphasize the role of the following key actors in Kazakh agenda-setting: intergovernmental committees (i.e. the Interstate Commission for Water Coordination in the context of Central Asian transboundary water issues, as in Wegerich 2010) and international organizations (Cleuziou & Dierenberger 2016 on gender issues, and Asanova 2006 on Asian Development Bank's influence in education policymaking), foreign governments (i.e. the government of Russian Federation attempting to set energy policy agenda in the Caspian Basin nations of Kazakhstan, Turkmenistan and Azerbaijan with varying degrees of success, as in Stulberg 2003), media (i.e. Akhmet et al. 2015), social media (Ibrayeva 2015), academia (Abdullaev & Rakhmatullaev 2016), and networks (i.e. the currently weaker role of HR management associations in shaping economic development agenda in Kazakhstan but which should eventually become more pronounced, as in Davis 2012).

Among the sources analyzed as part of the literature review, the following three papers merit closer scrutiny: Davis (2012), Akhmet et al. (2015), and Ibrayeva (2015). To begin with, Davis 2012 looks into the role of human resource managerial associations in driving economic policy agenda in Kazakhstan, specifically as a potential factor in leading the nationwide efforts in the context of economic diversification.

However, he rather asserts the potentially strong role that HR associations should play in promoting economic diversification agenda, instead of carefully analyzing their capacity versus other key players, such as the government and President (as suggested by the literature review), academia, think tanks, media and the public.

Second, both Ibrayeva (2015) and Akhmet et al. (2015) use content analysis as applied to social conflicts and diplomatic bilateral relations with Malaysia, respectively. Ibrayeva (2015) employs content analysis to analyze a wide range of issues on the Facebook platform – 2015 money devaluation, sport achievements, the 2015 mudslide in Almaty, corruption and court processes etc. – based on netizens' positive, negative or neutral perceptions. Furthermore, she also divides publications into Kazakh- versus Russian-language media to trace variations in public perception (ibid.). In a different manner, Akhmet et al. 2015 use the content analysis method to focus on a single issue – the 2012 state visit of Kazakh president Nazarbayev to Malaysia – by looking into the prevalent news frames in covering the topic by Kazakh and Malaysian newspapers. There are a number of important caveats that should be highlighted. First, the authors selected only two newspapers for each country in their analyses: Malaysian English outlets, *The Star* and *New Strait Times*, and Kazakh newspapers, *Sovereign Kazakhstan* and *Kazakhstani Truth* (ibid.). This obviously raises the issue of selection bias. Second, by focusing exclusively on a narrow selection of print media sources, such an approach ignores the vast potential that online media and internet research offer in terms of analytic insights. Last but not least, akin to Davis (2012), who simply asserts the potentially strong role of HR network groups in economic policy, Akhmet et

al. (2015), referring to McCombs (2004), assert the robust role of media in “forming public opinions and political attitudes” (p.165) by framing certain issues.

The present paper attempts to take a similar approach as in Akhmet et al. (2015) by focusing on a single policy issue that is economic diversification. To fill a persistent gap of ignoring online media and internet tools in analyzing policy issues in the context of Kazakhstan, this paper seeks to embrace all possible online newspapers and other Internet-based media sources by using Lexis Nexis (more in Section III below).

III. Data and Methods

The major research question the paper seeks to explore is the following:

- Who sets the agenda for economic diversification policy related issues in the context of Kazakhstan over the time span of 2011-2016? This needs to be empirically established based on comparing and contrasting the agenda-setting power of the wider public and media (collectively referred to as “non-experts”), academia and think tank communities (collectively “experts”), and the government. This research will take advantage of the inductive nature of the content analysis method (using NVivo), analyzing some of the specific nodes that will emerge in the analysis process, e.g. common and divergent patterns for the issue analyzed.

The six-year time span is defined on the basis of evolving internet penetration rates in Kazakhstan. Specifically, as Table 1 below exhibits, the share of Kazakh population with access to the internet jumped from a critically low 32% in 2010 to a rather adequate level of 50.6% by 2011, which then reached around 56% by 2016. To compare, for instance Özdemir 2012 applies social media in the context of online campaigns in Turkey, with the internet penetration level being 45% in 2012 and 43% in

2011 (Internetlivestats.com 2016). Kazakhstan's fixed internet penetration rate of 56% in 2016 is comparable with the rate of Turkey, at 58% (Internetlivestats.com 2016), which now witnesses further proliferation of online research applications (for instance, see Chadwick & Sengül 2015 for unemployment; Ozan-Rafferty 2014 using online research for medical tourism, Demirdogen et al. 2010 on Turkish online banking etc.). Moreover, reflective of evolving online research conducted in Kazakhstan (e.g. Sultanov 2016; Tyson et al. 2015; Dyussenov 2016, etc.), the country is highly positioned in UN e-government rankings, 28th in 2014 globally (Egov.kz 2014), and 33rd in 2016, while ranked 7th in Asia (Inform.kz 2016). Finally, in terms of ICT development index, Kazakhstan is ranked 58 in 2015 (up from 62 in 2010), compared to 61 for Brazil, 64 Malaysia, and 69 Turkey (ITU 2015). Thus, when compared to other developing nations, Kazakhstan appears quite well suited for conducting online research.

Table 1 Internet penetration levels in Kazakhstan, 2005-2016

Year	Internet Users**	Penetration (% of Pop)	Total Population	Non-Users (Internetless)	1Y User Change	1Y User Change	Population Change
2016*	9,961,519	55.8 %	17,855,384	7,893,865	1.8 %	176,681	1.31 %
2015*	9,784,837	55.5 %	17,625,226	7,840,389	2.6 %	249,555	1.46 %
2014	9,535,283	54.9 %	17,371,621	7,836,338	3.3 %	301,528	1.59 %
2013	9,233,755	54 %	17,099,546	7,865,791	3 %	265,284	1.65 %
2012	8,968,471	53.3 %	16,821,455	7,852,984	7.1 %	591,993	1.61 %
2011	8,376,478	50.6 %	16,554,305	8,177,827	62.5 %	3,222,321	1.49 %
2010	5,154,157	31.6 %	16,310,624	11,156,467	75.9 %	2,224,256	1.32 %
2009	2,929,901	18.2 %	16,098,356	13,168,455	67.4 %	1,179,145	1.15 %
2008	1,750,756	11 %	15,915,966	14,165,210	176.4 %	1,117,396	1.02 %
2007	633,361	4 %	15,755,242	15,121,881	24.2 %	123,395	0.98 %
2006	509,966	3.3 %	15,603,072	15,093,106	11.4 %	52,330	0.98 %
2005	457,636	3 %	15,451,752	14,994,116	12.9 %	52,272	1.03 %

* Estimate for July 1, 2016

** Internet User = individual who can access the Internet at home, via any device type and connection.

Source: *Internetlivestats.com (2016)*

The data analyzed will be collected using the following sources:

a) *The Google search engine filtered for blogs, as well as www.blogsearch.com, with the time span from January 1, 2011 to December 31, 2016. The goal of using this tool is to generate data, which include the content of e-blogs and readers' comments*

posted on media web-sites, to trace the attention dynamics of the public to economic diversification in Kazakhstan, by year. Furthermore, readers' comments to media articles will be also generated by using *Google Search filtered for news* (see below). The total number of mentions serve as the *proxy for public attention*. To collect and analyze mentions, the following Google commands are used:

- Commands “экон* әртаралтандыру (economic diversification) AND Қазақстан” (Kazakhstan) in Kazakh, “экон* диверсиф* AND Казахстан” in Russian, and “econ* diversif* AND Kazakhstan” in English will be used to capture mentions on economic diversification in Kazakhstan among Kazakh and Russian speaking parts.

b) *The Google search engine filtered for news* is employed to trace relevant media articles. The data collected, primarily including relevant publications by both local and international media sources, thereby serve as *the proxy for media attention dynamics*. Similar Google search commands, as outlined above for *Google search filtered for blogs*, will be employed. Those media publications found to include readers' comments as related to the issue will be employed to trace public attention.

c) *Scopus database* and the *Google Scholar engine* are employed to generate academic publications over the period. Furthermore, some publications may be generated by using *Google Search filtered for news*. These data would serve as a *proxy for academia and scholarly attention* to the issue analyzed. To search for “economic diversification” in Kazakhstan, the following command is employed: “econ* diversif* AND Kazakhstan” (Figure 2), which then produces eight academic publications by Scopus, and nine by Google Scholar, as a result. Furthermore, the search of think tank articles on KIMEP University's web-site resulted in two academic publications.

Figure 2 Scopus interface

Source: Scopus (2017)

d) To collect data on think tank attention dynamics, their respective web-sites will be analyzed. Google search led to the selection of the following key Kazakhstan-based think tanks for analysis: the Kazakhstan Institute of Strategic Research (www.kisi.kz), Kazakhstan Center of Humanitarian and Political Trends (sarap.kz), KIMEP University (kimep.kz), Nazarbayev University (nu.edu.kz), the Institute of World Economic and Politics (iwep.kz), and the Economic Research Institute (<http://economy.kz/>). Additional publications may emerge by using *Google Search filtered for news*. Relevant documented mentions of economic diversification will be collected and analyzed. It is worth noting here that almost all the above-listed think tanks produced relevant publications, except KIMEP University, which produced none think tank articles, but two academic publications dated 2013.

e) Adilet.kz parliamentary legal database (Adilet 2017), with the time span from January 1, 2011 through December 31, 2016 is used to generate data on the number of laws related to economic diversification adopted over the period. The database captures all legal and normative acts, presidential decrees and other relevant documents. Furthermore, major government programmes and documents will be captured and analyzed by tracing media, think tank and academic publications in their references to

specific initiatives on economic diversification. The data collected serve as a *proxy for government's attention* to the issue, which will be aggregated to observe its relation to the trends of public and media attention, and academia and think tank attention trends.

The present research proposes the following units of analysis: an *online article*, or a piece of *e-document* (for media and the government) identified in the process of using the Google search engine; a *blog post*, or *comment* (the public); and an academic and think tank *publication* (or *abstract/summary*) related to economic diversification.

It should be noted that the use of these units of analysis is not novel. For instance, Murray (1991) analyzed *e-documents* used for person-to-person (online network) interactions, and developed cognitive and context-specific strategies to write personal computer documents in a study of an IBM manager and his staff (as cited in December 1996). To cite more recent examples, Schäfer, Ivanova & Schmidt (2014) track news coverage of climate change issues across Australia, Germany, and India by using *news articles* as a unit of analysis. Similarly, Lörcher & Neverla (2015) analyze climate change attention dynamics of online German news media by using *news samples* derived from "Spiegel.de" and "Welt.de", as well as *readers' comments* (both on news websites and e-blogs) as units of analysis. Furthermore, Anderson, Brossard & Scheufele (2012) track the attention cycle of (online and print) media coverage of an academic publication on the lethal case of Chinese workers resulted from lung damage and exposure to nanoparticles, in which they find that while traditional print media produces negligible mentions of the event, online media devotes greater attention measured in terms of news coverage. The article also suggests that online media may follow its own attention cycle vis-à-vis print media with regard to controversial events

driven by academia. This also raises an important implication for the present research, i.e. regarding the possible use of academic publications as a unit of analysis, in this case for tracing academic attention over time.

IV. Analyses

This section presents analyses of relevant documented publications and mentions related to economic diversification in the context of Kazakhstan over the period from January 1, 2011 to December 31, 2016. Divided into two broad parts – quantitative analysis and qualitative (content) analysis – it seeks to analyze and contrast these publications and mentions made by each of the key actors over the period.

4.1 Quantitative analysis

a) **Experts.** The search for relevant academic and think tank publications reveals the following trends. First, academia produces the total of 20 publications over the period, including 3 in 2016, 2015, and 2014, followed by 7 in 2013, and 4 in 2012 (see Table 2 below). Second, the think tank community generates 54 relevant publications with the following break-down by year: 17 in 2016, 14 in 2015, 6 in 2014, 5 in 2013, 8 in 2012 and 4 in 2011 (Table 2 below). Thus the total number of expert publications is 74.

b) **Non-experts.** The use of search engines as described above leads to the total of 83 media articles selected for analysis. These include 35 articles in 2016, 24 in 2015, 9 in 2014, 8 in 2013, 3 in 2012, and 4 in 2011. The search for public sentiments did not result in any e-blog content but only included readers' comments on specific media articles (12), as well as think tank publications (2). Thus the total number of non-expert publications over the period is 85. The total number of publications and articles with public comments is 14, including 12 "public/media" articles and two "public/think tank"

publications. The total number can be broken down by year, which include 5 in 2016, 4 in 2015, 2 in 2014, and one for 2011, 2012 and 2013 each.

c) **Kazakh Government.** The analysis of *adliet.kz* database reveals the total of 103 legislative documents (such as decrees, drafts, directives, modifications etc.) over the period. Further filtered for substance and relevance, the number is trimmed down to 38. Furthermore, another 5 government program documents are added based on references made by media, academic and think tank publications and articles. Thus, the total number of government documents selected for analyses is 43. This includes 6 in 2016, 6 in 2015, 12 in 2014, 8 in 2013, 6 in 2012 and 5 in 2011. It is worth noting that in terms of the key bodies, these documents are adopted either by Kazakh government (headed by Prime Minister), or by the President. Table 2 summarizes the number of relevant publications and mentions by each of the key actors by year.

Table 2 The total number of publications/articles and mentions on economic diversification in Kazakhstan among the key actors over the period 2011-2016

		2011	2012	2013	2014	2015	2016	Total
Experts	Think tanks	4	8	5	6	14	17	54
	Academia	-	4	7	3	3	3	20
	TOTAL:	4	12	12	9	17	20	74
Non-experts	Media	4	3	8	9	24	35	83
	The public	1	1	1	2	4	5	14*
	TOTAL:	4	3	8	10**	24	36**	85**
	Government	5	6	8	12	6	6	43

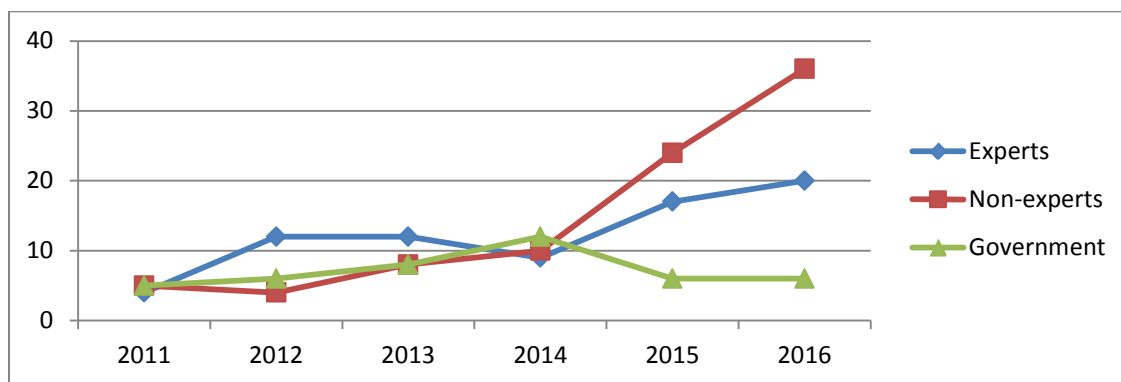
Source: The author's own analytics

* This includes 12 publications generated by media and 2 by think tanks.

** These numbers include 2 publications generated by think tanks, one in 2014 and one in 2016.

Table 2 demonstrates interesting observations. Indeed, over the 6-year period it is largely the *experts*, i.e. both think tanks and academia together, that appear to actually precede the attention of *non-experts*, i.e. media and the public, and the *government*, to the issue: the *experts* first paid increasing attention in 2012-2013, with the *think tank* community producing 8 publications in 2012 (a twofold increase vis-à-vis 2011) and then *academia* producing 7 publications in 2013 (from 4 in 2012). On the other hand, in terms of the total number of publications, *non-experts* produced a larger number i.e. 85, versus *experts* (74 publications), and the *government* of Kazakhstan (43) in 2011-2016. In other words, though the *experts* seem to set the agenda to economic diversification, *non-experts* demonstrate a higher degree of overall activity related to the issue. Last but not least, the government occupies the middle ground (with 12 legal documents adopted in 2014), following the *experts* but preceding *non-experts*. To better visualize the patterns in attention to the issue, Figure 3 below is helpful.

Figure 3 Attention dynamics of experts, non-experts and government, 2011-2016

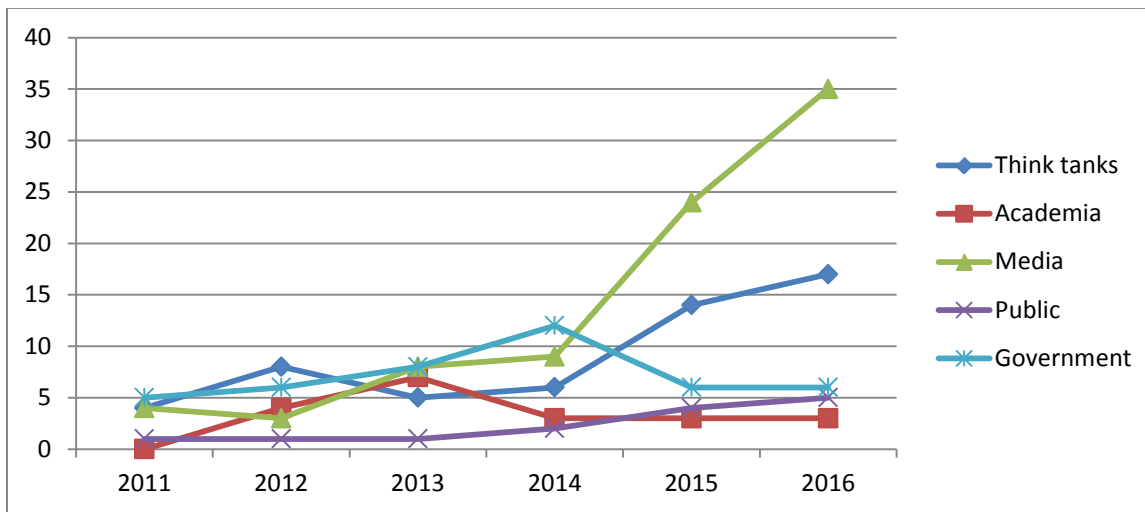


Source: The author's own analytics

As Figure 3 suggests, not only that *experts* set the agenda for the issue but the other two players – *non-experts* and *government* – exhibit different trajectories. The *government*, while showing a spike in the number of adopted legislative documents in

2014, declined in its activity again by 2015-2016, as was the case in 2011-2012. *Non-experts*, on the other hand, while dormant in 2011-2014, disproportionately react with their attention spikes of 24 and 36 pieces in 2015 and 2016 respectively. Finally, as the *experts* continue to show growing attention trends in 2015-2016 and provided that their agenda-setting power remains valid in the years to come, then it should be anticipated that *non-experts* will continue to show high attention trends comparable with, if not higher than, their 2015-2016 levels, and the *government* should resume its legislative activity as related to economic diversification policies. To better observe specific variations in attention trends among all the key actors, Figure 4 is presented below.

Figure 4 Attention dynamics among all actors, 2011-2016



Source: The author's own analytics

Overall, as Figure 4 above shows, while *experts*, *non-experts* and the *government* exhibit some degree of change in attention to the issue, the public largely remains dormant over the period, with a slight take-off around 2015-2016. One possible explanation is that economic diversification had not captured the interest of the public. For instance, the search for public sentiments did not return any results on relevant e-

blogs but only readers' comments posted on media and think tank publications. Another is the use of online research methods which are likely to exclude some part of Kazakh population out of analyses due to still growing Internet penetration rates (Table 1). This tentative finding is similar to the corruption agenda-setting context in Thailand (Dyussenov 2017), where the public is also found to be rather dormant. Two things are worth noting – first, the public includes both local and international netizens since it can be challenging to clearly differentiate between these subgroups using online research methods; second, as the internet penetration rates in Thailand over the period is lower than in Kazakhstan varying from 24% in 2011 to 43% in 2016 (Internetlivestats.com 2016, as in Dyussenov 2017) versus 51% in 2011 and 56% in 2016 as related to Kazakhstan, the inability of online research method use to capture parts of local population becomes less plausible (although not entirely improbable).

Another interesting observation as suggested by Figure 4 is that among the *experts* it is *think tanks* that seem to precede *academia*. Yet it is also important to account for possible time lags due to academic publications' review processes. For example, as Björk & Solomon (2013) suggest, the period between the date received by a publisher and the date of publication is 14.1 month for social science papers. Thus, both think tanks and academia may roughly coincide around 2012 (again, accounting for 1-1.5 year publication lags for academia). However, at a later stage (2015-2016) think tanks demonstrate a higher degree of attention to the issue than academia. However, to observe whether think tank discourse on economic diversification actually influences academia's, media's, the public's and government's discourse over time or to observe some of the other actor's influence on another, it is necessary to conduct

qualitative content analysis of actual publications, by analyzing specific codes used, analyzing the sectors and industries where diversification is defined as necessary to pursue, types of economic diversification etc.

4.2 Qualitative content analysis

Content analysis (using NVivo) of relevant publications for each of the key actors leads to selection of the following nodes: *causes and effects*, *types of diversification*; *key industries defined*, and *key actors* (Appendix 2). A cause should be understood in broad terms, as a factor that a certain actor believes should influence the development of economic diversification in Kazakhstan, as contrasted with a more specific definition of establishing causality by using statistical regression, while an effect is what economic diversification should lead to. The *types of diversification* node as defined by actors is broken down into product, market, industry diversification, and diversifying the energy sector, and single-industry towns. The notion of key industries includes those industries where each of the actors believes economic diversification is important and thus should be pursued. Finally, the *key actors* node embraces a set of those actors (not necessarily included for analysis, e.g. international organizations) that each of the actors believes should drive the economic diversification policy in the context of Kazakhstan.

First, as Appendix 3 demonstrates, with regard to *causes and effects*, think tanks (13 causes, 12 effects), media (13 causes, 3 effects), and academia (8 causes, 8 effects) produced the more substantive outputs than the public (4 causes) and the government (5 causes). Thus, it is the think tank community that seems to outperform the other actors both in terms of causes and effects of economic diversification. Table 3 below summarizes these observations.

Table 3 The aggregate number of causes and effects of economic diversification

	Academia	Think tanks	Media	The public	Government
The number of causes	8	13	13	4	5
The number of effects	8	12	3	-	-

Note: Italicized and emboldened numbers denote the largest number of references.

Source: The author's own analytics

Second, with regards to the *types of diversification* node, the key actors produced the following major types of economic diversification as related to Kazakhstan: *product diversification*, i.e. emphasizing the need to pursue economic diversification based on expansion of manufactured products either within a single industry or across various sectors; *market diversification*, i.e. the need to expand the export geography for a single product or a set of products; *industry diversification*, i.e. focusing on developing new industries especially in the context of oil- and gas-rich nations; *diversification of single-industry towns* (also known as mono-towns) either by expanding the range of products within a given industry or developing new industries in a town. Furthermore, driven by the continuing dependence of Kazakh economy on energy resources to sustain growth, the *energy diversification* node is also included into analysis. This node is further broken down into two sub-nodes – *diversification within the energy sector* (such as oil and gas, mining, uranium and atomic industries) and *transition to green energy* including renewables and energy of the future.

As Table 4 suggests, regarding the *product diversification* node, academia produces the largest magnitude as measured in terms of the number of references (13),

closely followed by Kazakh government (12) and media (11). On the contrary, the public appears dormant in this regard, while think tanks produce a moderate degree of impact. The *market diversification* node, unlike the previous node, exhibits a more unambiguous picture – i.e. media outperforms the rest with 30 documented references. Regarding *industrial diversification*, media again produces the largest magnitude (17), closely followed by the government (15). As for the *energy diversification* node it is the government that largely outperforms the other actors, with 20 references and further 11 references related to the “*within the energy sector*” sub-node. Although media (10) slightly outperforms the government (9) in terms of the number of references related to the “*transition to green energy*” sub-node, the difference is negligible. Finally, regarding the “*single industry towns*” node, neither actor seems to outperform the rest, with the government and think tanks marginally producing a larger degree of impact.

To summarize this section, media largely remains the most dominant actor exhibiting larger magnitude with regard to market and industrial types and the “*transition to green energy*” sub-node. This is followed by the government exhibiting the largest magnitude related to the *energy diversification*, including the “*within the energy sector*” sub-node. Finally, academia seems to outperform the rest with regard to the *product diversification* category. It is also worth noting that none of the key actors seems to emphasize the importance of promoting diversification policies related to single industry towns. This is not to suggest diminished importance of developing single-industry towns based on diversification policy but rather compared to the other types of economic diversification single-industry town diversification is relatively a lower item on agenda among the key actors analyzed.

Table 4 Types of diversification, as defined by actors

Types of diversification	The number of references by each of the key actors				
	Academia	Think tanks	Media	The public	Government
Product	13	8	11	-	12
Market	11	19	30	4	15
Industrial	8	6	17	3	15
Energy (green; within the energy sector)	10 (5; 5)	10 (7; 3)	17 (10 ; 7)	-	20 (9; 11)
Single industry towns	1	2	1	-	2

Note: Italicized and emboldened numbers denote the larger numbers of references.

Source: The author's own analytics

Third, regarding *key industries* as defined by each of the actors, Table 5 (below) is helpful. It is worth noting that although the range of industries is quite wide (see Appendix 2), the analysis here focuses on more substantive industries, i.e. those generating at least 5 references by each actor. Furthermore, the industries selected for analysis must not be unique, i.e. defined by a single actor only (e.g. services as defined by the government, Appendix 2e) to ensure adequate comparability.

Table 5 Key industries as defined by actors

Industry	The number of references by each of the key actors			
	Academia	Think tanks	Media	Government
Agriculture	7	10	15	24

Chemical	-	-	8	9
Construction	6	-	8	7
Food	5	-	-	8
ICT & digital technologies	-	-	7	9
Engineering & machinery	5	-	13	9
Mining	11	9	13	15
Processing	6	6	10	18
Tourism	7	-	-	11
Transport	9	15	26	15

Note: a) Italicized and emboldened numbers denote the largest number of references.

b) The public produced negligible numbers of references, i.e. fewer than 5, and thus is omitted.

Source: The author's own analytics

As Table 5 suggests, the government produced the largest magnitude in terms of the number of references for the selected industries (7 industries), followed by media (3 industries). The public, on the contrary, did not seem to produce any meaningful impact in terms of defining key industries. Both the think tank community and academia, though exhibiting certain influence (i.e. think tanks related to agriculture and transportation industries and academia related to the mining and exploration industry) fall short of producing the magnitude enough to qualify these two actors as agenda-setters. It is thus the Kazakh government that seems to lead the pack in this regard.

Lastly, with regard to “*key actors*”, i.e. those deemed to play a role in shaping the agenda on economic diversification as identified by each of the actors (Appendix 2), the

public seems to emphasize the role of media (2 references), while media tends to refer to the Kazakh government (20) and to a lesser degree international organizations (9), followed by academia (5 media references). Academia emphasizes the predominant role of Kazakh government (16), followed by their fellows i.e. academia (9 references). The think tank community largely refers to Kazakh government (10 references), followed by international organizations (4) and foreign think tanks (3). Finally, the government emphasizes the importance of supporting small and medium business, i.e. the private sector (with 8 documented references), in setting the agenda for economic diversification policy, followed by international organizations (4). It is thus the Kazakh government that outperforms the other actors with regard to the “*key actors*” node.

4.3 An Analysis of the Public’s Comments

This sub-section analyses the public sentiments in relation to think tanks, media, and international organizations, as reflected in readers’ comments to some of the documented publications. First, while *think tanks* generally refer to the following negative causes that stifle economic diversification: a lack of political rivalry and openness, independent media and strong civil society, the *public* further emphasizes the following key factors: pervasive corruption and lack of strong civil society, i.e. “people are silent” (Stronski 2016). Thus while think tanks identified three distinct negative factors, the public did so with regard to two factors, including one in common, i.e. a lack of strong civil society and public activism. With regard to *transition to green economy*, think tanks note Kazakhstan’s leadership position among Central Asian states in promoting the *transition to green economy* onto political agenda through the adoption of the Green Economy Concept in 2013 with a focus on diversification based

on renewable energy sources and reforming agriculture and industrial sectors to spur research activity and the use of advanced technologies (Ospanova 2014). The public suggests taking a step further by amending legislation, e.g. the Ecological Code, to formally institutionalize emission trading and introduce a price on carbon emissions (ibid). In other words, while think tanks believe Kazakhstan has made certain progress in *transitioning to green energy*, the public deems this is not enough and that further steps are needed to bolster confidence in government measures as perceived by business and the wider public.

Second, in relation to media the public expresses two opposing views. On the one hand, the public appears to agree with some of media's arguments: in Tokabekova (2016), Kazakh national news portal Bnews.kz, referring to the success of key government policies such as the National Program on Investment Attractiveness (stage 1 for 2010-2014, stage 2 for 2015-2019), describes Kazakhstan as the most favourable and sustainable nation in Central Asia in terms of foreign investment attractiveness, while the public comments seem to be in line with this assessment. Furthermore, with regard to the opening of a new armoured vehicle manufacturing factory in Kazakhstan in 2015, the media cites Chairman of Paramount Group Ivor Ichikowitz, who positively assesses this move reflecting on Kazakh government's vision of diversified high-tech economy, and the public appears to agree based on readers' comments (DefenceWeb, 2015). On the other hand, the public may be found to be in disagreement with media's portrayal of certain issues. A Forbes.com media article cites a Lithuania-born adviser at Kazakh national wealth fund Samruk-Kazyna, who referred to the Kazakhstan-2050 strategy as the one that reforms state enterprises, diversifying the economy away from

mining, and building transportation infrastructure, and praised the 2014 “Nurly Zhol” government program to develop transportation infrastructure (Shepard 2016). The public’s reaction was rather negative, referring to the adviser’s narrative as the “Potemkin village for foreigners” (ibid), pinpointing his seeming lack of wealth fund management experience, especially in Kazakhstan. In another media article (Gorst 2012), state-run (oil and gas) KazMunaiGas Company is criticized for ineffective investments implemented in a number of oil projects while the government should have invested into diversifying the economy instead of subsidizing KazMunaiGas. The public sentiment suggests, however, that media should take a longer term perspective; furthermore, investing in oil projects (such as Kashagan) appears to be a more secure and profitable move “than any diversification project” (ibid).

Third, regarding international organizations, the public expresses negative sentiments. First, in response to a media publication, which stated that according to Moody’s analyses Kazakh economy still failed to diversify (as in Nur.kz 2015), readers reacted negatively by reminding about Moody’s failure to predict the financial crises in the US to begin with, not to mention its attempt to assess the vibrancy of Kazakh economy (ibid). Another media piece (Blua 2011) cites a new OECD report which urged Central Asian states to diversify their economies to attract foreign investments, while one of the readers reacted by pointing to OECD’s limited knowledge of the region: “As usual with OECD, the report is relevant mainly for energy-exporting states of Central Asia. There is too little for Tajikistan and Kyrgyzstan to draw from this report” (ibid). The negative assessment of international organizations is also developed by academia. For instance, Pomfret (2014) in his assessment of Kazakhstan 2030 strategy notes that

major policy documents “have the personal imprint of the President Nazarbayev” (p.10), while the role of international organizations remains mixed. In particular, both “the World Bank and IMF have become more cautious about being identified as apostles of neo-liberalism, and the United Nations, Asian Development Bank and OECD all have different agencies... offering conflicting advice” (ibid.).

To conclude, the public seems generally supportive of the narrative developed by the think tank community, jointly building a constructive dialogue with regard to possible factors that drive the development of economic diversification policies in Kazakhstan. On the contrary, international organizations are generally perceived rather in negative terms by the public, i.e. lack of competence (Nur.kz 2015) and limited knowledge of the region (Blua 2011) as applied to economic diversification policy. Media seems to occupy the middle ground, with the public being in line with some of media narratives (e.g. Tokabekova 2016, and DefenceWeb, 2015), while being opposed to other media articles (Shepard 2016, and Gorst 2012).

V. Key Findings and Discussion

This research reveals a number of interesting findings. First, quantitative analysis suggests the presence of overall agenda-setting power driven by experts, which include think tank and academic communities. Indeed, their attention to the issue precedes the attention of both non-experts – i.e. media and the public – and the government. Furthermore, as the experts continue to exhibit growing attention dynamics to the economic diversification issue in 2015-2016 and assuming that their agenda-setting power remains valid in another few years, non-experts should be expected to further increase their attention trends vis-à-vis their 2015-2016 levels, while the government is

expected to resume its activity in terms introducing more bills and other legislative documents and programs with regard to economic diversification, intensify discussions on parliamentary sessions etc. within the next few years (as Figure 3, p.14, suggests, there should be a 2-year gap between a spike in experts' attention and a correlated spike in government's attention to the issue, though this is a tentative finding). Among experts, think tanks are found to precede academia in terms of attention to the issue.

Interestingly, the role of the (online) public is found to be dormant. Having assessed two initially plausible explanations – lack of netizens' interest to the issue versus the inability of online research methods to capture parts of public sentiments – the former appears more plausible than the latter (see pp.15-16 for details). If this tentative finding is confirmed by further studies, it should have important methodological implications in support of the overall validity of online research methods even when internet penetration rates remain lower, i.e. around 25-40% (as in Dyussenov 2017). In other words, as long as an issue is interesting to online public enough to spur debates, public sentiments might intensify even with *lower* internet penetration rates.

Next, (NVivo-based) content analysis further points to a number of findings. With regard to *causes and effects*, think tanks appear to outperform the rest of actors by producing the largest magnitude in terms of the number of identified causes and effects related to economic diversification. On the other hand, media is found to lead the pack related to the *types of diversification* node by showing the largest relative magnitude among other actors. Regarding *key industries*, the Kazakh government produces the largest impact by defining 7 industries (out of 10 substantive industrial sectors) where diversification policy should be pursued. Finally, with regard to the *key actors* node,

each of the analyzed actors emphasizes the predominant significance, i.e. agenda-setting magnitude, of the government.

To conclude, quantitative analyses suggest the dominant agenda-setting role of the think tank community in driving economic diversification policy as contrasted with other actors. Qualitative (content) analyses exhibit a more complex picture. Think tanks again outperform the rest in relation to *causes and effects*, while the government is found to be the leading actor with regard to *key industries* and *key actors* nodes. Finally, media demonstrates the largest magnitude with regard to *types of diversification*.

VI. Conclusion and Further Research

Apart from contributing to the emerging agenda-setting scholarly literature related to the context of Kazakhstan, the paper concludes that a) think tanks set government agenda for economic diversification policy; b) the government, while producing the largest agenda-setting magnitude vis-à-vis the other actors, shapes the subsequent debates as measured by the number of relevant references in media, think tank, and academic publications. On the contrary, media only partially shapes the agenda with regard to the types of economic diversification as identified by the actors.

This research raises important policy and research implications. With regards to key policy experts and government decision makers, the findings of this research suggest the importance of taking into account the messages developed by local think tank communities in the context of economic diversification in Kazakhstan. By doing this, the government should be better equipped with making more efficient policy decisions. On the contrary, the role of international organizations and advisors is often weaker, as demonstrated in sections 4.2 and 4.3. Regarding research implications, these findings

prima facie appear to disprove the absolute validity of media-dominated agenda-setting theory (McCombs & Shaw 1972), at least as applied to economic diversification policies in Kazakh context. This research also partially refutes the existing literature, which suggests the predominant role of the government and President office in setting the agenda for various policy issues in Kazakhstan, by differentiating between actual agenda-setting in terms of temporal sequence of attention (with think tanks being the leading actor) and agenda-shaping magnitude (with the government being the more predominant actor, and think tanks and media being yet other important players).

There are certain areas for further research. First, scholars should further establish whether the “think tank – government” agenda-setting tandem plays out across other jurisdictions, primarily across former Soviet, as well as Eurasian and East European nations as applied to different policy issues. Alternatively, if other actors e.g. media, academia, or international organizations should be found to actually set the agenda, it is important to identify specific clusters of policy issues in the domain of a specific actor. Another area for further research is methodological. Contrasting with previous research as applied to corruption policy agenda-setting context in Thailand (Dyussenov 2017), this research tentatively finds the possible validity of using online research methods even with lower internet penetration levels (p.26). Thus, future studies should either support or disprove it.

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Appendices

Appendix 1 The List of Agenda-Setting Publications in Kazakhstan, 2011-2016

#	The title of publication	Author(s), year
1	Setting up the agenda for water reforms in Central Asia: Does the nexus approach help?	Abdullaev, I., & Rakhmatullaev, S. (2016)
2	Gender and nation in post-Soviet Central Asia: From national narratives to women's practices.	Cleuziou, J., & Dierenberger, L. (2016)
3	Cognitive potential of framing in setting agenda	Ibrayeva G. (2015)
4	Framing the diplomatic ties between Kazakhstan and Malaysia.	Akhmet, R. T., Khiang, C. C., & Kee, C. P. (2015)
5	State-society relations: NGOs in Kazakhstan.	Knox, C., & Yessimova, S. (2015)
6	Central Asian involvement in the conflict in Syria and Iraq: Drivers and responses	Tucker, N. (2015)
7	CSR reporting, corporate accountability to community stakeholders and its role in shaping CSR incentive system in Kazakhstan	Novikova, Y. (2015)
8	Anticorruption policy in Canada and Kazakhstan: bottom-up vs. top-down agenda setting	Mukhtarova, A., Mammadli, E., & Ilko, I. (2013)
9	Bordering on the modern: power, practice and exclusion in Astana.	Koch, N. (2013)
10	HR holds back economic development in Kazakhstan: ... and may thwart ambitions to be a top 50 nation by 2020.	Davis, P. J. (2012)
11	Have your cake and eat it too: agenda-setting in Central Asian transboundary rivers	Wegerich, K. (2010)
12	The soft authoritarian tool kit: Agenda-setting power in Kazakhstan and Kyrgyzstan.	Schatz, E. (2009)
13	Transnational image making and soft authoritarian Kazakhstan.	Schatz, E. (2008)
14	Conceptualising state capacity: Comparing Kazakhstan and Kyrgyzstan.	Cummings, S. N., & Nørgaard, O. (2004)
15	Emerging regions, persisting rhetoric of educational aid: The impact of the Asian Development Bank on educational policy making in Kazakhstan	Asanova, J. (2006)
16	Setting the agenda in the Caspian basin: The political economy of Russia's energy leverage.	Stulberg, A. N. (2003)

Appendix 2 Nodes as defined by NVivo content analysis

a. The Public

Causes and effects	0	0
Effects	0	0
Causes	0	0
Positive	0	0
Eurasian cooperation	1	1
Cross-border investment	1	1
Negative	0	0
Mismanagement	1	1
Corruption	1	1
Types of diversification	0	0
Market (export & trade) diversification	1	4
Industrial diversification	1	3
Key industries defined	0	0
Transportation & cargos	1	1
Processing	1	1
Mining (e.g. oil & gas)	1	2
Defence	1	1
Car manufacturing	1	1
Agriculture	1	2
Key actors	0	0
Media	1	2

b. Media

<input type="radio"/>	Causes and effects	0	0
<input type="radio"/>	Effects (what diversification leads to)	1	2
<input type="radio"/>	Causes (what impacts diversification)	1	12
<input type="radio"/>	Types of diversification	0	0
<input type="radio"/>	Product diversification	1	11
<input type="radio"/>	Market (exports, trade) diversification	1	30
<input type="radio"/>	Industry diversification	1	17
<input type="radio"/>	Energy diversification	0	0
<input type="radio"/>	Transition to green energy	1	10
<input type="radio"/>	Diversification within the energy (oil & gas, mining)	1	7
<input type="radio"/>	Diversifying single-industry towns	1	1
<input type="radio"/>	Key industries defined	0	0
<input type="radio"/>	Transportation & logistics	1	26
<input type="radio"/>	Tourism	1	4
<input type="radio"/>	Processing	1	10
<input type="radio"/>	Mining & extraction	1	13
<input type="radio"/>	Medical products	1	2
<input type="radio"/>	Machines and engineering	1	13
<input type="radio"/>	IT & telecommunications	1	7
<input type="radio"/>	Food production	1	2
<input type="radio"/>	Finance	1	5
<input type="radio"/>	Construction	1	7
<input type="radio"/>	Hotels, real estate	1	1
<input type="radio"/>	Chemical	1	8
<input type="radio"/>	Agriculture	1	15
<input type="radio"/>	Key actors found to shape the agenda	0	0
<input type="radio"/>	Think tanks	0	0
<input type="radio"/>	Local	1	1
<input type="radio"/>	Foreign	1	4
<input type="radio"/>	Private sector (local)	1	2
<input type="radio"/>	Private sector (foreign)	1	3
<input type="radio"/>	Media	0	0
<input type="radio"/>	International organizations	1	9
<input type="radio"/>	Government	0	0
<input type="radio"/>	Local	1	20
<input type="radio"/>	Foreign	1	2
<input type="radio"/>	Academia	1	5

c. Academia

<input type="radio"/>	Causes and effects	0	0
<input type="radio"/>	Effects	5	7
<input type="radio"/>	Causes	7	12
<input type="radio"/>	Types of diversification	0	0
<input type="radio"/>	Product	8	13
<input type="radio"/>	Market (trade, export)	9	11
<input type="radio"/>	Industrial	6	8
<input type="checkbox"/>	Energy	0	0
<input type="radio"/>	Transition to green energy	5	5
<input type="radio"/>	Diversification within the energy sector	5	5
<input type="radio"/>	Diversifying single-industry towns	1	1
<input type="radio"/>	Key industries	0	0
<input type="radio"/>	Transportation (railways, pipelines etc.)	6	9
<input type="radio"/>	Tourism & hotels	6	7
<input type="radio"/>	Textile	3	3
<input type="radio"/>	Services	2	2
<input type="radio"/>	Processing	5	6
<input type="radio"/>	Mining	8	11
<input type="radio"/>	Manufacturing	2	2
<input type="radio"/>	Food	4	5
<input type="radio"/>	Engineering and machine-building	5	5
<input type="radio"/>	Construction	5	6
<input type="radio"/>	Agriculture	5	7
<input type="radio"/>	Key actors	0	0
<input type="radio"/>	Think tanks	1	1
<input type="radio"/>	Small and medium business	1	1
<input type="radio"/>	Media	0	0
<input type="radio"/>	International organizations	2	2
<input type="checkbox"/>	Government	0	0
<input type="radio"/>	Local	9	16
<input type="radio"/>	Academia	5	9

d. Think tanks

<input checked="" type="radio"/> Causes and effects		0	0
<input checked="" type="radio"/> Effects		0	0
<input checked="" type="radio"/> Positive		1	10
<input checked="" type="radio"/> Negative		1	2
<input checked="" type="radio"/> Causes		0	0
<input checked="" type="radio"/> Positive		1	11
<input checked="" type="radio"/> Negative (constraints)		1	2

Key actors found to shape the agenda

Name	Sources	References
<input checked="" type="radio"/> Think tanks	0	0
<input checked="" type="radio"/> Local	0	0
<input checked="" type="radio"/> Foreign	1	3
<input checked="" type="radio"/> Media	1	2
<input checked="" type="radio"/> International organizations	1	4
<input checked="" type="radio"/> Government	0	0
<input checked="" type="radio"/> Local	1	10
<input checked="" type="radio"/> Foreign	0	0
<input checked="" type="radio"/> Academia	1	1

Types of diversification

Name	Sources	References
<input checked="" type="radio"/> Product diversification	1	8
<input checked="" type="radio"/> Market (trade & export) diversification	1	19
<input checked="" type="radio"/> Industry diversification	1	6
<input checked="" type="radio"/> Energy diversification	0	0
<input checked="" type="radio"/> Transition to green energy	1	7
<input checked="" type="radio"/> Diversification within the energy (e.g. oil & gas) sector	1	3
<input checked="" type="radio"/> Diversifying single-industry towns	1	2

Key industries defined

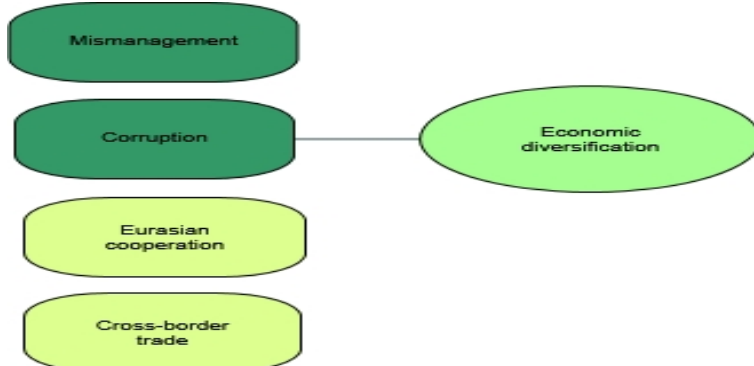
Name	Sources	References
<input checked="" type="radio"/> Transportation & logistics	1	14
<input checked="" type="radio"/> Railways, locomotives, railcars	0	0
<input checked="" type="radio"/> Aviation	1	1
<input checked="" type="radio"/> Tourism	1	4
<input checked="" type="radio"/> Processing	1	6
<input checked="" type="radio"/> Mining & extraction	1	9
<input checked="" type="radio"/> Machines & engineering	1	2
<input checked="" type="radio"/> Food production	1	2
<input checked="" type="radio"/> Finance	1	2
<input checked="" type="radio"/> Construction	1	2
<input checked="" type="radio"/> Chemical	1	1
<input checked="" type="radio"/> Agriculture	1	10

e. Government

<input type="radio"/>	Causes and effects		0	0
<input type="radio"/>	Causes (what impacts diversification)		2	3
<input type="radio"/>	Effects (what diversification leads to)		0	0
<input type="radio"/>	Industries defined		0	0
<input type="radio"/>	Agriculture		2	24
<input type="radio"/>	Processing		2	18
<input type="radio"/>	Mining & extraction (e.g. oil & gas, metallurgy)		2	15
<input type="radio"/>	Transportation & logistics		2	15
<input type="radio"/>	Tourism		2	11
<input type="radio"/>	Services		2	10
<input type="radio"/>	Machines & engineering		2	9
<input type="radio"/>	Chemical		2	9
<input type="radio"/>	ICT & digital technologies		2	9
<input type="radio"/>	Food production		2	8
<input type="radio"/>	Construction		2	7
<input type="radio"/>	Textile		1	4
<input type="radio"/>	Finance		1	3
<input type="radio"/>	Defence		1	2
<input type="radio"/>	Types of diversification		0	0
<input type="radio"/>	Industry diversification		2	15
<input type="radio"/>	Market (exports & trade) diversification		2	15
<input type="radio"/>	Product diversification		2	12
<input type="radio"/>	Diversifying single-industry towns		2	2
<input type="checkbox"/>	Energy diversification		0	0
<input type="radio"/>	Diversification within the energy sector (e.g. oil & gas, uranium, power etc.)		2	11
<input type="radio"/>	Green energy (renewables, wind, solar)		2	9
<input type="radio"/>	Key actors		0	0
<input type="radio"/>	The private sector (small and medium business)		1	8
<input type="radio"/>	International organizations		1	4
<input type="radio"/>	Think tanks		1	1

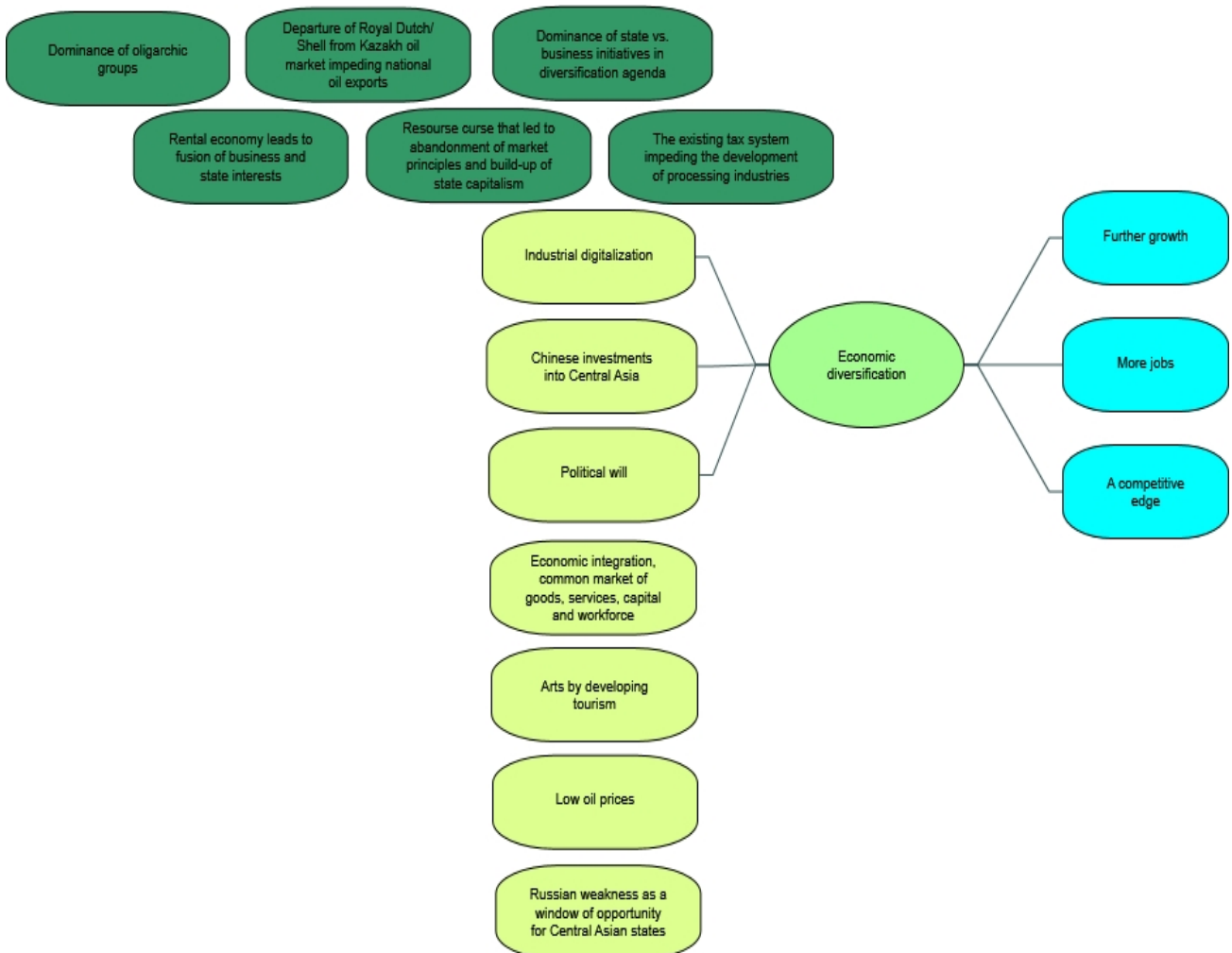
Appendix 3 Causes and effects, as defined by key actors

a. The Public



Note: The public defined causes only. Dark green denotes negatively correlated causes, i.e. mismanagement should lead to weaker economic diversification.

b. Media



Note: Media defined 13 distinct causes (including 6 negatively correlated, as denoted by dark green) and 3 effects of economic diversification (all positive).

c. Academia



Note: a) Academia defined the total of 8 distinct causes (2 negative and 6 positive) and 8 distinct effects (3 negative and 5 positive) of economic diversification in the context of Kazakhstan.

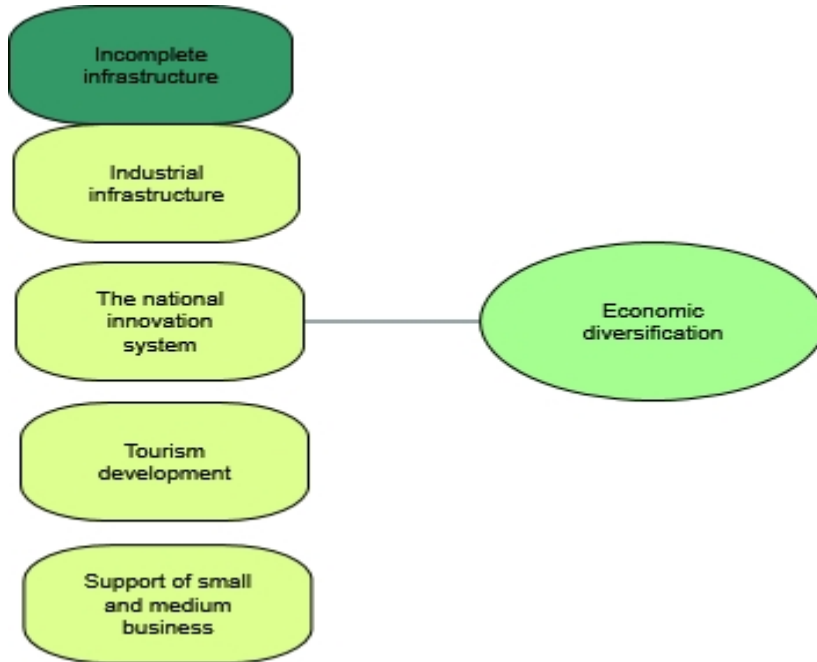
b) Red denotes a hypothesized cause (i.e. foreign direct investments) that was tested in a research publication and found not to be an important factor explaining the development of economic diversification.

d. Think tanks



Notes: a) The think tank community produced 13 distinct causes of economic diversification. These include 11 positively correlated causes (light green) and 2 negatively correlated (dark green) causes. b) Think tanks defined 12 distinct effects of economic diversification, including 10 positive (blue) and 2 negative (navy blue) effects.

e. Government



Note: Similarly to the public (Appendix 3a), the government of Kazakhstan defined causes only. Dark green denotes a negatively correlated cause of economic diversification, i.e. incomplete infrastructure.