



Kazakh Cinema at a Crossroads: Institutional Continuities, Market Forces, and Creative Dynamics (1991–2024)

Master's Thesis in Global Markets, Local Creativities

Faculty: Erasmus School of History, Culture & Communication

Academic Year: 2024 – 2025



Alina Zafar

Student number: 743312az; 2902441z

e-mail: alina.azfr@gmail.com

Supervisor: Ben Wubs
Erasmus Universiteit Rotterdam

Second reader: Maria Esther Hormiga Perez
Universidad de Barcelona

Third reader: Jeffrey Fear
University of Glasgow

June 10, 2025

Abstract

This thesis examines how Kazakhstan's national film sector that once operated as a Soviet cultural arm has been remodelled for a market economy without abandoning its socialist scaffold. Filling a gap in the literature on post-socialist creative industries, the study asks: what continuities and discontinuities have shaped Kazakh cinema's institutional organisation between 1991 and 2024, and with what creative and economic effects? To answer this, the thesis triangulates three evidence streams: fifty-one policy documents and statutes mapping governance reform and an IMDb-derived panel of all feature-length Kazakh releases since independence, analysed with bipartite social-network methods to track 2,470 director–writer collaborations. Combining qualitative policy analysis with empirical network metrics allows the project to capture both formal rule change and informal creative practice.

Findings reveal alignment with institutional path plasticity, suggesting an incremental adaptation rather than rupture. Core Soviet bodies were seldom abolished. Instead, policy-makers layered new instruments such as cash-rebate schemes and digital tools onto existing hierarchies or tried to convert legacy entities like Kazakhfilm into hybrid public-private actors. Parallel industrial shifts evidence a pluralisation of production. Studios such as Satafilm, Nurtas Production and Qara Studios normalised profitability, while web-native companies (Salem Entertainment) and OTT newcomers (Uni-Q/Unico Play) redirected finance and audience attention towards genre cinema and Kazakh-language streaming originals. Policy has tacitly endorsed this pivot through incentives like the Digital Content Rebate, signalling a new contest over narrative sovereignty in the platform era. Network analysis shows that the director–writer field evolved from a fragile, Kazakhfilm-centred hub in the 1990s to a segmented, polycentric web after 2014, in which generational clusters orbit loose-coupled brokers rather than a single state anchor. Yet veteran auteurs preserve status and influence, acting as a bridge between public subsidy and private capital. It confirms that institutional hierarchies still shape cultural industries.

The thesis argues that this hybrid architecture, simultaneously market-responsive and statist, explains both the resilience of Kazakh cinema and its persistent stratification. Conceptually, it extends path-plasticity theory to cultural industries and offers a mixed-methods template for examining post-Soviet creative economies. Practically, it highlights how incremental rule change, rather than wholesale privatisation, can stimulate output while preserving symbolic assets, a lesson for other small-market cinemas navigating global platform pressures.

Keywords: Kazakh cinema, Path plasticity, Post-Soviet culture, Creative economy, Film policy, National identity

Table of Contents

Abstract.....	2
List of Abbreviations	5
Chapter 1. Introduction.....	6
1.1 Problem statement.....	6
1.2 Research questions	7
1.3 Research design	8
1.3.1 Sources	8
1.3.2 Source criticism	9
1.3.3 Methods	9
1.4 Significance of the study.....	10
1.5 Thesis structure	11
Chapter 2. Situating Kazakh Cinema	13
2.1 State of the literature	13
2.2 Emergence of the national cinema?	14
2.3 Waves in Kazakh filmmaking	15
2.4 Nation-building and cultural revival	16
2.5 Challenges of contemporary cinema.....	18
2.6 Thematic shifts.....	19
2.7 Theoretical framework.....	20
2.7.1 Path plasticity	20
2.7.2 Creative economy.....	22
2.8 Conclusion.....	23
Chapter 3. Soviet Legacies and Post-Soviet Realities	24
3.1 Applying path plasticity to the Kazakh context.....	24
3.2 The Soviet Governance Logic (1922 - 1991).....	25
3.2.1 Key takeaways	29
3.3 Post-Soviet Trajectories: Retention, Adaptation and Rejection (1991 – 2024).....	30
3.3.1 Discontinuities	30
3.3.2 Ministry.....	31
3.3.3 Kazakhfilm	32
3.3.4 State Centre for the Support of National Cinema (SCNSC).....	33
3.4 Conclusion.....	35
Chapter 4. New Actors, New Frameworks.....	37
4.1 Adapting to market logic	37
4.2 Rise of private production	39
4.3 Creativity outstretched	44
4.4 Co-productions and distribution	45
4.4.1 A hard-to-break dependency	45

4.4.2 Glocalisation turn	46
4.5 Digital sovereignty	47
4.6 Conclusion.....	49
Chapter 5. Collaborative Networks	51
5.1 Applying social network analysis	51
5.2 Social network evolution	52
5.2.1 Expansion, densification, and path contraction	52
5.2.2 Shifting brokerage power and the auteur paradox.....	54
5.2.3 Quantitative metric shifts	56
5.3 Community detection	57
5.3.1 Retention in early independence	58
5.3.2 Layering of the state-led boom.....	60
5.3.3 Conversion and diversification.....	63
5.4 Conclusion.....	67
Chapter 6. Conclusion	70
References	74
List of Primary Sources	80

List of Abbreviations

EAIS – Unified Automated Information System (Kazakhstan’s digital film ticketing portal)

Goskino USSR – State Committee for Cinematography of the USSR

GURK – Main Directorate for the Control of Spectacles and Repertoire

IMDB – Internet Movie Database

Kazkinoprokat – Kazakh State Film Distribution Agency

Narkompros – People’s Commissariat of Education

OTT – Over-the-Top (internet-based media distribution)

Perestroika – Policy of political and economic reform in the late USSR

RSFSR – Russian Soviet Federative Socialist Republic

SCNSC – State Centre for the Support of National Cinema

Soiuzkinoprokat – All-Union Film Distribution Office

SVOD – Subscription Video on Demand

TSOKS – Central United Film Studio

UNESCO – United Nations Educational, Scientific and Cultural Organisation

USSR – Union of Soviet Socialist Republics

VGIK – All-Russian State Institute of Cinematography (Vserossiiskiy gosudarstvennyi institut kinematografii)

Kazakh Cinema at a Crossroads: Institutional Continuities, Market Forces, and Creative Dynamics (1991–2024)

Chapter 1. Introduction

1.1 Problem statement

Kazakh cinema today embodies a fascinating paradox: a film industry shaped by Soviet-era institutions yet increasingly influenced by market forces. Following the dissolution of the Soviet Union in 1991, Kazakhstan's film industry faced an institutional vacuum, marked by the collapse of centralised state funding and production mechanisms.¹ This prompted profound transformations as the industry navigated economic uncertainty and cultural fragmentation. In a globalised world, it is crucial to understand how national cinemas like Kazakhstan adapt to market forces while preserving their unique cultural identities.² The pressures of international markets can often lead to homogenisation, making the specific obstacles and strategies of Kazakh cinema in maintaining its distinctiveness particularly relevant.³ The dominance of foreign films in the Kazakhstani market in 2008, with domestic productions comprising a mere 10% of all screenings (including festivals) and a scant 1% of commercial releases, highlights the struggles of Kazakh filmmakers to compete with global cinema.⁴ However, as of 2025, the issue of cultural discount associated with the audience's neglect of locally produced content seems to be gone, with domestic production dominating box offices.⁵ These full-scale changes, nearly two decades after independence, reveal deep structural issues within the industry, far beyond transitional growing pains. The point is underscored by 2024 data, which excoriated the State Centre for Support of National Cinema

¹ Paul Gregory Hare and Gerard Turley, eds., 'Institutions in Transition', in *Handbook of the Economics and Political Economy of Transition*, Routledge International Handbooks (Abingdon, Oxon: Routledge, 2013), 36, <https://doi.org/10.4324/9780203067901>.

² James Tweedie, 'Introduction: Youth, Cities, and the Globalization of Art Cinema', in *The Age of New Waves: Art Cinema and the Staging of Globalization* (Oxford University Press, 2013), 9, <https://doi.org/10.1093/acprof:oso/9780199858286.001.0001>.

³ Ian Christie, 'Where Is National Cinema Today (and Do We Still Need It)?', *Film History* 25, no. 1–2 (2013): 19–20, <https://doi.org/10.2979/filmhistory.25.1-2.19>.

⁴ Birgit Beumers, 'Waves, Old and New, in Kazakh Cinema', *Studies in Russian and Soviet Cinema* 4, no. 2 (July 2010): 205, <https://doi.org/10.1386/srsc.4.2.203>.

⁵ Nagima Abuova, 'Kazakhstan's Film Industry: Domestic Productions Dominate Box Office', *The Astana Times*, 22 March 2025, <https://astanatimes.com/2025/03/kazakhstans-film-industry-domestic-productions-dominate-box-office/>.

for disbursing ₸19 billion (ca. \$42 million) to 103 projects over five years, of which only 23 reached distribution and collectively grossed just ₸1.5 billion (ca. \$3.3 million).⁶

However, despite the evident tensions within Kazakh cinema between these inherited Soviet structures and emerging market dynamics, a systematic analysis of their interplay and economic impact is currently absent in the existing literature. Moreover, up to now, far too little attention has been paid to the industry's development from 2010 onwards, despite its significant progress. For example, structural shifts, such as a 30% cash rebate policy to foster international co-productions and a growing domestic market fuelled by Kazakh-language commercial hits.⁷ Thus, the proposed study employs a convergent parallel mixed-methods design. Through qualitative discourse analysis of policy documents, it uncovers institutional priorities and thematic objectives, while social network analysis evaluates the alignment of these priorities with the patterns evident in Kazakh cinema from 1991 to 2024.

1.2 Research questions

To understand the complex interplay of institutional legacies, market forces, and policy shifts that have shaped Kazakh cinema, the research poses the following main question: What are the continuities and discontinuities in Kazakh cinema's institutional evolution between 1991 and 2024? To answer this central question, the study investigates the following interconnected aspects:

1. Which Soviet-era institutional structures and practices has post-Soviet Kazakh cinema retained, adapted, or rejected?

This question delves into the enduring influence of the Soviet legacy on Kazakh cinema. Specifically, it examines how key institutions, like Kazakhfilm (the state-run studio of the Soviet era), production practices, funding models, and censorship were carried over, modified, or discarded in the post-Soviet period.

2. What new institutional actors and frameworks emerged in Kazakh cinema after 1991, and how did they interact with inherited Soviet-era institutions?

⁶ Igor Ulitin, '[Kazakhfilm but not only: who received billions of tenge for failed film projects]. «Казакхфильм» и не только: кто получил миллиарды тенге на провальные кинопроекты', ORDA.kz, 23 February 2024, <https://orda.kz/kazakhfilm-i-ne-tolko-kto-poluchil-milliardy-tenge-na-provalnye-kinoproekty-382942/>.

⁷ Christopher Vourlias, 'Out of Russia's Shadow, Kazakh Cinema Finds a Fresh Voice in Generation of Bold, Emerging Talents', *Variety*, 11 December 2023, <https://variety.com/2023/film/global/kazakhstan-emerging-filmmakers-russia-1235832399/>.

This question explores the emergence of new forces in the Kazakh film industry following independence. It investigates private production companies, international funding sources, and new distribution channels. Furthermore, it examines how these new actors and frameworks interacted with, challenged, or complemented the existing Soviet-era institutions. For instance, did private companies collaborate with or compete against Kazakhfilm? How did international co-productions navigate the existing regulatory framework? Did new distribution models bypass or integrate with traditional channels?

3. How have the collaborative networks evolved since 1991, and how do these relational structures reflect the institutional dynamics in Kazakh cinema's creative ecosystem?

This question moves the analysis from the macro-level of institutions to the meso-level of creative practice. By mapping the collaborative ties between directors and writers over decades, the study examines how the relational fabric of the industry has changed. It assesses how shifts in network density, brokerage patterns, and creative clusters mirror the institutional transformations.

1.3 Research design

1.3.1 Sources

This study draws on a combination of primary sources, selected purposively to investigate the evolution of Kazakh cinema's institutional framework from 1991 to 2024. A total of 51 official policy documents from the Legal Information System of Regulatory Legal Acts of the Republic of Kazakhstan (adilet.zan.kz) were analysed. Particularly, 12 from the Soviet period and 39 from the post-independence era (see Appendix). Soviet-era sources provide insights into the centralised control and ideological priorities of cinema during the USSR era. Post-independence documents, such as the 2019 Cinema Law and Cultural Policy Concepts, outline decentralisation, privatisation, and the modernisation of cinema as a cultural and economic industry. However, selecting Soviet-era documents implies challenges. While contemporary policy documents are readily accessible online and often available in English, Soviet materials required extensive archival research to identify the most relevant texts. Moreover, the fragmented nature of Soviet archives and the lack of digitised records may have created research gaps. The issue was addressed by triangulating with secondary sources and independent analyses. Additional sources of data are databases such as IMDb (mainly), Kinopoisk, and IMDb Pro. They were used to gather metadata on released movies:

date, director, screenwriters, genre, box office performance, website rating, production studio, and international awards.

1.3.2 Source criticism

To ensure reliability and academic rigour, all sources are critically evaluated for their ideological biases, scope, and historical context. Soviet-era documents, for instance, reflect a strong ideological agenda prioritising state control and propagandistic objectives over artistic independence. The dominance of Goskino and the promotion of socialist realism necessitate scrutiny to distinguish between genuine cultural practices and politically motivated narratives. Conversely, post-independence documents, while often more transparent and geared towards fostering international collaboration, may reflect nationalist and economic priorities tied to Kazakhstan's broader state-building agenda.

Language and translation issues may also affect interpretation, particularly when dealing with Soviet terminologies or culturally specific idioms in modern Kazakh policy. Moreover, certain post-independence materials developed in collaboration with international organisations might carry external influences or priorities that do not fully align with domestic realities. To mitigate these risks, findings are cross-referenced with independent reports, industry data, and scholarly literature. This triangulated approach ensures that all sources contribute meaningfully to tracing the institutional evolution of Kazakh cinema while maintaining analytical objectivity.

1.3.3 Methods

This research employs a mixed-methods approach by integrating policy document and network analyses to address the overarching research question on continuities and discontinuities in post-independence Kazakh cinema's institutional evolution. This approach is designed to systematically examine the institutional frameworks, governance practices, and thematic trends in Kazakh cinema. It provides a lens to evaluate the interplay between Soviet legacies and market-economy transformations.

The policy document analysis addresses the research subquestions concerning the retention, adaptation, or rejection of Soviet-era structures and the emergence of new institutional actors. Documents are thematically coded in NVivo. Themes are informed by the literature review. Key themes include centralisation vs. decentralisation, nationalism and

cultural identity, and economic governance models. This coding structure enables a detailed comparison between the ideological and structural priorities of the Soviet and post-independence eras. For example, the analysis examines whether post-independence policies succeeded in shifting away from Soviet models or perpetuated them under new guises.

The network analysis focuses on the sub-question concerning collaborative patterns. It examines trends in cinematic outputs during the post-independence period, offering a bottom-up perspective that complements the top-down insights from the content analysis. The dataset is divided into three temporal slices (1992-2002, 2003-2013, and 2014-2024). In total, Kazakh cinematography has released 638 full-length films: 87, 227, and 324, in each period, respectively. The network consists of nodes, representing directors and screenwriters, and edges, signifying the connections between two categories. Metrics such as clustering coefficients and centrality measures are calculated and visualised in R Studio. This analysis identifies thematic clusters and highlights influential directors, offering insights into the dominant narratives and creative dynamics of Kazakh cinema.

The biggest methodological challenge was integrating findings from the policy and network analyses. The study aims to evaluate the effectiveness of post-independence policies by comparing them to trends in cinematic outputs, complicated by differences in data granularity and scope. Ensuring that the two methods complement rather than contradict each other requires iterative refinements and careful interpretation. Another possible limitation is the inherently interpretive nature of the thematic coding in content analysis. Establishing clear and consistent coding criteria in the literature review stage was a crucial step in overcoming potential bias later on.

1.4 Significance of the study

This research contributes to academic debates on post-Soviet cultural transitions and creative economies through its unique approach to studying Kazakh cinema. Firstly, it advances the discussion on the legacy of Soviet institutions by applying the concept of Path Plasticity. Unlike traditional Path Dependency models that often portray post-socialist states as rigidly bound by their past, this framework emphasises the adaptive capacity of Kazakh cinema to integrate Soviet-era structures with new, market-oriented practices. This perspective provides a more dynamic understanding of institutional change, demonstrating how historical legacies can be repurposed rather than discarded. For instance, the study

examines how elements of the Soviet system, such as the established studio Kazakhfilm, have interacted with emerging private production companies, showcasing the layering and conversion processes that contribute to the industry's evolution. This analysis offers new insights into the adaptability of cultural industries in transitional contexts.

Secondly, the research introduces methodological innovation by combining policy documents and bipartite network analyses. This mixed-methods approach bridges a notable gap in current scholarship, which often examines either the institutional or the creative aspects of cinema in isolation. Policy analysis provides a top-down perspective on institutional frameworks and priorities, while network analysis offers a bottom-up view of creative outputs. By systematically connecting stated policy objectives with the actual collaborative patterns, the study provides a more holistic and empirically grounded assessment of the Kazakh film industry. The use of bipartite network analysis is particularly novel in the context of post-Soviet cinema studies. It enables the visualisation of complex relationships between directors, themes, and institutional affiliations, revealing underlying structures and influential actors within the industry.

Lastly, the study enriches the discourse on creative economies by specifically examining the dual nature of Kazakh cinema as a cultural resource and an economic engine in a post-Soviet context. It addresses Kazakhstan's attempts to balance the promotion of national identity and economic growth objectives. By analysing the interplay between cultural policies and market forces, the research provides valuable insights into the challenges faced by emerging creative economies in maintaining cultural distinctiveness while striving for international recognition. This exploration contributes to a more nuanced understanding of the role of national cinemas in a globalised world, particularly in how they negotiate the tensions between preserving local cultural identity and responding to global market demands. The findings offer a valuable framework for understanding the complex dynamics of post-Soviet cultural transitions, with implications for both academic inquiry and cultural policymaking.

1.5 Thesis structure

This thesis is structured into six chapters, each addressing a key dimension of Kazakh cinema's institutional and creative evolution between 1991 and 2024. Chapter 1 introduces the central research problem, outlines the significance of the study, and presents the methodological approach, which combines policy analysis and bipartite network analysis to

capture both institutional logics and creative dynamics. Chapter 2 situates Kazakh cinema within broader scholarly debates, tracing historical waves of cinematic development and introducing the theoretical frameworks of path plasticity and the creative economy. Chapter 3 examines Soviet legacies and their transformation after independence, applying a structured coding framework to evaluate the retention, adaptation, or rejection of inherited institutions. Chapter 4 shifts focus to post-Soviet developments, exploring the rise of private studios, international co-productions, and new forms of distribution, with particular attention to the interaction between new and existing institutional actors. Chapter 5 presents a bipartite network analysis of director-writer collaborations across three key periods. Through visualisation and centrality metrics, it uncovers evolving patterns of authorship, clustering, and creative influence, offering empirical insight into how institutional shifts have shaped collaborative structures in Kazakh cinema. Chapter 6 concludes the thesis by synthesising the main findings, highlighting the mechanisms of institutional change, the diversification of creative agency, and the persistent role of the state. It also reflects on the theoretical contributions of the study, outlines its limitations, and suggests directions for future research on cultural industries in post-socialist contexts.

Chapter 2. Situating Kazakh Cinema

This chapter maps the intellectual landscape in which the current thesis is situated. Mainly, it explores how existing scholarship has explained the historical development, cultural functions, and institutional arrangements of Kazakh cinema, and where those explanations still fall short.

2.1 State of the literature

The academic literature on Kazakh cinema is scarce and marked by uneven focus, with significant attention to the Soviet era and comparatively less exploration of the post-independence period. Scholars generally agree that Soviet-era cinema served as a tool of ideological propaganda, tightly controlled by centralised institutions such as Goskino and Kazakhfilm Studios. However, post-independence studies increasingly focus on the role of cinema in nation-building, reflecting broader shifts in the region's cultural and political landscape.

A large and growing body of constructionist literature has investigated how cinematic narratives are embedded within the nation-building process. For instance, Olcott highlights the challenges of reinventing Kazakh national identity, erased in the Soviet period when the titular nationality was treated as a minority population.⁸ Consequently, Norris explores how Kazakhstan utilised its nomadic past to shape post-Soviet nationhood.⁹ It is in line with a broader regional study by Raudino; it explains the rise in interest by arguing that ethnic motives were barely seen in Soviet-era cinema due to the regime's push for a unified pro-Russian image, cancelling all deviating or peculiar elements.¹⁰ Developing the idea of the novelty of such a tool, Isaacs highlights the role of films in both state-led and grassroots identity formation.¹¹ Nation-building has become a central theme in post-Soviet cinema as the newly independent state gained more creative freedom of expression after the collapse of the Union.

⁸ Martha Brill Olcott, *Kazakhstan: Unfulfilled Promise* (Brookings Institution Press, 2010), 142, <https://doi.org/10.2307/j.ctt6wpkdj>.

⁹ Stephen M. Norris, 'Nomadic Nationhood: Cinema, Nationhood, and Remembrance in Post-Soviet Kazakhstan', *Ab Imperio* 2012, no. 2 (2012): 378–402, <https://doi.org/10.1353/imp.2012.0072>.

¹⁰ Giuseppe Raudino, 'Questions of Transnational Cinema: The Baltic Case from Culture to Branding', *The Romanian Journal for Baltic and Nordic Studies* 7, no. 2 (15 December 2015): 113, https://doi.org/10.53604/rjbns.v7i2_8.

¹¹ Rico Isaacs and Abel Polese, eds., *Nation Building and Identity in the Post-Soviet Space: New Tools and Approaches*, Post-Soviet Politics (London New York: Routledge, 2016), 152–53, <https://doi.org/10.4324/9781315597386>.

2.2 Emergence of the national cinema?

Academic explorations of Kazakh cinema often employ periodisation to chart its chronological development, reflecting shifting cultural, political, and aesthetic paradigms. Abikeyeva's foundational work traces the Soviet-era origins of Kazakh film (1930s-1950s), highlighting how propaganda-inflected productions sought both to unify Soviet identity and showcase local Kazakh traditions.¹² This early wave emphasised socialist realist narratives in service of the wider Soviet ideological project, with Almaty-based studios acting as regional outposts rather than fully autonomous creative hubs.

A subsequent period coincided with the post-Stalin "Thaw" of the 1960s through to the late Soviet era (1970s–1980s). Beumers identifies a gradual loosening of ideological constraints, enabling filmmakers to experiment with narrative complexity and localised thematic content while still operating within Soviet censorship structures.¹³ Karpovich similarly notes that this era encouraged Soviet directors to confront social issues more openly, although they remained subject to continuing oversight. Works from this period increasingly integrated Kazakh-language dialogue, traditional motifs, and locally resonant storytelling devices — a partial shift towards more genuine cultural representation.¹⁴ This take is supported by Isaacs, as he notes, particularly after the Stalin era, cinema became an effective tool for reinterpreting Kazakhstan's history and cultural heritage, marking a shift toward the visualisation of uniquely Kazakh themes.¹⁵ In the same vein, Abishev praises the efforts of famous directors such as Shaken Aimanov, Mazhit Begalin, Abdullah Karsakbaev, and Sultan Khodzhikov in covertly translating the epos of national heroes and nature, circumventing censorship that dictated exclusively communist values.¹⁶

However, the duality between state-led propaganda and grassroots reinterpretation, highlighting the complexity of nation-building within Kazakh cinema under Soviet rule, almost necessitated some degree of criticism for the period. Thus, Pruner notes the decline of

¹² Gulnara Abikeyeva, *The Heart of the World: Films from Central Asia* (Almaty: Complex, 2003), 35.

¹³ Beumers, 'Waves, Old and New, in Kazakh Cinema', 205.

¹⁴ Angelina Karpovich, '(In)Action Film: Genre and Identity in Rashid Nugmanov's *The Needle*', in *Genre in Asian Film and Television: New Approaches*, ed. Felicia Chan, Angelina Karpovich, and Xin Zhang (London: Palgrave Macmillan UK, 2011), 171, https://doi.org/10.1057/9780230301900_11.

¹⁵ Isaacs and Polese, *Nation Building and Identity in the Post-Soviet Space*, 139.

¹⁶ Serik Abishev, Evgenii Lumpov, and Inna Smailova, 'The Phenomenon of Partisan Cinema: Alternative Film Production in Kazakhstan (Appendix: A Manifesto)', *Studies in Russian and Soviet Cinema* 16, no. 1 (2 January 2022): 63, <https://doi.org/10.1080/17503132.2022.2028257>.

the cinematic boom launched in the 1940s, evident by Kazakhfilm's setback in reaching its maximum annual production capacity of six feature films.¹⁷ Abikeyeva summarises the ambiguity by stating Soviet ideologemes under Khrushchev as "national in form, socialist in content" were pervasive, but the Thaw enabled the emergence of narratives that subtly critiqued or expanded beyond rigid ideological structures.¹⁸ Thus, there is no unanimous consensus on how well the Kazakh cinema production did in building an explicitly distinctive 'National cinema'.

2.3 Waves in Kazakh filmmaking

One of the biggest debates is associated with the New Wave period in Kazakh Cinema.¹⁹ On the one hand, modern literature on global new waves is peaking, seemingly embracing the Kazakh New Wave as a trend.²⁰ On the other hand, there is no robust study on the mutual impact between global trends and Kazakh cinema. However, although ongoing, this debate is not new and was first discussed back in the 1990s. Pruner explained the inconsistency and noted that the origin of the term did not emerge in the academic tradition but rather was an instrument for Central Asian filmmakers to stand out at the International Film Festival in Moscow in 1989.²¹ The idea of the dubious provenance of the Kazakh New Wave term resonates widely. Authors believe that it was not developed within the country but was assigned by the festival's critics to match the renewal moods that were increasing due to Perestroika and European cinematographic tendencies.²²

A drastically contrasting view was expressed by another body of literature, originating around the same time as Pruner's critical inquiry and is still supported by contemporary scholarly works. Plakhov's review of Amir Karakulov's *Razluchnitsa* (1991), described as "Truffaut à la Kazakh," highlights the New Wave's European influences, blending psychological minimalism with stark, desolate imagery, evoking filmmakers like Antonioni and Bresson, while reflecting Kazakh cinema's growing artistic sophistication.²³ A crucial permissive factor

¹⁷ Ludmila Zebrina Pruner, 'The New Wave in Kazakh Cinema', *Slavic Review* 51, no. 4 (1992): 792, <https://doi.org/10.2307/2500140>.

¹⁸ Gulnara Abikeyeva and Alim Sabitov, 'Cinema of Soviet Kazakhstan: How Soviet Ideologemes Worked', *Acta Slavica Japonica* 41 (2020): 51.

¹⁹ Beumers, 'Waves, Old and New, in Kazakh Cinema', 203.

²⁰ Tweedie, 'Introduction: Youth, Cities, and the Globalization of Art Cinema', 37.

²¹ Pruner, 'The New Wave in Kazakh Cinema', 791.

²² Andrew Horton and Michael Brashinsky, *The Zero Hour: Glasnost and Soviet Cinema in Transition* (Princeton University Press, 2021), 239, <https://doi.org/10.2307/j.ctv1ddd1fp>; Abikeyeva, 'Kazakh Cinema of the Independence Era. [Казахское Кино Эпохи Независимости]', *Prostor*, no. 12 (2016): 172–73.

²³ Andrey Plakhov, 'French Lessons. [Уроки Французского]', *Iskusstvo Kino*, no. 3 (1992): 154–58.

in this regard was the socio-political context of the period (Perestroika) in general, and the glasnost' policy that overpowered censorship and creative repression in particular.²⁴ Beumers points a broader impact of the phenomenon, as the New Wave was not only an artistic revolution but also a cultural one, reflecting the uncertainties of Kazakhstan's transition to independence.²⁵ For instance, Rashid Nugmanov's *The Needle* (1988) and Serik Aprymov's *The Last Stop* (1989) became emblematic of this movement, blending existential themes with critiques of Soviet-era values.²⁶ Abikeyeva further notes that this era fostered a revival of Kazakh cultural consciousness, as filmmakers began to reclaim traditional myths and histories previously marginalised under Soviet rule.²⁷

Following Kazakhstan's independence in 1991, film production underwent a profound transformation. For Kazakh cinema, it was a moment of reconciling national identity with post-Soviet realities, provoking an infusion of stylistic diversity.²⁸ Knox-Voina further refines this perspective by designating these post-independence developments as the Kazakh "New 'New' Wave," pointing to heightened experimentation and thematic range.²⁹ During this phase, productions grapple with national history — from the traumas of forced collectivisation to the societal disruptions of rapid economic liberalisation, while forging a newly assertive cultural identity. However, the volume of literature on that period is highly limited, and the introduction of the term 'New New Wave' did not receive broader academic recognition.

2.4 Nation-building and cultural revival

Following Kazakhstan's independence in 1991, cinema emerged as a pivotal medium for fostering a cohesive national identity and cultural revival. This period saw state-sponsored initiatives aimed at crafting a unified historical and cultural narrative, often reflecting the first president, Nursultan Nazarbayev's vision for nation-building. Kazakh cinema became a tool

²⁴ Horton and Brashinsky, *The Zero Hour*, 35–36.

²⁵ Beumers, 'Waves, Old and New, in Kazakh Cinema', 204.

²⁶ Gregory A. Waller, 'National Cinema and Film Culture in Kazakhstan', *Asian Cinema* 8, no. 1 (2 August 2012): 39, https://doi.org/10.1386/ac.8.1.39_1.

²⁷ Abikeyeva, 'Kazakh Cinema of the Independence Era. [Казахское Кино Эпохи Независимости]', 173–74.

²⁸ Mette Hjort, 'Affinitive and Milieu-Building Transnationalism The Advance Party Initiative', in *Cinema at the Periphery*, ed. Dina Iordanova, David Martin-Jones, and Belén Vidal, Contemporary Approaches to Film and Television Series (Detroit: Wayne State University Press, 2010).

²⁹ Jane Knox-Voina, 'The Kazakh "New 'New' Wave"', *Studies in Russian and Soviet Cinema* 4, no. 2 (July 2010): 196, <https://doi.org/10.1386/srsc.4.2.195>.

for reclaiming the nation's cultural heritage, asserting a distinct identity, and celebrating Kazakhstan's nomadic and warrior past.³⁰

The transformation of Kazakhfilm Studios into a joint-stock company in 2005 marked a turning point in the state's use of cinema for nation-building. Through strategic investments, the Kazakh government sought to produce films that promoted national unity and historical continuity.³¹ Prominent films such as *Nomad* (2005) exemplified this effort. The movie received \$40 million of government investments to portray Kazakhstan's medieval nomadic heritage and position it within a grand narrative of resilience and unity. These films, heavily supported by state funding, sought to create a shared sense of belonging among the population and to project a unified image of Kazakhstan to the global stage.³² State narratives often emphasised the dual dimensions of Kazakh identity: its ethnocentric elements, rooted in nomadic traditions and historical heroes, and its civic identity, reflecting the multicultural reality of Kazakhstan's population. This approach highlighted the complexities of forging a collective identity in a post-Soviet context where ethnic Kazakhs had been a minority at the time of independence.³³

Kazakh cinema post-independence also focused on reviving cultural traditions and historical memory that had been sidelined during the Soviet era. Films such as *Kazakh Khanate: The Diamond Sword* (2017) explored themes of cultural pride and resilience by revisiting Kazakhstan's nomadic history, warrior ethos, and independence struggles. These cinematic projects were often accompanied by public campaigns, underscoring their role as instruments of state ideology.³⁴ This revival was not without criticism. Scholars argue that the state's promotion of nomadic imagery often simplified the complex and multi-ethnic reality of Kazakh history, aligning it with state-centric narratives of nation-building. Moreover, the adoption of Hollywood-style production techniques in films like *Nomad* raised concerns about the commodification of national heritage for international appeal.³⁵

³⁰ Norris, 'Nomadic Nationhood', 380.

³¹ Rustem Amerkeshev, 'Project Management in the Development of the Creative Industry of the Republic of Kazakhstan: Cinematography', *Quarterly Review of Film and Video*, 18 September 2023, 3, <https://doi.org/10.1080/10509208.2023.2257408>.

³² Isaacs and Polese, *Nation Building and Identity in the Post-Soviet Space*, 142–45.

³³ Abishev, Lumpov, and Smailova, 'The Phenomenon of Partisan Cinema', 65.

³⁴ Norris, 'Nomadic Nationhood', 380–82.

³⁵ Rico Isaacs, 'Nomads, Warriors and Bureaucrats: Nation-Building and Film in Post-Soviet Kazakhstan', *Nationalities Papers* 43, no. 3 (May 2015): 405, <https://doi.org/10.1080/00905992.2013.870986>.

2.5 Challenges of contemporary cinema

Interestingly, the nation-glorifying movies, to a certain extent, were a forced response to the troubles caused by Sacha Baron Cohen's *Borat* (2006), which had a profound effect on Kazakhstan's global image and cultural strategy. The mockumentary, portraying Kazakhstan as a fictionalised Soviet backwater, earned \$262 million worldwide and became the primary association for audiences unfamiliar with the country. Carpenter notes that *Borat* became the "first bit of 'knowledge'" for many about Kazakhstan, prompting defensive reactions from officials who condemned the film and threatened legal action.³⁶ This backlash amplified attention to the mockumentary and highlighted Kazakhstan's struggles with its global portrayal.³⁷ In response, the Kazakh government sent the abovementioned *Nomad* to the American cinemas to boost a positive image of the nation's past, but delays in its release reduced the impact.³⁸ Meanwhile, Yerkin Rakyshev wrote an unauthorised sequel, 'My Brother, Borat', that was supposed to use humour to reclaim control over the narrative but was never released.³⁹ Paradoxically, *Borat* spurred a tourism boom, with international arrivals increasing by 12% from 2006 to 2007, and the government later adopted its catchphrase "Very nice!" for a tourism campaign.⁴⁰ Ultimately, *Borat* catalysed Kazakhstan's efforts to use cinema and tourism as tools for soft power, marking a pivotal moment in the evolution of its cultural identity and highlighting the need to develop nation-branding institutions.

In the 2000s, the Kazakh government took an active role in fostering the film industry as part of its broader nation-building agenda. State-sponsored projects produced by Kazakhfilm were designed to celebrate national identity and promote the Kazakh image internationally. At the same time, independent filmmakers explored contemporary issues, often juxtaposing modern realities with traditional Kazakh themes. This duality reflects the complex interplay between cultural preservation and modernisation. The shift in narrative focus was accompanied by technological and institutional changes. Increased access to international funding allowed filmmakers to experiment with form and content in ways that were previously unimaginable.

³⁶ Robert A. Saunders, 'Buying into Brand Borat: Kazakhstan's Cautious Embrace of Its Unwanted "Son"', *Slavic Review* 67, no. 1 (2008): 78, <https://doi.org/10.2307/27652767>.

³⁷ Jami Fullerton, Alice Kendrick, and Courtney Wallis, 'Brand Borat? Americans' Reaction to a Kazakhstani Place Branding Campaign', *Place Branding and Public Diplomacy* 4, no. 2 (May 2008): 161, <https://doi.org/10.1057/pb.2008.6>.

³⁸ Norris, 'Nomadic Nationhood', 387.

³⁹ 'Kazakhstan Director Shoots Borat Sequel', *BBC News*, 23 November 2010, sec. Europe, <https://www.bbc.com/news/world-europe-11811933>.

⁴⁰ Stephen Pratt, 'The Borat Effect: Film-Induced Tourism Gone Wrong', *Tourism Economics* 21, no. 5 (October 2015): 985, <https://doi.org/10.5367/te.2014.0394>.

However, this financial independence came with its challenges, such as navigating the commercial pressures of global cinema while retaining cultural authenticity.⁴¹ Hence, despite increased production, the film industry still faces significant challenges in achieving commercial success. Amerkeshev highlights the strategic role of government initiatives, such as Kazakhfilm studios and the Eurasia International Film Festival, in fostering cinematic production, describing how they helped to institutionalise cinematic production and support large-scale historical epics.⁴² These policies aimed to institutionalise Kazakh cinema as a key cultural sector, yet challenges remain, including the accessibility of films to general audiences and the financial sustainability of productions. Moreover, even critically acclaimed festival entries such as Sergei Dvortsevoi's *Tulpan* (2008), a Cannes winner, struggled at the box office, grossing only \$150,000 on a \$2 million budget.⁴³ Emerging trends in Kazakh cinema highlight its growing transnational engagement and artistic ambitions. Co-productions with European and Asian countries have become more prominent, reflecting the increasing globalisation of the industry. Furthermore, Kazakh filmmakers are experimenting with genre-blending, combining traditional narratives with modern storytelling techniques to appeal to international audiences.

2.6 Thematic shifts

Another critical area of debate is the continuity of Soviet aesthetics in post-Soviet cinema. While some directors broke free from socialist realist conventions, others retained certain visual and narrative styles. Beumers observes that even in the post-independence period, films often grappled with Soviet themes of collectivism and historical determinism, albeit with a critical lens.⁴⁴ This judgement conflicts with Waller's view that Kazakh cinema tightly adheres to post-colonial motives and seems more focused on moving away from Soviet influence rather than rejecting European ideas or utilising globally trending themes of pan-Asian connections or varieties of Islamic practices.⁴⁵ This duality reflects the broader cultural challenge of navigating a legacy that is both oppressive and foundational. Moreover,

⁴¹ Nick Roddick, 'Letter from Kazakhstan', *Sight and Sound* (London: British Film Institute, November 2011), 906358678, Arts Premium Collection.

⁴² Amerkeshev, 'Project Management in the Development of the Creative Industry of the Republic of Kazakhstan', 2.

⁴³ Beumers, 'Waves, Old and New, in Kazakh Cinema', 206–7.

⁴⁴ Andrew Horton, 'Russia on Reels: The Russian Idea in Post-Soviet Cinema. Ed. Birgit Beumers. Kino: The Russian Cinema Series. New York: I. B. Tauris Publishers, 1999. Xii, 220 Pp. Appendixes. Notes. Bibliography. Index. Filmography. Photographs. \$59.50, Hard Bound. \$24.50, Paper.', *Slavic Review* 60, no. 1 (2001): 218–19, <https://doi.org/10.2307/2697707>.

⁴⁵ Waller, 'National Cinema and Film Culture in Kazakhstan', 45.

scholars such as Isaacs have a drastically different opinion on cinema tradition (dis)continuity and argue that Kazakh filmmakers have adopted hybridised approaches, incorporating global influences like European cinematic traditions while reinterpreting their nomadic and Soviet legacies.

On top of that, the reclamation of Kazakh identity was not uniform. Norris and Isaacs note that early post-independence films often presented an idealised vision of Kazakh traditions, such as nomadism and warrior culture, which were intended to foster national pride.⁴⁶ However, this romanticised portrayal risked oversimplifying complex historical and cultural realities. In contrast, more recent films have adopted a nuanced approach, exploring themes of urbanisation, social inequality, and interethnic dynamics, reflecting the diverse realities of contemporary Kazakhstan.⁴⁷ Overall, this cultural negotiation situates Kazakh cinema as a post-colonial phenomenon, simultaneously grappling with its Soviet past and its aspirations for transnational relevance.

2.7 Theoretical framework

Understanding the evolution of Kazakh cinema's institutional frameworks requires theoretical perspectives that address stability and innovation within established systems. This section focuses on two central concepts: path plasticity and the creative economy.

2.7.1 Path plasticity

While path dependency emphasises the self-reinforcing mechanisms that sustain continuity and lock industries into predetermined trajectories, path plasticity highlights the adaptive capacity of systems to evolve incrementally within existing frameworks.⁴⁸ Rather than viewing historical institutions as rigid constraints, path plasticity focuses on their potential for reorientation and repurposing to meet contemporary demands. This adaptability is crucial in post-socialist contexts, where institutions often inherit rigid structures but must respond to dynamic, globalised economies and cultural shifts. Path plasticity emphasises the role of agency and knowledge recombination in driving innovation within existing

⁴⁶ Norris, 'Nomadic Nationhood'; Rico Isaacs, *Film and Identity in Kazakhstan: Soviet and Post-Soviet Culture in Central Asia* (London: I.B. Tauris, 2018).

⁴⁷ Abishev, Lumpov, and Smailova, 'The Phenomenon of Partisan Cinema', 69–71.

⁴⁸ Theo Notteboom, Peter De Langen, and Wouter Jacobs, 'Institutional Plasticity and Path Dependence in Seaports: Interactions between Institutions, Port Governance Reforms and Port Authority Routines', *Journal of Transport Geography* 27 (February 2013): 29, <https://doi.org/10.1016/j.jtrangeo.2012.05.002>.

institutional paths.⁴⁹ It acknowledges that even highly path-dependent systems retain a degree of flexibility, enabling actors to leverage existing resources and structures to create new opportunities. Unlike the concept of path-breaking innovation, which involves a complete departure from existing systems, path plasticity focuses on transformation through incremental adjustments.⁵⁰ Therefore, it aligns well with the gradual institutional change concept. There, scholars identify mechanisms such as layering and conversion to describe how institutions can evolve without disrupting their foundational structures.⁵¹ Layering involves introducing new elements alongside existing systems, while conversion entails repurposing institutions to achieve new goals. For instance, Slovakia's IT sector exemplifies path plasticity through its reorientation of socialist-era industrial infrastructure toward high-tech applications. By combining inherited technical expertise with global partnerships, Slovakia successfully transformed its industrial base to align with the demands of a knowledge-driven economy.⁵²

In the same vein, path plasticity provides a lens to analyse how Kazakh filmmakers and other industry stakeholders have navigated the tension between continuity and change in a globalising film market. For example, the emergence of independent film festivals in Kazakhstan, such as the Eurasia International Film Festival, can be seen as a form of layering, where new platforms for showcasing domestic and international films are created alongside the traditional dominance of Kazakhfilm.⁵³ Similarly, the exploration of new genres and themes by Kazakh filmmakers, such as historical epics or social dramas that address contemporary issues, might be interpreted as a form of conversion, where existing cinematic expertise and storytelling traditions are being repurposed to resonate with new audiences and reflect changing societal values.⁵⁴

⁴⁹ Simone Strambach and Henrik Halkier, 'Reconceptualizing Change: Path Dependency, Path Plasticity and Knowledge Combination', *Zeitschrift Für Wirtschaftsgeographie* 57, no. 1–2 (1 October 2013): 8–9, <https://doi.org/10.1515/zfw.2013.0001>.

⁵⁰ Emil Evenhuis, 'Institutional Change in Cities and Regions: A Path Dependency Approach', *Cambridge Journal of Regions, Economy and Society* 10, no. 3 (17 October 2017): 515, <https://doi.org/10.1093/cjres/rsx014>.

⁵¹ Streeck Wolfgang and Thelen Kathleen, eds., 'Introduction: Institutional Change in Advanced Political Economies', in *Beyond Continuity* (Oxford University PressOxford, 2005), 22–26, <https://doi.org/10.1093/oso/9780199280452.003.0001>.

⁵² Štefan Rehák, Oto Hudec, and Milan Buček, 'Path Dependency and Path Plasticity in Emerging Industries: Two Cases from Slovakia', *Zeitschrift Für Wirtschaftsgeographie* 57, no. 1–2 (1 October 2013): 59–60, <https://doi.org/10.1515/zfw.2013.0005>.

⁵³ Bauyrzhan Ngerbek, 'The Eurasia-2005 Film Festival: Ambitions and Realities', trans. Vladimir Padunov (Kinokultura, 27 March 2006), <http://www.kinokultura.com/2006/12-nogerbek.shtml>.

⁵⁴ Abishev, Lumpov, and Smailova, 'The Phenomenon of Partisan Cinema', 69–71.

2.7.2 Creative economy

The concept of the creative economy has gained recognition as both a theoretical framework and a policy paradigm. This reflects a perceived shift towards an economic model where value creation is increasingly driven by knowledge, innovation, and creativity.⁵⁵ Throsby emphasises that the creative economy generates economic value and cultural capital, balancing tangible outputs, like revenue, with intangible outcomes, such as identity and heritage.⁵⁶ This dual role is especially pertinent in post-socialist contexts, where historical legacies and institutional arrangements influence the development of creative industries. Thus, one of the foundational claims of the creative economy discourse is its duality as a cultural resource and economic engine.⁵⁷

In Kazakhstan, this duality is evident in the film industry, which simultaneously serves as a platform for promoting national identity and a sector for economic growth. However, the prioritisation of economic metrics often overshadows social and cultural realms.⁵⁸ For instance, despite substantial public investment — 103 projects financed with 19 billion tenge (\$38,246,000) — only 23 films reached theatres, television, or online platforms.⁵⁹ It highlights structural inefficiencies and a tension between artistic ambition and market accessibility. The prioritisation of festivals over commercial audiences reflects a broader trend in the global creative economy, where cultural legitimacy is often sought through international recognition rather than local economic impact.⁶⁰

Lastly, the creative economy underscores local and global dynamics, where policy interventions and international networks intersect. The success of creative industries often

⁵⁵ R. Florida, C. Mellander, and K. Stolarick, 'Inside the Black Box of Regional Development--Human Capital, the Creative Class and Tolerance', *Journal of Economic Geography* 8, no. 5 (21 July 2008): 616, <https://doi.org/10.1093/jeg/lbn023>.

⁵⁶ David Throsby, *Economics and Culture*, 1st ed. (Cambridge University Press, 2000), <https://doi.org/10.1017/CBO9781107590106>.

⁵⁷ Hye-Kyung Lee, 'Introduction. Understanding of the Cultural and Creative Industries in Asia', in *Routledge Handbook of Cultural and Creative Industries in Asia*, ed. Lorraine Lim and Hye-Kyung Lee, Routledge Handbooks (New York: Routledge, 2019), 3–4.

⁵⁸ Mark Banks, 'Creative Economies of Tomorrow? Limits to Growth and the Uncertain Future', *Cultural Trends* 27, no. 5 (20 October 2018): 376, <https://doi.org/10.1080/09548963.2018.1534720>.

⁵⁹ Ministry of Culture and Information of Kazakhstan., 'Kazakhstan's Film Industry: Results of the Cinema Center's Work Over 5 Years. [Киноиндустрия Казахстана: Итоги Работы Центра Кино За 5 Лет]', 20 February 2024,

https://www.gov.kz/memleket/entities/mam/press/news/details/709533?lang=ru&utm_source=in_materials.

⁶⁰ Krzysztof Stachowiak, 'Interplay of the Local and the Global in Connecting Creative Clusters around the Globe', in *Creative Cluster Development: Innovation, Governance and Production*, ed. Marlen Komorowski and Ike Picone, 1 Edition, Regions and Cities (New York: Routledge, 2020), 66–68, <https://doi.org/10.4324/9780429319020>.

hinges on their integration into global production networks while maintaining regional distinctiveness.⁶¹ Kazakhstan faces significant opportunities and challenges in this regard. The country has sought to leverage its historical and cultural assets to gain international recognition, yet its limited distribution infrastructure and dependence on state funding hinder full integration into global creative clusters. For instance, while the Shaken Aimanov Kazakhfilm Studio and the State National Centre for Cinema Support (SNCCS) have provided key platforms for national filmmaking, gaps in domestic distribution networks and international co-production opportunities persist.⁶²

2.8 Conclusion

In sum, the scholarship reviewed in this chapter shows an uneven conversation. It clusters around Soviet-era propaganda studies, the contested New Wave, and post-1991 nation-branding projects. However, it seldom follows the industry beyond the mid-2000s or links aesthetic debates to the concrete rules, money flows, and collaborations that now shape production. This study steps into that gap by pairing two lenses, institutional path plasticity and the creative economy framework. As a result, there are findings in empirical detail on how Soviet institutions' incremental shifts reverberate in the themes, partnerships and market outcomes of film. In doing so, the research bridges the divide between macro-level institutional accounts and micro-level film criticism, offering an integrated explanation of continuity-in-change that is still missing from current debates.

⁶¹ Shoshanah B. D. Goldberg-Miller and Rene Kooyman, 'From Edge to Engine: The Creative Sector's Cultural and Entrepreneurial Power and Promise', in *Entrepreneurship in Culture and Creative Industries*, ed. Elisa Innerhofer, Harald Pechlaner, and Elena Borin, FGF Studies in Small Business and Entrepreneurship (Cham: Springer International Publishing, 2018), 186, https://doi.org/10.1007/978-3-319-65506-2_10.

⁶² UNESCO Office in Almaty, 'Film Industries in Central Asia – A View Today and Towards the Future', 2021, <https://unesdoc.unesco.org/ark:/48223/pf0000380026>.

Chapter 3. Soviet Legacies and Post-Soviet Realities

This study adopts an evolutionary institutionalist perspective, treating the post-1991 transformation of Kazakhstan's film sector as a historically contingent, path-dependent process in which today's organisational field is simultaneously constrained and enabled by inherited Soviet arrangements. To address the transformative changes in the industry discussed in the next chapter, the concept of institutional path plasticity (the ability of actors to layer, stretch/convert or displace rules while preserving elements of continuity) was applied.⁶³ The sub-question addressed in this chapter aims to identify which Soviet-era institutional structures and practices Kazakh cinema has retained or adapted and which have been rejected.

3.1 Applying path plasticity to the Kazakh context

The assessment proceeds in tightly sequenced steps that translate the abstract idea of the "elastic stretch of existing arrangements" through layering, conversion, stretching or displacement into reproducible judgements for each organisation active in Kazakhstan's film sector since 1991.⁶⁴

A baseline inventory was compiled by harvesting names from Soviet production handbooks, post-independence decrees, etc. Formal rule-setting bodies (e.g. the former State Cinema Committee), resource providers (Ministry of Culture, Kazakhfilm, the State Centre for Film Support) and field-configuring events (national festivals) are included. For every institution, a diachronic record was built that tracks legal status, core functions, resource flows and self-descriptions. Time snapshots are scored on four dimensions: (i) Legal status (e.g. abolition, corporatisation); (ii) Core function (production, distribution, training); (iii) Resource flow ($\geq 25\%$ swing in state funding or ownership); (iv) Discursive mandate (explicit mission reframing in statutes or press). Focusing on substance rather than cosmetic reform aligns with Strambach's warning that plasticity rests on micro-level reinterpretations of rules.⁶⁵

The four scores were then translated into a single outcome code: (i) Retained when no more than one dimension changed; (ii) Layered when new functions or resources are added but

⁶³ Strambach and Halkier, 'Editorial. Reconceptualizing Change', 8.

⁶⁴ Notteboom, De Langen, and Jacobs, 'Institutional Plasticity and Path Dependence in Seaports', 29.

⁶⁵ Strambach and Halkier, 'Editorial. Reconceptualizing Change', 4.

original ones persist; (iii) Converted when the organisation's purpose is redeployed while its legal shell and most resources endure; (iv) Rejected when the legal entity is dissolved or lost state support. These thresholds operationalise the incremental change typology of displacement, layering, drift, and conversion outlined by Streeck & Thelen and refined in economic-geography debates.⁶⁶

To see how formal rules play out, each documentary event is read alongside two or more contextual sources drawn from four streams: reputable news reports, peer-reviewed studies, professionals' reviews, and public interviews or speeches (text or video). These materials are not treated as additional facts to be coded; rather, they illuminate the everyday mechanics behind the numbers, exposing issues such as subsidy lines that never reached the project they were earmarked for.

3.2 The Soviet Governance Logic (1922 - 1991)

Vladimir Lenin once famously declared, "Of all the arts, the most important for us is the cinema." Seemingly just a catchy phrase, this statement laid the foundation for the first directive on the Film Business, dictated as early as January 17, 1922. He called for a "definite proportion" of every film programme dedicated to political education, with special attention to rural and eastern regions. His prioritisation of film reflected a broader understanding of media as a tool for shaping public consciousness, especially in a society undergoing ideological and structural transformation. This take on cinema as a political instrument continues to echo, sometimes in transformed ways, in the institutional frameworks that govern Kazakh cinema today.

Bolshevik authorities almost immediately took the cinema industry under control with the establishment of the Cinema Department of the People's Commissariat of Education (Narkompros) by the Russian Soviet Federative Socialist Republic (RSFSR).⁶⁷ By the beginning of 1924, Mikhail Kapchinsky, a well-known Ukrainian director, at the time in charge of the Odessa film studio, expressed his concerns regarding the competition between Soviet film studios in overseas markets and their uneven legal status. In a letter to Goskino,

⁶⁶ Wolfgang Streeck and Kathleen Ann Thelen, eds., *Beyond Continuity: Institutional Change in Advanced Political Economies*, Reprinted (Oxford: Oxford University Press, 2010), 19.

⁶⁷ John Clarke and Gulzira Seksenbayeva, 'Visualizing History: The "Soviet Kazakhstan" Newsreel Series', *Historical Journal of Film, Radio and Television* 38, no. 2 (3 April 2018): 265, <https://doi.org/10.1080/01439685.2017.1300406>.

he proposed the creation of a single, state-owned all-Union film trust with exclusive distribution rights. This proposal illustrates how early debates about the consolidation and standardisation of film governance anticipated the later rigid centralisation that would define much of the Soviet film industry. In a month, Goskino has responded to the letter with reassurance that some efforts have already been made in this direction, for instance, a plan to syndicate republic-level organisations due to constitutional concerns. However, given the embryonic state of the supervisory authority institutions, scholars note the relative creative freedom of the 1920s.⁶⁸ However, this laissez-faire approach to creative experiments did not mean much for the Kazakh movie industry, as its birth is associated with the establishment of Alma-Ata (now Almaty) newsreel film studio in 1935.

Thus, the emergence of Kazakh cinema has been under an already developed system of total control. The decisive moment came with the Politburo resolution of 5 December 1931, which cast film ordered a wholesale re-organisation of the all-Union trust Sovkino into seven specialised trusts covering (i) mass feature films, (ii) instructional and technical films, (iii) newsreel chronicles, (iv) equipment manufacture, (v) film-stock chemistry, (vi) distribution/exhibition and (vii) capital construction. The same resolution set production quotas, rural exhibition targets and a timetable for building thousands of new cinemas, explicitly tasking republican party committees with supervising local studios. It simultaneously ordered a jump from 30,000 to 70,000 projectors within twelve months and tied republican studios to national-level economic plans. The decree embedded cinema inside the first Five-Year Plan logic of quotas and giant state combines.

As a result, at the time, most audiovisual materials were subject to strict censorship, solely instrumental for ideological propaganda.⁶⁹ Day-to-day policing of content was tightened two years later when the Council of People's Commissars of the RSFSR created the Main Directorate for the Control of Spectacles and Repertoire (GURK). GURK enjoyed broad powers to ban, seize or withdraw any public performance or film deemed anti-Soviet, nationalist, religious, "ideologically unsteady" or merely "anti-artistic," and could close non-compliant cinemas and prosecute their managers. This legal infrastructure formalised the

⁶⁸ L Adams, 'Cinema and Theatre', in *History of Civilizations of Central Asia. Towards the Contemporary Period: From Themid-Nineteenth to the End of the Twentiethcentury*, ed. Madhavan Palat, Chahryar Adle, and Anara Tabyshalieva (Paris: UNESCO, 2005), 787.

⁶⁹ Abishev, Lumpov, and Smailova, 'The Phenomenon of Partisan Cinema', 63.

censorial environment in which the early Alma-Ata newsreel studio operated. The newsreel-making was the state's priority due to its comprehensive accessibility and appeal to the less literate population.⁷⁰

Centralisation reached its zenith with the Soviet government's decree of 23 March 1938, which abolished the earlier patchwork of agencies and erected the Committee for Cinematography at the Council of People's Commissars of the USSR. The Committee absorbed every republican studio (including Alma-Ata), distributor and laboratory, and introduced a rigid, ministry-style structure of eleven Main Directorates plus supporting technical, planning and legal departments. Its new monopoly distributor, Soiuzkinoprokat (Film distribution of the Union), guaranteed that decisions taken in Moscow determined what audiences from Minsk to Alma-Ata could see.

Thus, film studios per se evolved from operating newsreel studios, and rose in their significance only in the war period. For Kazakhstan, as noted above, the most notable example was the Alma-Ata national film studio, established in 1941 on the foundation of a newsreel studio. In general, the World War 2 period is associated with the rapid technical development of Kazakh film production due to the evacuation and relocation of major establishments from Moscow (Mosfilm) and Leningrad (Lenfilm).⁷¹ The combined capacity of the newly formed Central United Film Studio (TSOKS) resulted in delivering the overwhelming majority of movies featuring wartime.⁷² Internal orders praised the studios' rapid switch to short Defence films, detailed the directors and technicians to be redeployed, and itemised the rolling stock allocated for equipment, negatives and up to 500 key staff. This influx of technology and human capital laid the technical and creative foundations for the post-war Kazakhfilm studio. On the one hand, it determined the decades-lasting direction of Kazakh film production, specialising in the history of revolution and Soviet comedies.⁷³ The government strategically used cinema to promote an official narrative of Kazakh nationhood, emphasising the country's nomadic and warrior heritage as well as its multi-ethnic identity, shaped by Stalin-era deportations in the 1930s and 1940s.⁷⁴ Hence, it is not surprising that

⁷⁰ Clarke and Seksenbayeva, 'Visualizing History', 266.

⁷¹ Isaacs and Polese, *Nation Building and Identity in the Post-Soviet Space*, 144.

⁷² Amerkeshev, 'Project Management in the Development of the Creative Industry of the Republic of Kazakhstan', 9.

⁷³ Abikeyeva and Sabitov, 'Cinema of Soviet Kazakhstan: How Soviet Ideologemes Worked', 47.

⁷⁴ Isaacs and Polese, *Nation Building and Identity in the Post-Soviet Space*, 116.

Alma-Ata Film Studio of Feature Films and Union's Historical Chronicles got its current name – Kazakhfilm – only in 1960, symbolising the first steps towards the retraction of national identity.⁷⁵

In March 1946, the Committee for Cinematography was upgraded to a full Ministry of Cinematography. The republican studios, including the newly renamed Alma-Ata Chronicle (soon Kazakhfilm), again reported directly to Moscow, now under a plan that earmarked capital for colour laboratories and synchronous-sound equipment. The ministry's first five-year directive revived the newsreel as the preferred vehicle of ideological consolidation, insisting that every republican studio "visualise" Five-Year-Plan targets for rural audiences. This logic majorly framed Kazakhstan's post-war output. Party supervision went beyond scripts: regional committees annotated storyboards and even lighting plans to guarantee that images of Karaganda coal or Jambyl sugar matched the scale of the Fourth and Fifth Five-Year Plans. These practices locked a generation of Kazakh cameramen into a discipline where formal approval and finished reels travelled the same bureaucratic chain. This arrangement was largely retained after 1991.

Although the Khrushchev Thaw (1954-64) loosened some of these strictures on creative freedom, it left the hierarchy intact. Republican branches of the Union of Cinematographers were authorised, giving Alma-Ata directors consultative representation, while new mobile 16-mm projection units extended exhibition to collective farms. In these regards, researchers note that the Kazakh newsreel began to incorporate ethnographic sketches and mild criticism of bureaucratic failings, signalling a tentative layering of documentary realism onto the Stalinist template.⁷⁶ But every script still passed first through the Kazakh Ministry of Culture and finally through Moscow's Goskino, underscoring the centre-periphery dependency.

Under Brezhnev (1965-84), managerial codification replaced experimentation. Goskino's 1977 wage-and-grading decree imposed a union-wide tariff grid that fixed job titles, qualification boards and salary ceilings for every studio, delegating only clerical variants to republican authorities. Two years later, a breast-badge for "Distinguished Worker of Soviet Cinematography" rewarded studios that met ideological and export quotas, tying professional

⁷⁵ Isaacs and Polese, 144.

⁷⁶ Elizabeth A. Papazian, 'Ethnography, Incongruity, History: Soviet Poetic Cinema', *The Russian Review* 82, no. 1 (January 2023): 69–70, <https://doi.org/10.1111/russ.12400>.

prestige directly to plan fulfilment. The decree's annexes still govern contract formulas used by Kazakhfilm today, a clear case of institutional retention through bureaucratic scripting. Yet the same period witnessed incremental conversion of economic levers. By the late 1970s, state distributors allowed limited co-financing from the television sector, and Kazakhfilm quietly established a "creative unit" for commercially viable children's features—a functional shift pursued without altering its legal shell. These informal earnings prepared the ground for the radical reforms of the Gorbachev era.

The watershed was the Council of Ministers decree No 1003 of 18 November 1989, which mandated self-financing for all studios, authorised cooperative production units and abolished the uniform cinema-rental tariff from 1990. The decree reconceived studios as "Associations of Creative Workers" free to sign joint-venture contracts, import equipment and operate branded cinemas. Moscow thus conceded both market autonomy and cultural pluralism, but only within a framework that preserved Goskino's right to issue the union-wide distribution certificate. In practice, Kazakhfilm and a handful of Almaty-based co-ops embraced the new latitude, entering minority co-productions and renting out sound stages, illustrating a classic example of institutional stretching rather than outright displacement.

3.2.1 Key takeaways

This section has shown that post-1945 Soviet film policy deposited a layered institutional landscape in Kazakhstan rather than a single monolith. At its core lies the vertical command complex embodied by the Ministry/Goskino directorate, the monopoly distributor Soiuzkinoprokat, and the nationwide censorship-licensing chain. All of those elements remained structurally unaltered from high Stalinism through Perestroika.

Over this backbone, successive policy waves introduced functional add-ons: Thaw-era rural projection brigades, Brezhnev-era tariff grids and reward badges, and late-1970s television co-financing windows. Each addition expanded capacity without dismantling the underlying hierarchy. Finally, the 1989 self-financing decree opened a nascent market layer, legalising cooperatives and profit-sharing while still anchoring them to the centre's certificate system.

The result is a three-tier field that, by 1991, comprised (i) long-standing control bodies (Ministry branch, censorship boards), (ii) production–distribution organisations whose mandates had gradually broadened, and (iii) newly legitimised but still marginal cooperative

outfits. This sedimented mix constitutes the empirical baseline for Section 3.3, where each organisation's post-independence trajectory will be traced against the criteria of retention, adaptation and rejection.

3.3 Post-Soviet Trajectories: Retention, Adaptation and Rejection (1991 – 2024)

The scoring protocol outlined in section 3.1 was applied to organisations that have shaped Kazakhstan's film field since independence. Table 3.1 below summarises the outcomes of the major selected organisations. The narrative that follows groups the cases by outcome code and highlights the rule dimensions (legal status, function, resource flow, discursive mandate) that tipped the balance ("S" for Stable and "C" for Changed).

3.3.1 Discontinuities

Paragraph 4 of Cabinet Decree 909/1995 briefly preserved the Soviet era Kazkinoprokat monopoly, but the very next year, Resolution 1032/1996 split the combine and left no successor to handle nationwide distribution. The organisation was dissolved, its print archive handed to the State Film Fund, and its staff dismissed or absorbed by cinemas. Without legal status, budget or mandate, the node disappeared, forcing exhibitors to contract directly with producers. This problem is persisting today. There is a notable distribution monopoly held by a small number of cinema chains. For instance, Abikeyeva, a foundation film scholar and critic, points out that the biggest distribution network, KinoPark, is very selective in screening nationally funded movies. Kinopark reportedly felt aggrieved after SCNSC declined to subsidise cinema distribution costs, especially critical during the COVID-19 pandemic, which severely impacted the cinema business.⁷⁷ Thus, the abolishment of Kazkinoprokat is the purest example of "Rejected", when a Soviet command pillar was deemed incompatible with the emergent private multiplex sector. Nevertheless, it also demonstrates that merely removing centralised state distribution does not automatically foster favourable and competitive market conditions.

A similar rapid fate was deemed by the Inter-ministerial Commission on National Film Funding. Created in 2019 to ensure transparency by giving ten ministries a collective veto over subsidy lists, the Commission survived barely three funding rounds. This structure

⁷⁷ Nikolay Pak, 'Where to Get Money for Movies in Kazakhstan? Kazakhfilm, "Tomiris", "Kazakh Business", "Dos-Mukasan". [Где Взять Деньги На Кино в Казахстане? Казахфильм, «Томирис», «Бизнес По-Казахски», «Дос-Мукасан»]', Serial Producer, 4 May 2023, https://www.youtube.com/watch?v=UOwwK_xbHXQ.

effectively overrode the role of the Expert Council, which had originally been envisioned as the core decision-making body. According to the initial legislative concept, the Expert Council, a panel of professional evaluators from the industry, was to make final funding decisions, embodying a more technocratic and independent model. However, under the enacted law, the Council was relegated to a merely advisory role, with its recommendations not being publicly accessible.⁷⁸ In this context, the Commission introduced a logic far more reminiscent of Soviet-era governance: decisions over cultural production were dispersed across multiple state ministries, privileging bureaucratic consensus and diffuse accountability. Government Resolution of 2022 abolished it, arguing in the explanatory note that the body duplicated SCNSC procedures and slowed disbursement. With its legal charter annulled, its gate-keeping function and moral discourse vanished overnight, and it never possessed its budget but was bridging it between the Ministry of Culture and SCNSC. All four rule dimensions were flipped, making the Commission a clear “Rejected” outcome. This case can be treated as evidence that layering can be rolled back when it proves more nuisance than a safeguard.

3.3.2 Ministry

Kazakhstan’s ministerial chain shows strategic layering rather than structural rupture. Therefore, each rebranding of the Soviet lineage (1992 State Committee → 1996 Culture Ministry → 2003 Culture & Information → 2014 Culture & Sports) was triggered less by film-sector logic than macro-political imperatives. Those included budget austerity in the 1990s, presidential nation-branding after 2000, and a “Sport-image” agenda ahead of mega-events after 2010.⁷⁹ Crucially, every statute redefining the ministry preserved an unbroken article that empowers the minister to license, fund and certify films. The cinema mandate was, therefore, path-dependent “High-authority Content” that political elites found risky to dismantle. Layering new portfolios (first “information”, later “sport” and “creative industries”) solved two coordination problems simultaneously. Firstly, it allowed the presidency to centralise symbolic economy tools (media narratives, heritage campaigns, sports diplomacy) inside the same budget that already possessed a vetted subsidy pipeline and censorial expertise. Secondly, it shields that pipeline from liberal privatisation driven by

⁷⁸ Nikolay Pak, ‘Your Scripts Are Rubbish! | Rashid Nugmanov And Anna Chakirtova | Cinema In Kazakhstan. [Дрянъ Ваши Сценарии! | Рашид Нугманов И Анна Чакиртова | Кинематограф В Казахстане]’, Serial Producer, 12 May 2022, <https://www.youtube.com/watch?v=jTN87j0a78Y>.

⁷⁹ Adrien Fauve, ‘Global Astana: Nation Branding as a Legitimization Tool for Authoritarian Regimes’, *Central Asian Survey* 34, no. 1 (2 January 2015): 113, <https://doi.org/10.1080/02634937.2015.1016799>.

framing it as part of a larger public-goods mission. The nominal budget increase between 2005 and 2008, and the 2021 transfer of Kazakhfilm's share package to the ministry's Culture Committee reinforced this logic. Consequently, greater cash and equity control compensated officials for taking on wider mandates without requiring a redesign of entrenched procurement routines. Hence, what looks like constant reorganisation stretches the original Soviet governance logic: the cinematic core remains intact but is enveloped by ever-thicker layers of soft-power policy, confirming the outcome "Layered" and illustrating the stretch-conversion variant of institutional path plasticity.

3.3.3 Kazakhfilm

Established in 1935 as Alma-Ata Newsreel Studio and reconsolidated several times under Soviet Goskino, the studio has remained the material core of Kazakhstan's film production. After independence, it kept its legal continuity as a state-owned joint-stock company. However, its resource logic has been drastically converted twice. First, the 2019 Cinematography Law channelled most public money through the newly created State Centre for the Support of National Cinema, leaving Kazakhfilm without direct line-item subsidies. Six years later, only 30 % of the public envelope was decided to be back to the studio.⁸⁰ Yet, those funds are earmarked strictly for co-financing theatrical projects, not payroll, maintenance, or other operational costs. Consequently, the current CEO, Aidar Omarov, is actively replacing the full-subsidy culture with mixed financing: high-grossing domestic comedies and horror titles leverage private investors, while state funds are targeting socially significant films that should seek funding through the newly established State Centre for Support of National Cinema.⁸¹

The budget cuts are likely caused by several public scandals, implying fraud. For example, despite full access to public funds up until 2019, the studio's 1967 campus urgently needs renovation.⁸² Recently replaced management is courting business partners by offering

⁸⁰ Zhandos Karashash, 'Balayeva: 30% of the total amount of state funding for cinema will be allocated to Kazakhfilm. [Балаева: 30% от общего объёма госфинансирования кино направят «Казакхфильму»]', Forbes.kz, 26 March 2025, <https://forbes.kz/articles/balaeva-30-otobshego-obyoma-gosfinansirovaniya-kino-napravyat-kazahfilmu-b91eb3>.

⁸¹ ORDA News, 'Cinema in Ruins: Kazakhfilm as a Symbol of the Post-Colonial Era. How Does the Ministry of Culture Revive It?. [Кино в Руинах: «Казакхфильм» Как Символ Постколониальной Эпохи. Как Минкультуры Возрождает Его?]', YouTube, 24 April 2025, <https://www.youtube.com/watch?v=MFEs8h5oQMo>.

⁸² Zhanel Abdrakhmanova, "'Just depressing": Bayan Alaguzova was horrified by the state of Kazakhfilm. ["Просто удручает": Баян Алагузова пришла в ужас от состояния "Казакхфильма"]', 19 September 2023,

land-lease options and a future multiplex on site, hoping to channel part of box-office revenues (as some films now reached the capability to gross over a billion tenge – almost 2 million US dollars) into building repairs. Recent policies also promote international co-production (e.g. Uzbek and Russian ventures) and service work for streamers such as Netflix’s Golden Horde series, supported by flexible discount rates for backlot rental.⁸³ At the same time, Kazakhfilm remains accountable to the Ministry of Culture as its sole shareholder, which tasks the studio with non-commercial mandates such as 4K restoration of Soviet classics. These moves illustrate institutional path plasticity: the Soviet-era production shell is retained, but its funding model and partnership portfolio have been stretched and converted to survive in a market-streaming environment while still fulfilling cultural policy goals. Overall, Kazakhfilm is “Converted” into an ambiguous institutional actor, navigating between public mandates and market logic. Ironically, once the sole symbol of Soviet Kazakh cinema, it now operates across overlapping roles (producer, co-financier, and infrastructure provider) rather than serving as a clear-cut state studio. Thus, its modern development and reinvented social role in society will be further examined in the following chapters, considering the newly emerged frameworks in the Kazakh cinema industry.

3.3.4 State Centre for the Support of National Cinema (SCNSC)

The SCNSC is the clearest example of institutional layering aimed at solving the chronic single-window problem that dogged film subsidies since Soviet times. Created by Government Resolution 113 of 15 March 2019, the Centre did not displace either the Ministry or Kazakhfilm. Instead, it was superimposed between them to professionalise project selection and ring-fence money flows. Three design choices show how policymakers stretched the inherited command logic rather than abandoning it. Firstly, by opting for a joint-stock form, drafters could place the Centre on the Treasury’s balance sheet yet sidestep civil-service pay caps, allowing it to hire market-rate readers and lawyers while remaining fully answerable to the Culture & Sports Ministry as sole shareholder, making a layer, not a break, in the hierarchy. Secondly, the Order set ex-ante funding ceilings per category ($\geq 35\%$ of the annual envelope for “socially significant” films,

<https://www.zakon.kz/kultura-shoubiz/6407380-prosto-udruchaet-bayan-alaguzova-prishla-v-uzhas-ot-sostoyaniya-kazakhfilma.html>.

⁸³ ORDA News, ‘Cinema in Ruins: Kazakhfilm as a Symbol of the Post-Colonial Era. How Does the Ministry of Culture Revive It? [Кино в Руинах: «Казахфильм» Как Символ Постколониальной Эпохи. Как Минкультуры Возрождает Его?].’

separate caps for debuts, events and co-productions). This converted opaque ministerial grant committees into a rules-based allocation system but still channelled every tenge through the state budget, preserving the Socialist norm that cinema is a public good. Lastly, while the Centre runs open calls, the 2019-2022 Inter-ministerial Commission on National Films retained veto power over the final shortlist. Thus, political oversight was temporarily layered on top of a technocratic screen, mirroring the Soviet two-key system evidenced as early as Kapchinsky's proposition of 1924 (Expertise + Party approval) rather than replacing it. Early outcomes confirm this hybrid logic.

However, there is a much bigger problem associated with the institution. Despite its formal mandate to professionalise and streamline film financing, the SCNSC inherited and entrenched a deep-rooted pathology: Kazakhstan's cinema economy generates returns not at the point of distribution but at the point of production. In other words, profits are effectively captured through budget appropriation rather than box office performance. This structure results in perverse incentives to complete films on time rather than well. Another obstacle to market competition is that SCNSC subsidies cover only production costs, with no funds allocated for development (e.g. scripts) or distribution. Hence, the system rewards the ability to complete a film, not to develop a strong concept or bring it to market. Pitching rounds, intended as merit-based selection mechanisms, are routinely prolonged, with contracts often signed only by the third quarter, leaving filmmakers scrambling to meet the fiscal year-end.⁸⁴ Since public grants cannot roll over, production teams either freeze operations in January or continue working without legal cover until new contracts are issued, often months later.⁸⁵

The current setup might disincentivise long-term planning, suppress script quality, and undermine collective creativity, narrowing it to a top-down description of a nationally significant theme. Overall, despite a superficial image of a brand-new entity established amid independence, SCNSC operationalises the Soviet template of monopolised, state-mediated financing, now clad in a quasi-corporate shell, which fits well into the path-plasticity framework.

⁸⁴ Pak, 'Where to Get Money for Movies in Kazakhstan? Kazakhfilm, "Tomiris", "Kazakh Business", "Dos-Mukasan". [Где Взять Деньги На Кино в Казахстане? Казахфильм, «Томирис», «Бизнес По-Казахски», «Дос-Мукасан»]'.
⁸⁵ Pak, 'Your Scripts Are Rubbish! | Rashid Nugmanov And Anna Chakirtova | Cinema In Kazakhstan. [Дрянъ Ваши Сценарии! | Рашид Нугманов И Анна Чакиртова | Кинематограф В Казахстане]'.

3.4 Conclusion

Across the 26 organisations scored, institutional continuity rather than rupture dominates Kazakhstan’s post-Soviet film field. Only two bodies, the Inter-ministerial commission and the Soviet-style state distributor, were fully discarded. Most others exhibit a spectrum of layering or conversion. That pattern flows directly from the legal core of the 1996 Law “On Culture” and its 2006 revision, both of which enshrine cinema as a public good to be certified, funded and archived by the state. Every later statute, from the Cinematography Law (2019) to the Cultural-Policy Concept (2023 - - 2029), re-states that doctrine before adding new instruments. Hence, reformers rarely amputate institutions; they stack digital platforms, joint-stock shells or formula-based grants atop a Soviet backbone that elites still consider politically reliable and symbolically valuable. Table 3.1 reflects the evolution of the five most representative institutions in the film industry since 1991.

Table 3.1 *Outcome scores for key organisations in the Kazakh film industry since 1991*

Organisation (baseline 1991)	Legal	Function	Funds	Discourse	Outcome	Decisive policy (selection)
Ministry	S	C	C	C	Layered	2006 on Culture; 2019 Cinematography Law; 2021 staff-limit decree (№ 195)
Kazakhfilm	C	S	C	C	Converted	Gov. Res. 1032/1996; 2021-23 Modernisation Roadmap
State Centre for Support of National Cinema	C	C	C	C	New/Layered	Gov. Res. 113/2019
Inter-ministerial Commission on film funding	S	S	C	S	Rejected	PM Order 108-p/2019; Gov. Res. 268/2022
Kazkinoprokat (Centralised state distributor)	C	C	C	C	Rejected	CM Res. 909/1995 § 4; Gov. Res. 1032/1996

Source: By the author, based on information obtained from policy documents

Notably, none of the organisations examined in this study met the criteria for institutional Retention. Even those that preserved elements of the Soviet governance logic, such as centralised financing or cultural mandates, did so through mechanisms of layering or conversion. This absence of pure continuity suggests that Kazakhstan’s film field has selectively restructured inherited components to fit evolving policy, fiscal, and symbolic goals and adapted to the globalising environment.

The dominant change mechanism is layering. Whether through the EAIS ticket portal, the codified grant ratios, or the quasi-corporate State Centre for Support of National Cinema, policymakers solved coordination and transparency deficits by adding rule-sets instead of dismantling old ones. Layering keeps the trusted subsidy pipeline intact, lets ministers retain final veto power, and satisfies international donors who read the reforms as market-oriented. Where layering proved a stable change model, there were some exceptions. For instance, the Inter-ministerial commission was quickly peeled away, showing that grafted layers remain expendable if they obstruct cash flow or timelines.

Conversion appears where a Soviet shell holds unique physical or symbolic assets. Kazakhfilm, a studio with real estate, back-lots and a brand, was not privatised but pushed to court private finance while retaining restoration work for the ministry. The state preserved ownership but rewrote internal resource rules to hedge fiscal risk and attract new legitimacy (foreign co-productions, streaming clients, and other actors discussed in the following chapter).

Finally, outright rejection is rare and instructive. Eliminating the single state distributor in 1996 and the funding commission in 2022 marked moments when Soviet or overly bureaucratic nodes visibly blocked the growth of a multiplex economy or delayed annual grant calendars. Yet those removals did not weaken state authority. Instead, they re-centralised power in the ministry-SCNSC dyad, illustrating how rejection can serve consolidation rather than liberalisation.

In sum, the Kazakh case confirms the path-plasticity proposition: high-authority cultural institutions seldom die – they bend. The post-1991 trajectory is best read as a long-term choreography in which managers continuously stretch, veneer and occasionally prune the Soviet governance scaffold to meet fiscal, technological and image-building pressures. This hybrid architecture enables incremental innovation (rebates, digital certificates) and constrains deep market transformation, leaving Kazakhstan with a film regime that is simultaneously modernised and unmistakably post-Soviet.

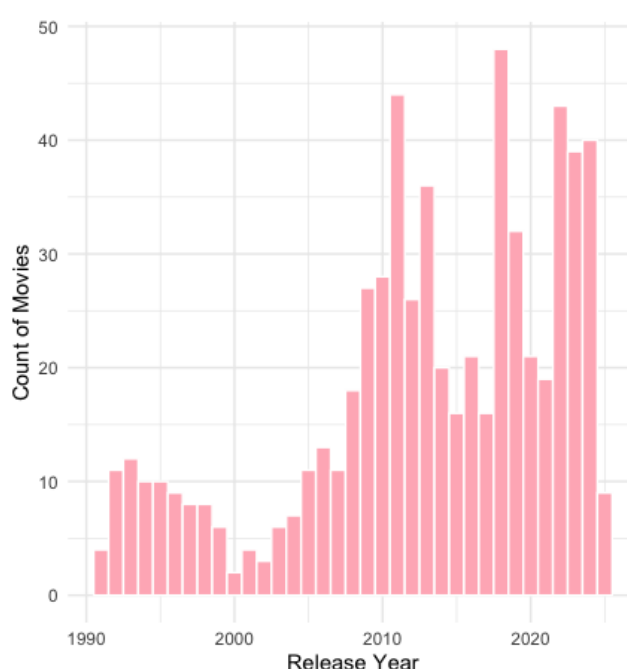
Chapter 4. New Actors, New Frameworks

Despite the largely preserved Soviet institutional structures, it is hard to deny that independence in 1991 brought seismic shifts to Kazakhstan's film industry. The once-monolithic Soviet model, epitomised by the state-run Kazakhfilm studio and centralised distribution, gave way to an uncertain terrain where new institutional actors began to emerge. This chapter highlights the dynamics between the venerable Kazakhfilm studio and the emerging private sector, the strategies of filmmakers working outside state structures, the infusion of foreign capital and collaborations, and the transition from Soviet distribution networks to market-oriented channels. Through this exploration, an industry in flux, layering fresh frameworks onto Soviet legacies and converting old institutions to serve new purposes, as Kazakh cinema navigated the demands of a globalising era while striving to maintain a distinctive national voice, is evident. As a result, Kazakhstan's cinematic voice today is neither a simple echo of Soviet socialist realism nor a wholesale adoption of Western genre tropes. Instead, it foregrounds steppe imagery and oral heritage, employs poetic-realist techniques, and oscillates between Kazakh and Russian linguistic registers to symbolise the nation's post-colonial self-interrogation. Overall, the chapter answers the second sub-question of the current thesis: What new institutional actors and frameworks emerged in Kazakh cinema after 1991, and how did they interact with inherited Soviet-era institutions?

4.1 Adapting to market logic

Figure 4.1 shows the annual count of feature-length Kazakh films released between 1991 and 2024. In the immediate post-independence years, production volumes remained low, reflecting the collapse of Soviet subsidy structures; a brief uplift around the mid-2000s coincides with early private attempts at commercial filmmaking; and from roughly 2010 onwards we see an explosive growth in output, peaking in the late 2010s and stabilising at a markedly higher level than during the Soviet and early post-Soviet eras. This trajectory might hint at the emergence of Kazakhstan's creative economy: film production has shifted from a purely state-led cultural apparatus into a multiplier sector actively generating GDP and employment.

Figure 4.1 *Histogram of movie releases per year, 1991-2024*



Source: By the author, based on the IMDB non-commercial dataset

However, there were attempts by the government to re-centralise the sector. In 1996, Kazakhfilm was split into a Film Factory holding the facilities and a National Production Centre, expected to contract out creative work to independents. When that model failed as distribution channels had evaporated and private studios defaulted on their loans, the two entities, together with the print archive and state distributor, were re-merged in March 2000 as the Republican State Budget Enterprise Kazakhfilm National Company.⁸⁶ The re-merge restored vertical integration and effectively froze private competition for another decade, explaining why Kazakhfilm remained dominant until recent reforms.

This instructive illustration of the push-and-pull between market logic and cultural stewardship is the still-unfinished saga of Kazakhfilm’s attempted privatisation. In February 2015, the Ministry of Finance placed a 49% stake in the studio on the block, valuing the whole company at ₸3.4 billion (ca. \$18 million) and scheduling a direct sale for December of that year.⁸⁷ Within months, however, filmmakers, cultural NGOs, and MP Kuanysh Sultanov warned that “a private, or worse, foreign, buyer” would liquidate the Almaty backlot for

⁸⁶ UNESCO Office in Almaty, ‘Film Industries in Central Asia – A View Today and Towards the Future’, 13.

⁸⁷ Aldiyar Kosenov, ‘Kazakhfilm Film Studio is valued at 3.4 billion tenge. [Киностудия “Казакхфильм” оценена в 3,4 миллиарда тенге]’, Tengri News, 18 February 2015, <https://tengrinews.kz/cinema/kinostudiya-kazakhfilm-otsenena-v-34-milliarda-tenge-270301/>.

property gains and strip the state of its only heritage repository.⁸⁸ Their campaign succeeded in having the studio struck from the privatisation roster during the 2016-18 revisions of the asset-sale plan. Paradoxically, the issue has now swung to the opposite extreme: draft amendments unveiled in November 2024 allow the Ministry of Culture to channel “not less than 30%” of the national film-support envelope straight to Kazakhfilm from 2025, formally re-entrenching public ownership in the name of safeguarding strategic culture.⁸⁹ The episode exposes a core contradiction in the creative economy agenda. While policymakers invoke market discipline to modernise the sector, cinema’s symbolic weight makes full commodification politically untenable, producing cyclical oscillations between tentative divestment and renewed state embrace.

4.2 Rise of private production

In the wake of independence, Kazakhstan’s film industry saw a gradual emergence of a new class of actors – private production studios. Throughout the 1990s and early 2000s, Kazakhfilm, the historic state-backed studio, remained the primary producer of domestic films. It completed hundreds of films in the post-Soviet era and continued to account for the majority of annual releases.⁹⁰ By the mid-2010s, however, this balance had decisively changed. Film critic Gulnara Abikeyeva notes that only about 10% of the roughly 60 films now produced each year are state-funded, down from near-total dominance by Kazakhfilm a decade prior.⁹¹ The rise of privately financed studios not only increased the sheer number of local films but also diversified genres and styles, catering to evolving audience tastes in a new market economy.⁹² Significantly, this shift also gave rise to a new generation of filmmakers who challenged aesthetic conventions and tackled themes previously avoided in official cinema. Yerlan Nurgaliyev’s *Sweetie, You Won’t Believe It!* (2020), a horror-comedy involving absurd violence and gender parody, garnered international ‘buzz’ for its daring tone and departure from state-sanctioned narratives. Similarly, Aisultan Seit’s *Qash* (2022) pushes

⁸⁸ Daniyar Kunafin, ‘MP asks to exclude Kazakhfilm from the list of privatization. [Исключить из списка приватизации «Казахфильм» просит депутат]’, *Zakon.kz*, 24 January 2018, <https://www.zakon.kz/redaktsiia-zakonkz/4900294-isklyuchit-iz-spiska-privatizatsii.html>.

⁸⁹ Zhanna Nurmaganbetova, ‘Kazakhstan to Revive Shaken’s Stars Film Festival’, *Qazinform*, 08:31:00+00:00, <https://qazinform.com/news/kazakhstan-to-revive-shakens-stars-film-festival-a6317a>.

⁹⁰ Embassy of the Republic of Kazakhstan in the United Kingdom of Great Britain and Northern Ireland, ‘Cinema’, Website of government bodies, 8 April 2020, <https://betaegov.kz/memleket/entities/mfa-london/press/article/details/8511>.

⁹¹ Eric Song, ‘Can Kazakhstan’s Film Industry Succeed at Home and Abroad?’, *OpenDemocracy*, 22 September 2022, <https://www.opendemocracy.net/en/odr/kazakhstan-film-industry-success-domestic-foreign/>.

⁹² Dana Amirbekova et al., ‘New Model of Contemporary Kazakh Cinema – Artstream: Trends and Paradigms’, *Open Cultural Studies* 9, no. 1 (18 March 2025): 13, <https://doi.org/10.1515/culture-2025-0050>.

boundaries by blending historical fiction with horror aesthetics to depict the Kazakh famine in visceral, often shocking ways. Its exaggerated violence and symbolic use of Kazakh cultural motifs challenge official narratives (unlike Ukraine's Holodomor, labelled as deliberate genocide, the Kazakh government prefers to silence the issues of the Great Famine), provoking debate on ethnic trauma and historical representation. Serik Aprymov's *The Hunter* (2004) offered an unsettling meditation on rural isolation and moral ambiguity, reflecting broader social dislocation. Earlier, *Racketeer* (2007) had already caused controversy for its sympathetic portrayal of post-Soviet gang culture. These films signalled not only a loosening of ideological boundaries but also the emergence of new voices willing to explore taboo subjects, genre hybridity, and subversive humour. These traits would have been unimaginable in the era of Soviet or early post-independence film governance.

However, the first surge of market-led filmmaking after independence was short-lived. Between 1991 and 1995, no fewer than 28 private studios registered in Almaty alone. The pioneer, *Katarsis*, made around 70 feature films between 1989 and 1996.⁹³ Yet the institutional vacuum left by the Soviet collapse offered neither distribution finance nor copyright protection. Output collapsed from eleven features in 1993 to a single film in 1999, signalling that early privatisation, unbacked by state guarantees, could not sustain a national production base. The episode illustrates the chapter's broader argument that markets filled the void only fleetingly before the state reasserted itself.

One of the pioneering success stories for private studios was *Sataifilm* (also spelt *Satayfilm*). Founded in 2003 by director Akan Satayev, *Sataifilm* delivered one of the first post-independence commercial blockbusters with the crime drama *Racketeer* (2007).⁹⁴ Satayev's triumph demonstrated that a Kazakh filmmaker, outside the state system, could draw large local audiences with slick genre fare. *Sataifilm*'s early output, action thrillers and dramas, helped lay the groundwork for a commercially viable domestic film market. Tellingly, Satayev's prominence led to his appointment as head of *Kazakhfilm* in 2020, symbolising the growing synergy between the once-dominant state studio and the new private sector.⁹⁵ Through *Sataifilm*'s breakthrough, Kazakh cinema in the 2000s proved it could produce

⁹³ UNESCO Office in Almaty, 'Film Industries in Central Asia – A View Today and Towards the Future', 13.

⁹⁴ Beumers, 'Waves, Old and New, in Kazakh Cinema', 206.

⁹⁵ Aizada Arystanbek, 'Kazakhfilm Begins Implementation of 3-Year Modernization Plan', *The Astana Times*, 18 May 2021, <https://astanatimes.com/2021/05/kazakhfilm-begins-implementation-of-3-year-modernization-plan/>.

technically proficient, crowd-pleasing films with local talent and funding, reducing reliance on public funds.

If studios like Sataifilm brought Kazakh action and drama to the big screen, a parallel boom in comedy cemented the clout of private producers. Nurtas Production, led by actor-director Nurtas Adambay, exemplifies this trend. Adambay's *Kelinka Sabina* (2014), a broad domestic comedy, became a runaway hit and spawned a franchise, highlighting how privately backed Kazakh films could dominate the box office.⁹⁶ Its success alongside other highly successful franchises, like Nurlan Koyanbayev's *Kazakh Business*, marked a turning point: local audiences flocked to see their own humour and social realities reflected on screen, and investors took note. Those films demonstrated the profit potential of Kazakh-language popular cinema, ushering in an era where privately financed comedies and commercial dramas far outnumber state art-house projects. Consequently, Nurtas Production has since expanded its repertoire. For example, it started venturing into genre films like the psychological thriller *The Elevator* (2018), although it remains best known for tapping the pulse of Kazakh pop culture.⁹⁷

By normalising profitability in Kazakh cinema, independent directors significantly broadened the industry's institutional base beyond Kazakhfilm. In the late 2010s, the rise of digital content studios further transformed the production landscape. Foremost among these is Salem Social Media (now Salem Entertainment), a private company that began by creating web-based sketch comedies and series for online audiences. Salem leveraged Kazakhstan's exploding social media viewership to incubate new talent and formats. Indeed, Salem Social Media democratised access to the creative industry for many debut filmmakers and actors who honed their craft in its viral videos before graduating to feature films.⁹⁸ Over time, Salem translated this success into larger productions and its streaming platform. By 2025, the company boasted partnerships with telecom operators and 700,000 paid subscribers, reflecting a massive domestic interest in homegrown entertainment delivered online.⁹⁹ Salem's journey, from Instagram Reels and YouTube shorts to full-length films and international co-productions, illustrates the new model of a vertically integrated media studio.

⁹⁶ Aigerim Manakbayeva and Olga Nikolayeva, 'Reflection of Public Policy in Cinema: Sociological Analysis on the Example of Kazakhstan', *Public Policy and Administration* 20, no. 5 (2021): 732.

⁹⁷ Amirbekova et al., 'New Model of Contemporary Kazakh Cinema – Artstream', 13.

⁹⁸ Amirbekova et al., 9.

⁹⁹ Abuova, 'Kazakhstan's Film Industry'.

Equally notable among the new players is Qara Studios, epitomising the synthesis of auteur cinema with commercial viability. Founded by young filmmakers, Qara Studios focuses on high-quality projects targeting both local and international audiences. Their breakthrough project was *Qash* (2022), an ethnographic horror film set during the 1930s famine, directed by Travis Scott's music video director Aisultan Seitov. *Qash* employed professional actors and top-notch production values, and its success was twofold: the film resonated with domestic viewers through its culturally specific story, and it garnered international acclaim by winning Best Director at the Shanghai International Film Festival – a first for a Kazakh debut feature.¹⁰⁰ In a sense, Qara Studios represents the maturation of Kazakhstan's private film sector: it stands on the shoulders of earlier commercial hits, yet reaches outward with bold artistic ambition and global recognition.

However, the most significant breakthrough in globalising Kazakh cinema in economic terms has been Production Co. Art Dealers. They gained their name with Yernar Nurgaliyev's slasher *Sweetie, You Won't Believe It!* that signaled a bold inflexion point in the rise of private Kazakh cinema. Released in early 2020, the film garnered both controversy and acclaim for its ultraviolent, absurdly humorous portrayal of a fishing-trip gone awry, centring on a stressed father-to-be and a raft of slapstick carnage. It earned international festival notice at Toronto After Dark and Cannes. Later, it was sold for distribution in the USA and UK by 101 Films, as well as in Germany and German-speaking Europe by Lighthouse Home Entertainment, becoming one of the first Kazakh movies available on Amazon Prime.¹⁰¹ This film is emblematic of a new wave of private productions that push genre boundaries, graphic transgression, and international ambition. Those elements are far removed from the state-centred, historically reverential fare of the Kazakhfilm era.

Together, Kazakhfilm, Salem, Sataifilm, Nurtas Production, Qara Studios, Art Dealers, and dozens of other firms now constitute a plural and dynamic production ecosystem. Kazakhfilm remains the venerable backbone, a studio that still co-produces prestige projects and nurtures talent with state support, but it no longer monopolises the scene. Private companies run by

¹⁰⁰ 'Kazakhstan's Aisultan Seitov Wins Best Director Award at Shanghai International Film Festival', The Astana Times, 16 June 2023, <https://astanatimes.com/2023/06/kazakhstans-aisultan-seitov-wins-best-director-award-at-shanghai-international-film-festival/>.

¹⁰¹ Dmitriy Mostovoy, "'Sweetie, You Won't Believe It' in the US and UK. [«Жаным, ты не поверишь» в США и Великобритании]", 27 June 2021, <https://orda.kz/zhanym-ty-ne-poverish-v-ssha-i-velikobritanii/>.

directors, comedians, and internet entrepreneurs have become key institutional actors in post-1991 Kazakh cinema. They have introduced new business models (from franchise comedies to web-series incubators) and new voices, all while increasing the volume of films released each year. This profusion of studios and styles since independence has given Kazakh cinema an unprecedented vitality, as local audiences enjoy a richer menu of films than ever before and filmmakers find many avenues to bring their visions to the screen. The rise of private production companies, in short, has propelled Kazakh cinema from the stagnation of the early 1990s into a more diverse industry in the 21st century.

In policy rhetoric, the surge in privately financed hits after 2010 is habitually credited to the 30% cash-rebate scheme.¹⁰² A broader comparative lens shows something subtler. UNESCO's Creative Ecosystem model stresses that young studios flourish first as informal networks of individual talent before formal institutions catch up. Additionally, Deloitte's Netflix-funded study argues that disposable income is the primary long-run demand driver: once basic needs are met, households reallocate spending towards outputs of the creative economy.¹⁰³ Thus, the steep climb in average urban wages between 2011 and 2018 explains why shoestring comedies such as *Kelinka Sabina* (2014) could recoup in weeks without state promotion. Private producers rode the purchasing-power curve, confirming that Kazakhstan's first sustained boom was market-led, with cultural policy arriving only afterwards to codify an ecosystem already in motion.

The same output curve of rising interest in national cinema and decline of so-called cultural discount depicted in figure 4.1 reflects what Bakker calls an Escalation in quality.¹⁰⁴ Once one firm demonstrates the returns to scale-and-scope investment, competitors must match its sunk costs in sets, stars, and marketing to remain visible. *Tomiris* (2019) epitomised the moment. Budgeted at roughly \$6,5 million (times the median local feature), it leveraged large-scale battle sets and laid the groundwork for future period epics, lowering entry barriers for similar productions as its costumes, props, and set pieces are now available for hire from

¹⁰² S. Abraham Ravid, 'The Economics of Film Financing: An Introduction', in *Handbook of State Aid for Film*, ed. Paul Clemens Murschetz, Roland Teichmann, and Matthias Karmasin, Media Business and Innovation (Cham: Springer International Publishing, 2018), 46, https://doi.org/10.1007/978-3-319-71716-6_3.

¹⁰³ Deloitte, 'The Future of the Creative Economy' (Deloitte, June 2021), 16, <https://www.scribd.com/document/519459416/Deloitte-Uk-Future-Creative-Economy-Report-Final>.

¹⁰⁴ Gerben Bakker, ed., 'The Quality Race', in *Entertainment Industrialised: The Emergence of the International Film Industry, 1890–1940*, Cambridge Studies in Economic History - Second Series (Cambridge: Cambridge University Press, 2008), 186, <https://doi.org/10.1017/CBO9780511497322.009>.

Kazakhfilm. The state studio's aborted 2015 privatisation shows why such escalation still needed a vertically integrated champion: without assured finance, marketing clout, and managerial depth, high-budget spectacle stalls. Thus, Kazakhfilm's retention as a public asset could be seen as a strategic hedge against the market's new "bigger-or-irrelevant" game. Since 2019, Kazakhfilm has undergone significant institutional change. Formerly the sole conduit for state film funding, its activities were tightly circumscribed by the national cultural policy framework. However, following the establishment of the SCSNC, Kazakhfilm now receives only around 30% of the state cinema budget. While this limits its ability to fully finance projects, it frees the studio from ideological constraints, allowing it to co-produce a broader slate of commercially oriented films.

4.3 Creativity outstretched

A recurring debate evident both in scholarly literature and interviews with professionals concerns the talent pool. For example, Kazakhfilm's current president, Omarov, condemns the "solo auteur" mentality. Essentially, the term refers to directors who insist on writing, producing and acting in their pictures, often without the craft skills those functions demand. The reasoning for this is rooted in the inherent structure of private studios. Entities like Nurtas Production or Satayfilm are typically capitalised on a single individual's celebrity. Thus, shaving payroll by collapsing roles is an obvious survival strategy. The talent pipeline shows the same skew. UNESCO found extremely few female directors or screenwriters in recent graduating cohorts, although the number of female producers has risen.¹⁰⁵ Moreover, no Kazakh university offers dedicated producer training, while academic mobility is limited to sporadic Erasmus exchanges. Without structured career paths, many creatives remain self-taught, reinforcing the auteur-centric model and encouraging outward migration of those seeking specialised skills.

However, no figure illustrates the risks of the one-man-band model better than Nurtas Adambay, actor, screenwriter, director, and producer of the Kelinka Sabina franchise. While the films remain some of post-independence Kazakhstan's highest earners, Adambay has repeatedly found himself in reputational crises: a 2024 administrative fine for unauthorised Qur'an quotations on Instagram, public apologies to the presidents of Kazakhstan and Russia for earlier comments, and a pending 2024-2025 court case over

¹⁰⁵ UNESCO Office in Almaty, 'Film Industries in Central Asia – A View Today and Towards the Future', 18–19.

alleged violations of religious-speech laws.¹⁰⁶ Critics point to the hypocrisy of Kelinka Sabina's cross-dressing humour, scripted, directed and performed by Adambay himself, as an example of how individuals can collide with nationalist swings that favour family values. This case might reflect a broader industry trend: as public discourse shifts toward religious traditionalism (evident in recent box-office hits like the horror film *Dästür* and Kyrgyzstan's *Paradise Under Mothers' Feet*). The auteur-centric model forces creators like Adambay into reactive self-censorship or public contrition to align with moral norms. Simultaneously, this stifles intellectual ambition in Kazakh cinema, as noted by critic Karim Kadyrbaev, who observes that Central Asian filmmakers increasingly prioritise "shukir-shukir" (gratitude) and "inshallah" (God willing) narratives over complex, intellect-driven stories, being at a stark contrast to Western cinema's celebration of antiheroes like Walter White or Tony Stark.¹⁰⁷ In this climate, auteurs become both products and casualties of an industry that conflates commercial survival with ideological conformity, leaving little room for critical or subversive storytelling.

Overall, for many self-made auteurs, the market prizes the personal brand over the screenplay. Comedies and social melodramas that fit the public discourse dominate the box office, while technically demanding genres like sci-fi and animation struggle for scripts and crew, thus, being more relevant for directors leaning towards 'team-playing'.

4.4 Co-productions and distribution

4.4.1 A hard-to-break dependency

Looking at the Kazakh movie industry in retrospect, we might conclude that the end product is ultimately targeting the home audience. However, the newly independent state, just entering the international market, had different ambitions. For example, Beumers believed that to ensure commercial profitability, Kazakhstan, due to its relatively small size, is not enough, and it is essential to appeal to the Russian market as well.¹⁰⁸ Although we have witnessed a significant positive discourse shift from producing a likely profitable blockbuster

¹⁰⁶ Eldar Nurullin, 'Nurtas Adambay to stand trial in Astana. [Нуртас Адамбай предстанет перед судом в Астане]', Tengri News, 31 July 2024, https://tengrinews.kz/kazakhstan_news/nurtas-adambay-predstanet-pered-sudom-v-astane-543250/; Diana Bizhanova, 'Showman Nurtas Adambay Fined for Quoting Quran Verses on Social Media', Qazinform.com, 17:26:00+00:00, <https://qazinform.com/news/showman-nurtas-adambay-fined-for-quoting-quran-verses-on-social-media-a724a7>.

¹⁰⁷ Karim Kadyrbaev, 'Where is Kazakhstani cinema going? Closer to religion, away from intellect. [Куда идёт казахстанское кино? Ближе к религии, подальше от интеллекта]', ORDA.kz, 15 April 2025, <https://orda.kz/kuda-idet-kazahstanskoe-kino-blizhe-k-religii-podalshe-ot-intellekta-400488/>.

¹⁰⁸ Beumers, 'Waves, Old and New, in Kazakh Cinema', 209.

to investing in the art cinema mainly for festival entries. It is hard to deny that Early attempts to integrate into the international film market relied heavily on foreign financing and co-productions, epitomised by high-profile projects such as *Nomad* (2005), backed by American producers, and *Mongol* (2007), a Kazakh-Russian-German collaboration. By the late 2000s, Russian film distributors had cemented their dominance in Kazakhstan's exhibition sector, acting as gatekeepers for both Hollywood blockbusters and Russian releases.

This arrangement reached a crisis point in 2008, when an investigative report exposed that Kazakhfilm's leadership had transferred distribution rights to ten foundational Kazakh films—including *Igla* (*The Needle*, 1988), a cult classic of the perestroika era to Russia's Central Partnership for a mere \$100,000.¹⁰⁹ The deal, brokered through an opaque intermediary, granted the Moscow-based distributor exclusive control over the films until 2019, even though a single broadcast of a major film on Russian television typically commanded comparable fees. Current exhibition data confirm how concentration reproduces that dependency. As of mid-2019, the Kinopark/Starcinema chain alone controlled 21.7% of all screens (68 halls in ten multiplexes), while the ten largest operators together held over 70% of capacity.¹¹⁰ Crucially, Kazakhstan has still not implemented the legally mandated Unified Automated Information System (UAIS), so box-office data remain opaque and susceptible to under-reporting. Those are the conditions that strengthen distributors' leverage over producers and the SCNSC alike. The outcry from filmmakers and cultural policymakers was immediate, framing the scandal as a cautionary tale of post-Soviet cultural privatisation: in the absence of protective regulations, national heritage could be commodified and relinquished at exploitative rates. The backlash spurred two key developments: (i) heightened scrutiny over intellectual property agreements, and (ii) renewed advocacy for state intervention to safeguard domestic cinema. Crucially, the incident underscored the urgent need for Kazakhstan to cultivate its distribution infrastructure. This lesson could be viewed as the foundation for the rise of local streaming platforms discussed in the previous section.

4.4.2 Glocalisation turn

In the 2010s and 2020s, Kazakh producers increasingly adopted a strategy of glocalisation, i.e. adapting internationally proven formats for local audiences to mitigate

¹⁰⁹ Viktor Burdin, '20 years on the Needle [20 лет на "Игле"]', *Время*, accessed 6 May 2025, <https://time.kz/news/archive/2008/07/12/5687>.

¹¹⁰ UNESCO Office in Almaty, 'Film Industries in Central Asia – A View Today and Towards the Future', 17.

financial risk while asserting creative autonomy. A paradigmatic case is *Malai* (2025), the Kazakh-language remake of *Kholop*, Russia's highest-grossing comedy franchise (total box office: \$120 million).¹¹¹ Produced under license by Uni-Q Media Group (Unico Production), *Malai* retained the original's narrative framework but transposed its humour and social commentary into a distinctly Kazakh context, with dialogue fully localised and cultural references tailored to domestic sensibilities. Director Yernar Nurgaliyev and lead actor Askar Ilyasov reimagined the protagonist as a contemporary Kazakh everyman, leveraging the film's regional appeal to secure the #1 box-office position for multiple weeks. As Unico's general producer Anara Zhunusova noted, the project exemplified a "third way" between outright co-productions and wholly original content: by licensing a successful foreign IP, Kazakh filmmakers could leverage pre-existing demand while ensuring creative control over localisation.¹¹² This model, now proliferating across genres, reflects a broader institutional shift toward asymmetric partnerships, wherein Kazakhstan engages with global media flows not as a subordinate player but as a negotiator of terms.

4.5 Digital sovereignty

The most transformative development has occurred in the field of domestic over-the-top (OTT) platforms. Ultimately, their emergence has disrupted Kazakhstan's historically Russia-dependent distribution channels. UNESCO links that market imbalance to a long-standing dependence on Russian release calendars and booking software. Until the arrival of OTT platforms, domestic producers had little bargaining power over showtimes or revenue shares. The growth of Kazakh-language streamers, therefore, represents, in policy terms, a bid for data sovereignty every bit as important as the 30% cash-rebate scheme.¹¹³ Spearheaded by ventures like Unico Play and Salem TV+ (in partnership with Kazakhtelecom), these services address two systemic constraints: (i) the limited reach of physical cinemas outside urban centres, and (ii) the reliance on foreign intermediaries for audience access.

¹¹¹ Zhankeldi Omiraliyev, 'The movie "Malay": how does the Kazakh "Kholop" differ from the Russian one? [Фильм «Малай»: чем казахский «Холоп» отличается от русского?]', 27 March 2025, <https://orda.kz/film-malaj-chem-kazahskij-holop-otlichaetsja-ot-russkogo-399673/>.

¹¹² Eugenia Skalei, 'Adaptation of Comedy "Kholop" to Be Released in Kazakhstan - Malay. [На Казахстанские Экраны Выйдет Адаптация Комедии "Холоп" – "Малай"]', Cronos Central Asia, 01 2025, <https://cronos.asia/no-tie/na-kazahstanskije-ekrany-vyjdet-adaptaciya-komedii-holop-malaj>.

¹¹³ Aidana Yergaliyeva, 'Kazakhstan's Law on Cinema to Increase Country's Attractiveness with Support Centre, 30-Percent Rebate, Unified Cinema Ticket', *The Astana Times* (blog), 8 January 2020, <https://astanatimes.com/2020/01/kazahstans-law-on-cinema-to-increase-countrys-attractiveness-with-support-centre-30-percent-rebate-unified-cinema-ticket/>.

The capital-intensive vanguard is Unico Play, launched in 2024 under Uni-Q Group. Financed by Freedom Holding billionaire Timur Turlov, the venture has a \$100 million war-chest and a three-year plan to invest more than 50 billion tenge (ca. \$110 million) in Kazakh-language features and series.¹¹⁴ Uni-Q integrates production (Unico Studio), rights sales (Unico Rights) and direct-to-consumer streaming, with a target of one million monthly active users by 2026 and four streaming blockbusters a year. The group operates as an integrated production-distribution ecosystem, commissioning original films and series while leveraging its streaming infrastructure to bypass traditional exhibition bottlenecks. CEO Zhunusova has framed such platforms as “cultural catalysts,” enabling niche genres, regional storytelling, and experimental formats that multiplex historically marginalised.

A contrasting, creator-led model is offered by Salem TV+, the streaming arm of Salem Social Media, founded by ex-banker Aset Sarsenov and producer Rustam Yusupov. Salem cut its teeth on YouTube, then bundled its catalogue with Kazakhtelecom’s TV+ app to reach national audiences. The company’s task now is framed to turn dozens of successes into hundreds by coupling low-overhead production with algorithm-driven promotion with the discussed possibility to collaborate with Kazakhfilm.¹¹⁵ Salem Entertainment’s alliance with Kazakhtelecom has demonstrated the scalability of digital distribution, amassing 600,000 subscribers within two years by bundling film content with telecom services.¹¹⁶ Salem’s claim to cultural clout rests on the promotion of content in the Kazakh language and a slate of breakout web dramas. For instance, 5:32 is a 12-episode crime thriller in which a retired detective reopens a 1990s serial-killer case. Another example is Serjan Bratan. The web series imagines a 1990s racketeer waking from a 23-year coma into modern Almaty; it won Best Web Series at Kazakhstan’s Nauryz TV Awards and later took the Episodes Grand Jury Prize at Slamdance.¹¹⁷

¹¹⁴ Zhanel Zhazetova, ‘Timur Turlov Invests in New Media Group Aiming to Make Blockbusters’, Kursiv Media Kazakhstan, 13 September 2024, <https://kz.kursiv.media/en/2024-09-13/timur-turlov-invests-in-new-media-group-aiming-to-make-blockbusters/>.

¹¹⁵ Viktor Burdin, ‘Head of Salem Social Media: 80% of our content is in Kazakh language. [Глава Salem Social Media: 80% контента мы делаем на казахском языке]’, Forbes.kz, 26 November 2020, https://forbes.kz/articles/glava_salem_social_media_80_kontenta_myi_delaem_na_kazahskom_yazyike.

¹¹⁶ Abuova, ‘Kazakhstan’s Film Industry’.

¹¹⁷ Aruzhan Ualikhanova, ‘Kazakhstan Holds First National Awards to Recognize Excellence in TV Series Industry’, *The Astana Times* (blog), 3 April 2023, <https://astanatimes.com/2023/04/kazakhstan-holds-first-national-awards-to-recognize-excellence-in-tv-series-industry/>; ‘SLAMDANCE ’25 WINNERS – Slamdance’, accessed 10 June 2025, <https://slamdance.com/slamdance-25-winners/>.

The state has tacitly endorsed this shift through policies like the 2024 Digital Content Rebate, which incentivises foreign producers to partner with Kazakh platforms. Even global giants like Netflix have taken note, acquiring Kazakh documentaries (*The Road to Mother*, 2016) and exploring further collaborations.¹¹⁸ The policy underscores how OTT services now shape not just distribution but the entire value chain. Uni-Q brings fintech-style scale and data analytics; Salem leverages grassroots virality and linguistic authenticity. Both models abandon the old Soviet single-channel system (*Soiuzkinoprokat*) in favour of platform-centred control of production, rights and audience data, and content in the national language, making digital distribution the key institutional lever for Kazakhstan's narrative sovereignty.

4.6 Conclusion

Kazakh cinema's post-1991 story is neither a straight march from plan to market nor a simple triumph of private enterprise. It is the gradual construction of a hybrid system in which new actors invigorate the field while the state continually renegotiates its custodial role. Private studios, auteur-led outfits, web-native media companies, and OTT platforms have supplied the finance, formats and entrepreneurial energy that Soviet structures could not, driving an unprecedented surge in output and genre diversity. Yet, each growth spurt has also exposed the limits of unfettered market logic: whether in the 1990s collapse of early independents, the public outcry that halted *Kazakhfilm*'s privatisation, or today's reliance on state grants, cash rebates, and heritage protections to underwrite high-budget spectacle.

The result is an industry that operates on a double logic: commercially minded producers prove domestic demand for Kazakh-language entertainment, while the state preserves symbolic assets, reins in foreign leverage and keeps open the option of strategic intervention. This push-and-pull has produced a distinct institutional architecture: vertically integrated public-private hybrids coexist with nimble niche players. Each element can tap multiple revenue streams from cinema tickets to telco-bundled streaming subscriptions, previously unavailable under Soviet distribution.

These fresh frameworks have not erased the Soviet legacy so much as repurposed it. The backlot, guild system and prestige of *Kazakhfilm* continue to serve as industrial scaffolding,

¹¹⁸ Song, 'Can Kazakhstan's Film Industry Succeed at Home and Abroad?'

but they now host co-productions, franchise comedies, and ethnographic horror films that speak to both global circuits and local identities. Likewise, the Soviet notion of cinema as a strategic cultural good survives, only now reframed through twenty-first-century policy tools such as digital-content rebates and data-sovereignty clauses. Significantly, the latest acting director of Kazakhfilm (appointed in August 2024) might be the first instance of a studio's president coming from a business rather than a film/theatre background. It marks a managerial turn towards profitability metrics and corporate governance, hinting that the venerable studio may be preparing for a more market-oriented future. Perhaps, at last, a credible path to partial or full privatisation.

In sum, the rise of new institutional actors has transformed Kazakhstan's film sector from a state monopoly into a plural creative economy. Creative entrepreneurship provides the dynamism, the state supplies stabilisers, and the continual tension between the two has forged a uniquely Kazakh model: globally connected yet nationally rooted, market-responsive yet politically safeguarded. It is this negotiated hybridity, rather than a clean break with the past, that best answers the question of how new actors and frameworks have reshaped Kazakh cinema since independence.

Chapter 5. Collaborative Networks

Building on the institutional genealogy reconstructed in Chapter 3 and the political economy of incentives mapped in Chapter 4, this chapter shifts analytical scale from organisations and policies to the relational fabric through which films are made. The organising premise is that collaboration patterns, i.e. who writes for whom, how often, and in what configurations, constitute a historically contingent arena in which Soviet-era habits are either maintained, re-purposed, or abandoned under the pressure of post-1991 reforms. Social networks serve as an empirical reflection of the broader institutional transformations and market forces that have shaped the industry since Kazakhstan's independence in 1991. To capture this evolving terrain, this paper models every credited partnership between a director and a screenwriter as a tie in a weighted bipartite network and then tracks how the resulting structure changes across three decades (1991-2002, 2003-2013, 2014-2024). This chapter addresses the third sub-question outlined in the thesis: how have the collaborative networks evolved since 1991, and how do these relational structures reflect the institutional dynamics in Kazakh cinema's creative ecosystem? Answering this question enables the test of the concept of institutional path plasticity that guided analysis in Chapters 3-4. Suppose rules can be layered, stretched or converted without severing all links to the past. In that case, it is expected to see parallel signatures of continuity-in-change in the day-to-day pairing of directors and writers.

5.1 Applying social network analysis

Before any findings are discussed, this section explains what the ensuing visualisations and analyses mean. The data were derived from the IMDb database, complemented by manual verification and cleaning to ensure accuracy in director and writer attributions. A total of 638 full-length Kazakh films released between 1991 and 2024 were processed. Each film's metadata included its year of release, director(s), writer(s), and basic thematic information. Cases with missing or ambiguous authorship data were excluded to preserve analytical clarity.

From this comprehensive dataset, edge lists were constructed to represent every credited partnership between a director and a screenwriter. The resulting network is fundamentally bipartite, meaning it comprises two distinct sets of nodes — directors and writers — with connections (edges) existing exclusively between these two sets, never within the same set.

For instance, directors do not link directly to other directors, nor do writers link directly to other writers. Directors are visually represented by dark teal nodes and are prefixed with "D_" (e.g., D_A.Karpykov), while writers are depicted as orange nodes and carry a "W_" prefix (e.g., W_Apromov).

A critical feature of this analysis is the use of weighted edges. When the same director-writer pair collaborates on multiple films, the line connecting them is visually thickened. This visual convention intuitively conveys the strength and endurance of a collaborative relationship, effectively distinguishing one-off projects from sustained partnerships. The bipartite structure itself highlights the fundamental division of labour and the inherent interdependency between these creative roles, allowing for a focused analysis of how this core relational dynamic evolves under varying institutional pressures.

The last metric used in the following analysis is centrality measures that enable tracing of how certain filmmakers rose to prominence or faded to the periphery, and what these patterns say about the broader creative field. There are four types of centrality. The degree centrality of a director (number of unique writer collaborators) indicates how widely they worked across the industry. Betweenness centrality highlights those who broker connections between otherwise separate groups. Closeness centrality reflects how near a director is to all others in the network (a measure of integration). Eigenvector centrality points to those connected to other well-connected figures (a prestige or influence indicator). Using corrected centrality data for each period, this chapter interprets the top-ranked directors and the outliers, linking these network positions to the institutional transformation of Kazakh cinema. Throughout the discussion, references to visual network projections (weighted bipartite graphs of director–writer ties and director clustering graphs) support the claims about changes in network density, fragmentation, recurring ties, and emerging hubs.

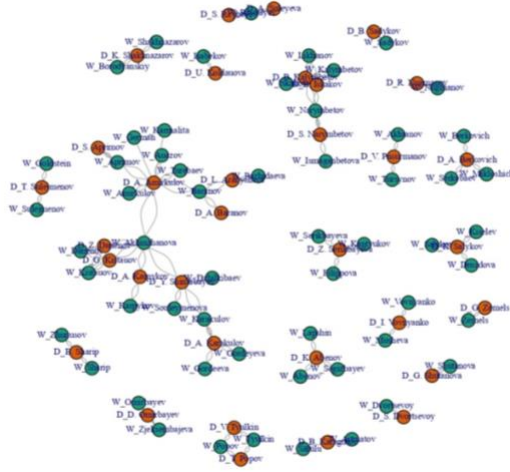
5.2 Social network evolution

5.2.1 Expansion, densification, and path contraction

Kazakh cinema's collaboration web has expanded from a loose scatter of dyads in the early 1990s to an almost fully connected creative marketplace today. Thus, before dissecting each time slice, it is helpful to establish what the collaboration graphs reveal about the industry as a whole across the 34-year window. Two short subsections capture that arc: first, the macroevolution of size and density, then the headline shifts in who sits at the centre.

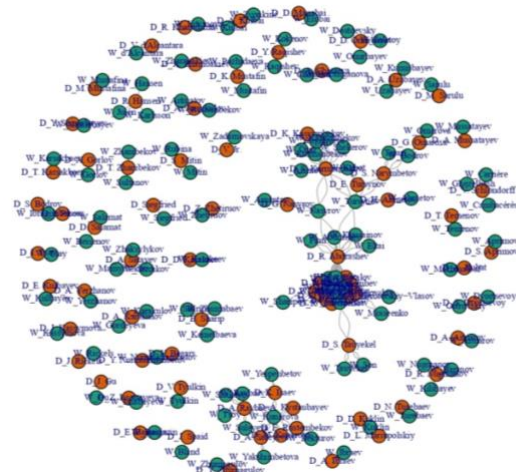
Figures 5.1–5.3 (bipartite networks) serve as the empirical backbone for the discussion below.

Figure 5.1 *Bipartite graph of Kazakh cinema Directors and Screenwriters, 1991-2002*



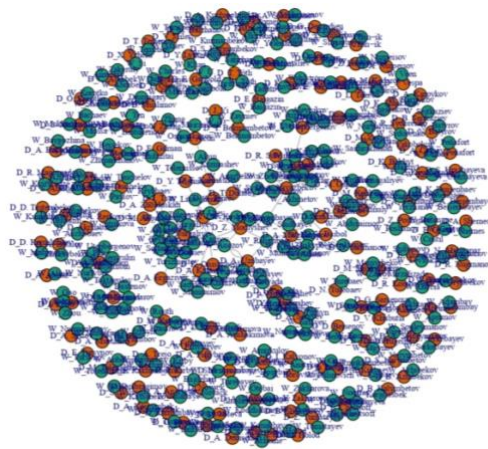
Source: By the author based on the IMDB non-commercial dataset

Figure 5.2 *Bipartite graph of Kazakh cinema Directors and Screenwriters, 2003-2013*



Source: By the author based on the IMDB non-commercial dataset

Figure 5.3 *Bipartite graph of Kazakh cinema Directors and Screenwriters, 2014-2024*



Source: By the author based on the IMDB non-commercial dataset

The industry experienced both extensive and intensive growth. During the initial post-independence period, the industry operated with minimal connectivity, evidenced by only 76 active creators collaborating on 47 feature films. The absolute number of credited directors and writers trebled between 1991-2002 and 2014-2024, while the count of director-writer ties increased almost eightfold. This growth was not merely additive. Average degree rose from 4.3 in the first period to 6.7 in the third, and the median geodesic distance shrank from > 4 hops to ≈ 2 . In other words, in the early 1990s, a typical practitioner was directly connected to only about four colleagues, but by the 2020s, that figure is almost seven. Practically, every

new project now lands an individual in a wider first-hand circle of peers, potentially hinting at the development of roles like script-doctors, co-writers, and assistant directors. A denser immediate neighbourhood speeds the spread of working norms and funding gossip, broadens reputational reach, and gives practitioners more ready-made alternatives if a partnership sours. In essence, two randomly chosen professionals once needed a chain of at least four intermediaries to exchange information. Today, a single ‘warm introduction’ usually suffices. Shorter paths translate into faster diffusion of technical tricks or commissioning news, lower entry barriers, and quicker cross-pollination of stylistic trends between genres. Consequently, information, norms, and job leads can now traverse the professional community roughly twice as fast as during the immediate post-Soviet decade. Such shortening of paths is typical of creative fields that transition from project-based craft production to scalable, market-oriented production systems. These findings reflect a broader pattern observed by Uzzi and Spiro, who argue that in creative fields, highly interconnected and cohesive small-world networks enhance the diffusion of ideas, practices, and opportunities by connecting professionals across separate clusters.¹¹⁹

5.2.2 Shifting brokerage power and the auteur paradox

A closer inspection of the betweenness-centrality rankings (how many paths cross through the node) reveals a three-stage oscillation in who holds the keys to Kazakhstan’s collaborative ecosystem. In the earliest window (1991-2002), the foremost broker is a writer, W_Akhinzhanova ($\beta = 81.1$), marginally ahead of the most connected director, D_A. Amirkulov ($\beta = 17$). During the consolidation decade (2003-2013), that hierarchy briefly flips: D_R. Abdrashev ascends to $\beta = 70$, overtaking W_Tursynov ($\beta = 185$) in relative terms because several other directors cluster around him, while writers’ scores remain comparatively moderate. By the contemporary era (2014-2024), the pendulum swings back decisively. A small cadre of highly influential writers, such as W_Utev ($\beta = 1,210.8$) and W_Koyanbayev ($\beta = 934$), amass brokerage scores an order of magnitude higher than any director, even though the highest-scoring director, D_Z. Momyshev almost doubles his own earlier figure ($\beta = 231$).

What drives this non-linear trajectory? The answer lies in the interaction between two structural logics that run through the industry: the rise of auteur practice and the simultaneous

¹¹⁹ Brian Uzzi and Jarrett Spiro, ‘Collaboration and Creativity: The Small World Problem’, *American Journal of Sociology* 111, no. 2 (September 2005): 450, <https://doi.org/10.1086/432782>.

professionalisation of writing. The auteur critique, outlined in Chapter 4, describes directors who behave as quasi self-contained production units, one-man bands, relying on minimal, tightly managed collaboration. Empirically, this shows up as a proliferation of isolated director–writer dyads in Periods 2 and 3. There are around 53 instances of the same person responsible for both roles (i.e. W_Mussatayev ↔ D_Mussatayev). Thus, these elements operate entirely on the periphery of the giant component, insulated from the wider fabric of creative exchange. In Period 1, by contrast, such isolates were rarer and typically consisted of an additional writer (i.e. isolated element of D_Suleimenov being connected to W_Suleimenov but also W_Goldstein), reflecting the ad-hoc improvisation of the immediate post-Soviet moment rather than deliberate auteurism.

The interaction of individual agency and institutional settings also emerges clearly. The proliferation of private studios in the 2000s offered directors the autonomy to pursue auteur paths, yet simultaneously created a demand for writers capable of servicing several branded one-man outfits. Streaming commissions in the 2010s intensified that need by compressing development timetables. Writers who could deliver rapid rewrites and genre-hybrid scripts became the new bottleneck, and their betweenness centrality soared accordingly. Thus, institutional changes, such as private capital or streaming timetables, did not erode auteur tendencies but accentuated the strategic value of writers who could navigate between them. The structural power of the writer, therefore, derives both from degree (how many direct ties they have) and from strategic position (how essential they are to the fabric of connectivity). In practical terms, these writers perform four critical functions:

First, translational brokerage. They convert genre idioms and production dialects across auteur enclaves. Second, risk pooling. By working on five or six simultaneous projects, a writer amortises the failure risk of auteur ventures that might never secure wide distribution, thereby stabilising personal income and smoothing production calendars for studios. Third, labour-market signalling. Because they straddle many dyads, writers act as informal referees. A positive or negative assessment from them travels swiftly through the network, disciplining quality and professional conduct. Fourth, cohesion insurance. Should auteur dyads implode, a not uncommon outcome given creative egos, the writer's alternative pathways allow cast and crew to migrate rapidly to new projects, minimising downtime.

In summary, the evolution from writer-led brokerage (Period 1), to director prominence (Period 2), and back to an even stronger writer brokerage (Period 3) underscores a dynamic equilibrium rather than a zero-sum contest. Auteur practice persists, yet the network adapts by elevating writers who bridge the resulting gaps. Firstly, this perspective challenges any simplistic account of directorial dominance. Secondly, it highlights the nuanced, increasingly critical role of writers in sustaining cohesion, fostering innovation and mediating risk within a professionalising Kazakh film industry.

5.2.3 Quantitative metric shifts

Table 5.1 pulls together the headline figures for the three periods and helps to pin down, in numbers, the more descriptive patterns discussed earlier. The first point that stands out is the change in degree. Although the network reflects having more links over time, it is not true for every node. In the 1990s, the most collaborative individual could claim thirteen direct collaborators, and the average practitioner knew just over four people first-hand. During the following decade, those numbers jumped: the record holder reached twenty-four direct links, and the average climbed to a little over eight. A larger labour pool encouraged wider recruitment. In the last decade, the maximum degree remains at twenty-four, yet the average slips back to 6.7. What this suggests is that streaming-era growth pulled many newcomers into the field faster than it created additional ties for every single entrant. The network is still denser than it was at the turn of the millennium, but the extra connections are now distributed unevenly rather than across the board.

Table 5.1 *Cross-Period Shifts in Key Network Metrics (1991-2024)*

Metric	Period 1	Period 2	Period 3
Max Degree	13	24	24
Max Betweenness	81.14	185	1210.75
Max Closeness	0.0625	0.5	0.05
Max Eigenvector	1.0	1.0	1.0
Avg. Degree	4.3	8.1	6.7

Source: Calculated by the author based on the IMDB non-commercial dataset

A far more dramatic story emerges when betweenness centrality is examined. In the first window, the busiest bridge between otherwise unconnected teams held a score of eighty-one; in the second window, that figure more than doubled to one hundred and eighty-five. Neither of those increases prepares one for the leap recorded in the contemporary period, where the top scorer registers a value above twelve hundred. Betweenness measures how often someone sits on the shortest route linking all other pairs. Such an extraordinary rise, therefore, means

that a very small handful of writers have become the indispensable conduits through which ideas, scripts and reputational gossip move. If any one of them were to withdraw, large sections of the industry would find it harder to connect efficiently. The field has gained speed because messages have fewer hurdles to clear, but that speed now depends on single points of failure.

Closeness centrality, which asks how quickly an individual can reach the whole network, shows a different rhythm. The highest score appears in the middle period, when one writer sat on average within a single hop of almost everyone else who mattered. In the 2010s and early 2020s, the value fell back, not because paths became longer but because the audience to be reached grows so much larger that no one person can maintain the same blanket coverage. Reachability is still good; it is simply more evenly shared among several key figures.

Eigenvector centrality behaves in a curiously stubborn way. Across all three periods, it displays an almost binary distribution. A microscopic elite consistently registers scores close to one, while the vast majority languish near zero. In plain terms, gaining more contacts is not the same as gaining influence. Prestige remains locked inside a small club whose membership changes only slowly, even as hundreds of new faces arrive on set. The pattern recalls the Soviet star system and signals that hierarchy has proved more durable than many of the formal institutions that once underpinned it.

Putting the metrics together, the modern network proves both impressively efficient and worryingly fragile. Ideas travel faster than ever because the average journey from one practitioner to another has shrunk to roughly two introductions. Yet, many of those journeys funnel through the same overworked scriptwriters. A dispute, illness or scheduling clash affecting any one of them could stall multiple projects. For policy-makers and studio executives, the lesson is clear: if the industry wishes to stay nimble without courting systemic risk, it needs to expand the pool of mid-level writers who can share brokerage duties and, in time, dilute the concentration of influence that currently clings to a few star names.

5.3 Community detection

Figures 5.4 - 5.6 that accompany this chapter are one-mode projections of the original bipartite dataset. The resulting graph contains only directors where two nodes are connected if they have worked with at least one common screenwriter. One-mode views translate the

many-to-many relations of a bipartite matrix into the form of professional peer groups, making centrality scores and community boundaries easier to grasp. Community structure is identified with the Louvain modularity-optimisation algorithm applied to the weighted networks. The resulting partitions are displayed by colouring each node according to its community membership. The palette itself carries no substantive meaning beyond marking those clusters. Node size is mapped to weighted degree (total collaborations) so that the most collaborative individuals stand out visually. Edge weights in the projections equal the number of distinct collaborations, so repeated partnerships appear as thicker links. Layout stability is ensured by fixing a random seed before calling the Fruchterman-Reingold algorithm, which places heavily connected vertices nearer to one another. To keep the drawings legible, only vertices whose weighted degree exceeds a small threshold are labelled in the plotting routine. Every participant, therefore, appears as a point, but peripheral figures with just one or two credits remain unnamed on the diagram. This trade-off strikes a balance between completeness and readability, allowing the discussion to focus on the clusters and hubs that shaped each decade rather than on dozens of single-appearance outliers.

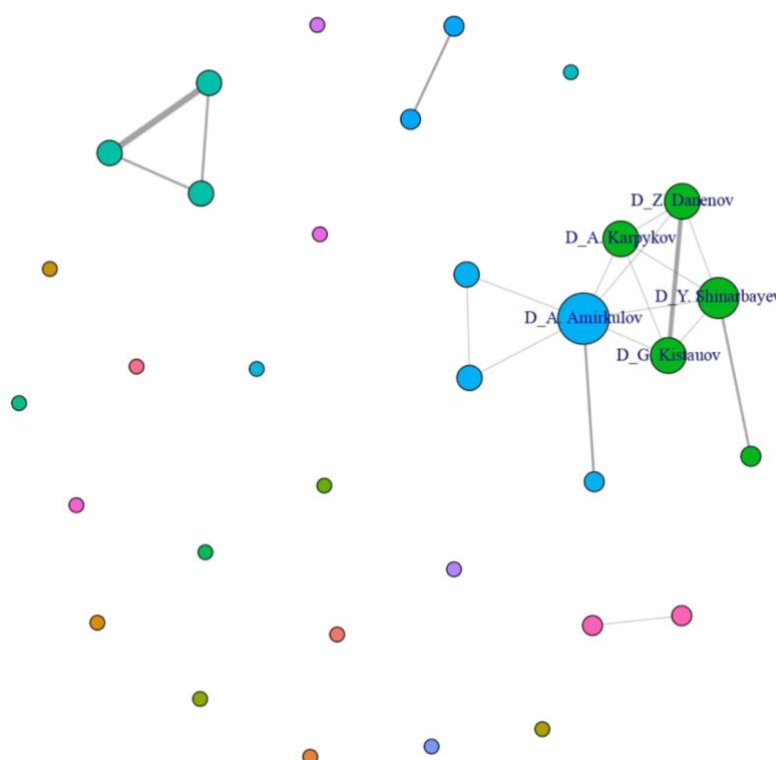
5.3.1 Retention in early independence

The three-period breakdown of the bipartite network already hinted at a dramatic surge in creative manpower, but converting the data to one-mode projections clarifies how that headcount translated into cohesion, hierarchy and churn. In the director layer (Figure 5.4), the growth curve is steepest. Between 1991 and 2002, five modest clusters shared the field. The largest community tallied only five members. Notably, all five labelled directors are alumni of Moscow's All-Russian State University of Cinematography (VGIK), whose schooling under Sergei Soloviev forged tight interpersonal ties.¹²⁰ Literature notes their shared aesthetic handheld cameras, nocturnal cityscapes, and non-professional casts.

Overall, period 1 of the network analysis isolates two well-defined communities. The Green cluster brings together four filmmakers whose links predate independence and crystallised during the late-Soviet Kazakh New Wave. The Blue cluster, by contrast, revolves around a single, highly connected auteur, Amirkulov, whose epic projects positioned him as a hub bridging otherwise separate creative circles.

¹²⁰ Michael Rouland, Gulnara Abikeyeva, and Birgit Beumers, eds., *Cinema in Central Asia: Rewriting Cultural Histories*, The Russian and Soviet Cinema Series (London ; New York: I.B. Tauris, 2013), 21.

Figure 5.4 *Unsupervised Clustering of Kazakh cinema Directors, 1991-2002*



Source: By the author based on the IMDB non-commercial dataset

The Green cluster is comprised of Danenov, Kaprykov, Kistauov, and Shinarbayev. The first explanation of its cohesion is institutional due to shared training in Moscow that encouraged formal experimentation and mutual crew-sharing once they returned to Almaty. Ermek Shinarbaev soon emerged as the group's senior figure. Films such as *Revenge* (1989) and *Tender Heart* (1994) paired philosophical depth with bold narrative structures and quickly became touchstones for the younger directors.¹²¹ Abai Kaprykov's debut *Fish in Love* (1990) followed the same low-budget, auteur model and toured the festival circuit alongside Shinarbaev's work, reinforcing the impression of a shared aesthetic and a joint promotion strategy for national originality in the early 1990s.¹²² Another layer of clustering in the green community is explained by even closer personal collaboration. For example, animator-directors Zhaken Danenov and Gani Kistauov co-wrote and co-directed several shorts (*The Hunt*, 1988) and later the feature-length fantasy *Dragon's Island* (1997), creating a micro-

¹²¹ Gonul Donmez-Colin, *Cinemas of the Other : A Personal Journey with Film-Makers from Central Asia: 2nd Edition* (Bristol, United Kingdom: Intellect Books Ltd, 2012), 27, <http://ebookcentral.proquest.com/lib/gla/detail.action?docID=1069405>.

¹²² Abishev, Lumpov, and Smailova, 'The Phenomenon of Partisan Cinema', 64.

network of shared scripts, design teams, and voice actors within Kazakhfilm's animation unit. Thematically, the quartet foregrounds questions of identity and memory rather than the Blue cluster's state-sponsored heroic myth. All four directors preferred village locations or stylised steppe interiors, using sparse dialogue and long takes to suggest cultural dislocation. These shared stylistic decisions feed the modularity algorithm: films shot in the same locales with overlapping crews generate dense co-screening and citation links.

Standing apart in the Blue cluster is Ardak Amirkulov. His résumé is outwardly similar: VGIK graduate, New Wave alumnus. But the scale and ambition of his productions set him apart. *Otrar's Death* (1991) employed a cast of thousands and a pan-Asian production team, winning the FIPRESCI prize at Montréal and attracting international co-finance.¹²³ Because Amirkulov's epics required props, horse-wranglers, historians and multi-lingual casts, they linked otherwise separate departments inside Kazakhfilm and even drew on Russian, Uzbek and Chinese technicians.

In short, the Green cluster's tight cohesion reflects common training, reciprocal crew-sharing and a collective investment in minimalist, identity-seeking cinema, while the Blue cluster captures Amirkulov's role as a cosmopolitan super-connector whose historical epics stitched the entire filmmaking scene together.

5.3.2 Layering of the state-led boom

By the mid-2000s, state-led initiatives spurred a modest boom: Kazakhfilm produced its first big-budget post-independence epic, *Nomad* (2005) and followed with historical dramas like *Mongol* (2007) and *Myn Bala* (2011), reviving national history.¹²⁴ At the same time, filmmakers started diversifying content to contemporary themes. For example, crime drama *Racketeer* (2007) offered gritty social commentary and became a pop-cultural touchstone.¹²⁵ This mix of heritage epics and modern tales reflects an institutional continuity (the state studio still monopolising major productions) coupled with tentative innovation. Rather than a wholesale break from the Soviet-era model, the industry showed path plasticity:

¹²³ Beumers, 'Waves, Old and New, in Kazakh Cinema', 204.

¹²⁴ Isaacs, 'Nomads, Warriors and Bureaucrats', 404.

¹²⁵ Snezhana Baimukhanova et al., 'Methodology of Visual Techniques in the Cinematographic Art of Kazakhstan in 1930-2020', *Observatorio (OBS*)* 18, no. 3 (28 September 2024): 121, <https://doi.org/10.15847/obsOBS18320242489>.

it adapted within its established structures, allowing new genres and voices to emerge without completely abandoning the old path.

Within this context, creative coalitions are depicted in distinct clusters in Figure 5.5. The most prominent community was orange, consisting of 20 nodes. This community can be inspected in two smaller subgroups: smaller nodes in the lower part of the cluster (Tursynov, Narymbetov, Akhmetov, and Kurmanbekov) and more tightly connected, larger nodes in the upper part of the graph, bridged by Abdrashev. The bigger subgroup is formed around the state-commissioned anthology *Astana, I Love You* (2010–2012). Kazakhfilm convened ten directors, among them Rustem Abdrashev, Farkhat Sharipov, Aidar Batalov and Zhasulan Poshanov, under the artistic supervision of Russian filmmaker Egor Konchalovsky. Much as in the Soviet era, the national studio assembled a broad creative team. Yet, the goal had shifted from ideological propaganda to nation-branding for the new capital. Abdrashev, another VGIK graduate already acclaimed for *The Gift to Stalin* (2008) and multiple films dedicated to the formation of the first Kazakhstan president, Nazarbayev, emerged as the principal broker who linked senior talent with younger colleagues.¹²⁶ His credits positioned him as the network's most central node. This deliberately forged coalition demonstrates how state sponsorship could still orchestrate large-scale collaborations while experimenting with the globally popular City-anthology format.

Adjacent to the omnibus cluster was a looser circle of auteur directors, such as Ermek Tursunov, Gulshat Omarova, Satybaldy Narymbetov and others. They shared crews and mentors, but not the omnibus itself. Their festival-oriented features (Tursunov's *Kelin*, 2009; Omarova's *Schizo*, 2004) relied on modest budgets and occasional foreign co-producers rather than on Kazakhfilm's ensemble machinery.¹²⁷ Ties within this group stemmed from overlapping crews, union contacts and long-standing mentor–protégé relations (e.g. Narymbetov being a notable conduit from the Soviet generation). For instance, Tursynov was a screenwriter for Narymbetov's *Mustafa Shokai* (2008) and Abdrashev's *Patchwork Quilt* (2007) before his directorial debut in 2009. Although smaller, the cluster signals continuity in auteur-centred production: state funding was channelled project-by-project rather than

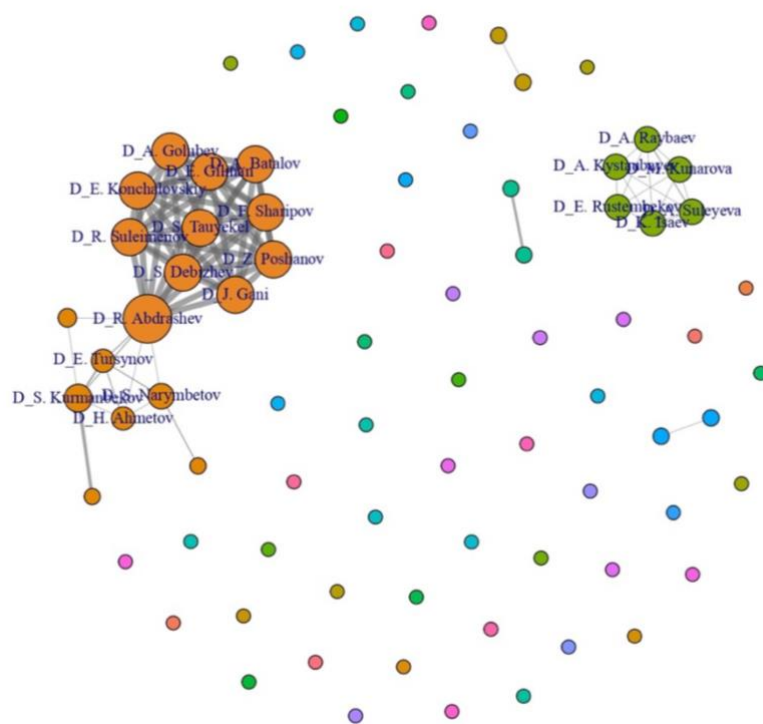
¹²⁶ Marlene Laruelle, “In Search of Kazakhness: The Televisual Landscape and Screening of Nation in Kazakhstan,” *Demokratizatsiya: The Journal of Post-Soviet Democratization* 23, No. 3: 321–340., *Demokratizatsiya The Journal of Post-Soviet Democratization* 23 (1 January 2015): 334.

¹²⁷ Rouland, Abikeyeva, and Beumers, *Cinema in Central Asia*, 172, 267.

through collective ventures, allowing art-house voices to persist alongside mainstream projects.

By 2013, Kazakh cinema displayed both consolidation and diversification: large ensemble productions and state-sponsored genre experiments co-existed with tightly knit art-house circles. The network remained centred on Kazakhfilm, yet its boundaries were increasingly permeable to private finance and international partnerships, confirming scholars' observations of a growing "pro-Western" orientation from 2007 onwards.¹²⁸ The coexistence of legacy structures and novel coalitions exemplifies path plasticity: innovation is pursued through the selective redeployment, rather than abandonment, of Soviet-derived institutions, laying the groundwork for the more market-oriented creative economy of the following decade.

Figure 5.5 *Unsupervised Clustering of Kazakh cinema Directors, 2003-2013*



Source: By the author based on the IMDB non-commercial dataset

A third green-coloured community gathered around directors and producers such as Raybayev, Suleyeva and Kunarova. Their collaborations on Kazakhfilm-backed titles include the fantasy adventure *The Sword of Victory* (2013) and the sci-fi action *Hunting the Phantom* (2014). These titles mark the studio's attempt to broaden its repertoire beyond prestige

¹²⁸ Amirbekova et al., 'New Model of Contemporary Kazakh Cinema – Artstream', 9.

historical epics. Centrality scores suggest an egalitarian structure with no single dominant broker, reflecting one-off project teams assembled to trial commercial genres. Yet repeated personnel links (e.g. shared cinematographers and producers) point to an embryonic community of genre specialists cultivated under state patronage. This again ties back to path plasticity: the national studio system created space for new types of films (an animated epic, a sci-fi thriller) while leveraging its existing network of creatives.¹²⁹

To sum up, across the clusters, Abdrashev epitomises the hybrid broker who channels Soviet-era institutional capital into new collaborative forms, while Narymbetov personifies the transmission of auteur values from the Soviet period into the present. Emerging directors such as Sharipov and Batalov benefited from the omnibus model as a stepping stone to later feature work. Strikingly, globally lauded auteurs, who have shaped the perception of modern Kazakh national cinema, Darezhan Omirbayev, Rashid Nugmanov, and Sergey Dvortsevov, remain peripheral because their micro-teams fall outside the credit-list thresholds used to build the domestic network.¹³⁰ Their absence underscores that festival prestige and local embeddedness do not necessarily coincide.

5.3.3 Conversion and diversification

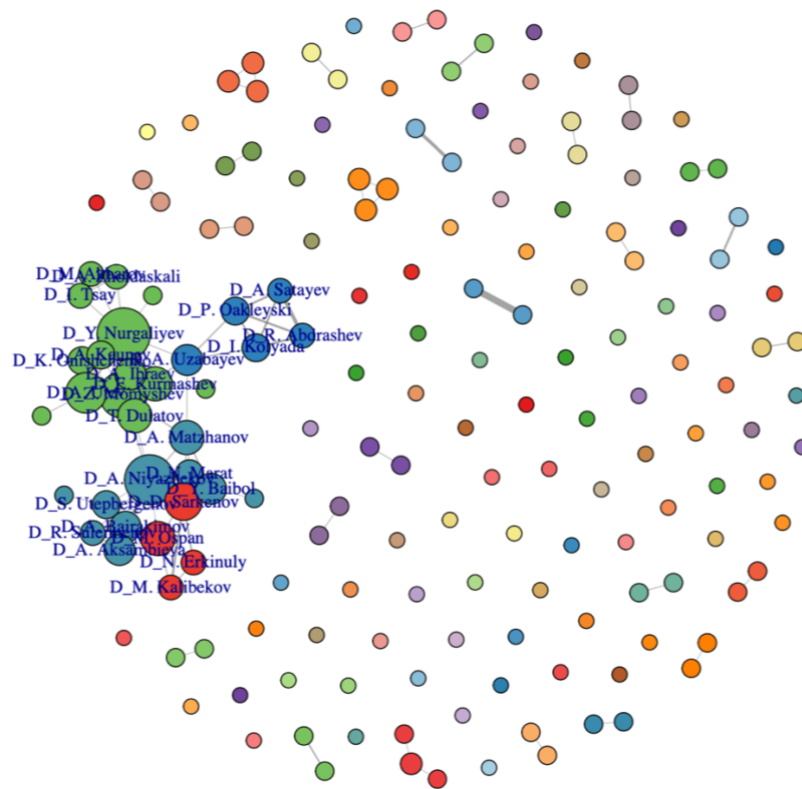
After 2013, Kazakh cinema moved from recovery to growth. Annual output rose sharply as Kazakhfilm modernised its facilities and private studios multiplied, while government policy recast film as a pillar of the Creative economy. A State Centre for National Cinema Support began funding debuts and mid-budget features, and a national creative-industries strategy (2021) formally positioned culture as an economic “blue ocean”, even if its share of GDP still hovered around 2.7 %.¹³¹ Greater capital and looser censorship drew new entrants. Yet, it produced a more segmented field. The 2014–2024 network illustrated in Figure 5.6 breaks into several discrete communities whose internal ties are strong but whose cross-links remain thin. An industry commentator captured the dilemma in 2024: despite having money and artistic vision, Kazakhstan lacks the cohesive structure required for scale.

¹²⁹ Simone Strambach, ‘Path Dependency and Path Plasticity: The Co-Evolution of Institutions and Innovation - the German Customized Business Software Industry’, *Handbook of Evolutionary Economic Geography*, 1 January 2010, 425.

¹³⁰ Isaacs and Polese, *Nation Building and Identity in the Post-Soviet Space*, 146.

¹³¹ Nagima Abuova, ‘Unlocking Kazakhstan’s Creative Economy: Investment Challenges and Opportunities’, *The Astana Times* (blog), 12 December 2024, <https://astanatimes.com/2024/12/unlocking-kazakhstans-creative-economy-investment-challenges-and-opportunities/>.

Figure 5.6 *Unsupervised Clustering of Kazakh cinema Directors, 2014-2024*



Source: By the author based on the IMDB non-commercial dataset

The blue cluster can be interpreted as a community of mainstream commercial cinema. Akan Satayev, Uzabayev, Abdrashev and their regular collaborators. These filmmakers collectively drove many of the period's high-profile releases revolving around big-budget dramas, thrillers, and biopics. Satayev's appointment as president of Kazakhfilm (2020-22) formalised the link between the state studio and profit-driven filmmaking. Under his tenure, the studio co-produced large-scale hits such as historical epic *Tomiris* (2019) with his own Sataifilm label. In the same vein, the previous decade's main broker, Abdrashev, preserved his weight in the network. In the latest decade, he continued his Kazakh Khanate history saga. Meanwhile, Uzabayev oscillated between box-office comedies and arthouse partnerships, making him the cluster's principal bridge to adjacent groups. Their shared pools of talents give the blue cluster a semi-corporate cohesion that underpins the industry's commercial spine.

The teal cluster gathers the younger directors, possibly representing the transition to the post-independence generation. Many in this group are part of the younger wave of directors and producers who started making films in the mid-2010s. For example, Bairakimov gained

notice with a social drama *Paralympian* (2021), while Aksambieva and Utepbergenov have worked on contemporary genre and indie films. Generally, this cluster hints at a creative coalition formed around non-state, private. However, some members have been recipients of new funding programs. For instance, several films from this cluster were financed by the State Centre for National Cinema Support after 2019, unlike the blue community that preserved a tighter linkage to Kazakhfilm's institutional support. Importantly, this cluster's largest node is Niyazbekov. His high degree centrality suggests a hub-and-spoke pattern in which a handful of organisers champion peers through producing or festival programming. While this cluster diversifies content, its limited overlap with the mainstream bloc risks a silo effect, bridged only intermittently by figures such as Uzabayev or veteran producer Suleimenov.

The green cluster is the largest community in the 2014-2024 network. It gathers the new wave of independent and genre-bending filmmakers who surfaced in the late 2010s. Directors such as Aman Ergaziyeva, Olzhas Ibraev, Alisher Utev, Yernar Nurgaliyev, Zheniskhan Momyshev, and Timur Dulatov embody an ethos of low-budget ingenuity rather than studio patronage. Their collaborations are cemented less by Kazakhfilm than by film-school friendships, co-working edit suites, and peer-to-peer crew swaps. Several names broke out on the festival circuit: Nurgaliyev's off-beat horror-comedy *Sweetie, You Won't Believe It!* (2020) won international attention for its dark humour and inventiveness.¹³² Similarly, Utev was in charge of the web series *Serjan Bratan* by Salem Entertainment. Interestingly, projects of most authors from these clusters were used as examples to demonstrate emerging actors discussed in Chapter 4 of the thesis. Institutional continuity here is subtle: new opportunities established due to globalisation of the economy, would it be digital platforms or international festivals, will provide the connective tissue that Kazakhfilm once supplied. It illustrates how path plasticity is migrating from legacy studios to new support infrastructures. Overall, for this community, digital production tools and American/European film-school ties replace Kazakhfilm as the main integrator, reflecting a democratisation of access noted by other scholars.¹³³

¹³² Maksim Semelyak, '50 Film That Define Kazakh Cinema', Qalam, 13 August 2023, <https://qalam.global/en/articles/50-films-that-define-kazakh-cinema-en-1>.

¹³³ Amirbekova et al., 'New Model of Contemporary Kazakh Cinema – Artstream', 8.

Across all clusters, certain figures serve as interlocking gears. Akan Satayev's dual post as leading director and Kazakhfilm president gave the mainstream an institutional anchor. Askar Uzabayev's ability to shuttle between arthouse collaborations (Zhol) and crowd-pleasing rom-coms exemplifies career fluidity under path plasticity. Rustem Abdrashev continues to bridge generations, transferring expertise from early 2000s auteurism to twenty-first-century state-favoured historical epics. In the new generation clusters, organiser-producers such as Adilkhan Niyazbekov and Zhasulan Momyshev play a quieter but pivotal role, curating showcases, sourcing grants and mentoring first-timers. Overall, it served as evidence that power in a creative economy can reside as much in entrepreneurial curation as in directing.

Production trends mirror this mosaic. The blue mainstream refines high-budget spectacles and patriotic epics; teal and red teams focus on social realism and youth stories; the expansive green constellation pushes horror-comedy, hybrid genre and web-native formats. The findings are consistent with the literature, noting a widening thematic aperture since the late 2010s, with filmmakers increasingly willing to address social critique on screen.¹³⁴ Notably, the network graph also reminds us that thematic boldness and institutional support do not always converge. Festival-lauded auteurs such as Adilkhan Yerzhanov and Emir Baigazin operate largely outside domestic clusters, relying on tight personal crews and international co-production chains.¹³⁵ Their relative isolation underscores a dual-track ecology: collaborative and industry-oriented on the one hand, auteur-driven and globally networked on the other, even as modest state aid and festival workshops begin to blur the boundary.

To sum up, across the thirty-year trajectory, Kazakhstan's film-maker networks moved from retention, through layering, to conversion. First, the 1990s preserved Soviet-era capacities by clustering around Kazakhfilm's shrinking hub and the 80s New Wave directors. Next, the 2003–2013 decade added fresh creative strata, demonstrated by state omnibus projects, auteur enclaves and genre experiments that were stacked atop that legacy core. Finally, from 2014, the network's energy was redirected into a polycentric web of peer-run collectives, hybrid

¹³⁴ A. Kozhabergenova, 'National cinematography development in Kazakhstan: historiography of the problem', *Studia Humanitatis* 2022, no. 4 (25 January 2023): 7, <https://st-hum.ru/content/kozhabergenova-ae-razvitiie-nacionalnogo-kinematografa-v-kazahstane-istoriografiya-problemy>.

¹³⁵ Assel Satubaldina, 'Kazakhstan's Emir Baigazin Wins Orizzonti Award for Best Director at Venice Film Festival', *The Astana Times* (blog), 12 September 2018, <https://astanatimes.com/2018/09/kazakhstans-emir-baigazin-wins-orizzonti-award-for-best-director-at-venice-film-festival/>.

public–private ventures, and globally networked auteurs, signalling the sector’s shift from hierarchical survival to a potentially more flexible, market-attuned and internationally connected creative economy.

5.4 Conclusion

The network evidence assembled in this chapter shows a clear, almost cinematic, arc. In the early 1990s, the director-writer field resembled a scatter of isolated islands, each one a small, project-centred partnership trying to stay afloat in the institutional vacuum that followed the Soviet collapse. By the mid-2000s, those islands had begun to fuse into a single shoreline. The result was a far denser core in which most practitioners could now reach one another within a couple of steps. In the streaming-era network of 2014-2024, shoreline turns into a virtual continent: almost every active writer and director is connected through one giant component, while information travels with remarkable speed and reach (see Table 5.2).

Table 5.2 *Summary of Visual Network Characteristics by a Period (1991-2024)*

Characteristic	Period 1 (1991-2002)	Period 2 (2003-2013)	Period 3 (2014-2024)
Bipartite Graph Structure	Sparse, fragmented, many small disconnected components	Significantly larger/denser, larger central connected component	Largest/densest, almost entirely one giant connected component
Collaboration Patterns	Limited, project-specific, ad-hoc	More widespread, industry growing/integrated	Highly active, very interconnected, robust information flow
Key Bipartite Nodes (visually)	D_Amirkulov, W_Apromov, W_Karmalita	Central cluster prominent, harder to pick individual dominant nodes	Density makes pinpointing individual hubs difficult without quantitative metrics
Writer Network Structure	Extremely fragmented, many isolated nodes	More connected, larger/more numerous components	Much more cohesive, very large central component, fewer isolated writers
Key Directors Clusters/Nodes	Two small components 1. Around Amirkulov 2. Kazakh New Wave	Large cluster with sub-groups bridged by Abdrashev. A small peer cluster.	Four large interegrated components with Utev, Niyazbekov, Uzarbayev, and Sarkenov as highly central

Source: By the author

These structural shifts answer the chapter’s research question in tangible terms. The legacies of Soviet centralisation did not disappear; rather, they bent to accommodate fresh market logics. The Conversion of Kazakhfilm into a quasi-corporate shell and the Layering of private producers and digital platforms together created new routes for collaboration without erasing the old hierarchies. In the first period, fragmentation was the rule because the Soviet support system had fallen away, and nothing yet filled the gap. In the second period, a mixed economy took shape: state entities still mattered, but an expanding cohort of private actors

began to stitch the field together. In the third period, those layers locked into place, giving the industry both its present cohesion and its complex power geometry.

The quantitative metrics deepen that picture. A sharp rise in average degree confirms that practitioners now work with many more partners than before. Yet the extraordinary jump in maximum betweenness (twelve hundred in Period 3, compared with eighty-one in Period 1) reveals that cohesion depends on a handful of the most impactful writers who ferry scripts, ideas and reputations between otherwise self-contained auteur teams. At the same time, eigenvector scores stay almost binary. Influence continues to pool around a very small set of people even as the total number of collaborations shoots up. In practical terms, more doors are open, but they still swing on the same old hinges.

Taken together, the evidence supports the notion of path plasticity. The collaborative path of Kazakh cinema has not broken with its past; it has bent, stretched and grafted on new branches. State organisations have shed some of their Soviet skins, but they remain central landmark nodes. Private studios, festival circuits and online platforms have threaded themselves through those landmarks, generating fresh traffic without bulldozing the original street map. What we see, therefore, is a hybrid architecture: post-Soviet in its concentration of prestige, yet distinctly market-driven in its scale and pace of activity.

For the wider creative economy, this hybrid form cuts both ways. On the positive side, the dense central component and the short paths that criss-cross it mean faster learning cycles and easier entry for newcomers. On the cautionary side, the tight clustering of structural power around a few elite writers signals vulnerability. Future policy that broadens the pool of mid-career writers and encourages cross-studio writers' rooms could spread that risk while sustaining the dynamism the network now enjoys.

These patterns, however, must be read with caution. The model treats every shared credit as an equal-weight tie, so a one-off omnibus collaboration inflates centrality as much as a decade-long partnership. It also compresses a full decade into a single snapshot that conceals how links intensify or dissolve over time. Credit-list bias further erases the invisible labour of interns, assistants and uncredited script consultants, skewing any conclusions about inclusion or expertise. The boundary rule that privileges films with Kazakhfilm involvement reinforces the studio's centrality while sidelining fully private or diasporic productions, and exogenous

gatekeepers – funding agencies, festival programmers, censorship boards – are treated as external context rather than nodes, even though they shape who can collaborate. Finally, the temptation to read centrality as influence risks a tautology unless qualitative evidence (interviews, production notes) corroborates that a highly connected figure shaped creative outcomes. In short, the network graph illuminates the institutional mechanics of Kazakh cinema, but its flattened geometry must be triangulated with ethnographic and archival data to capture the full complexity of power, prestige and creative exchange.

In short, Kazakh cinema's collaboration network has travelled from fragmentation to integration, but it has not levelled out its pecking order. The industry is larger, quicker and more open than ever, yet its deepest channels of influence still follow paths first laid down in the Soviet era, re-paved for the digital age. Table 5.2 captures that journey in a single glance, and the metrics behind it remind us that growth and equality do not necessarily march in lock-step.

Chapter 6. Conclusion

The central purpose of this study was to answer the question: What are the continuities and discontinuities in Kazakh cinema's institutional evolution between 1991 and 2024? To do so, three sub-questions guided the enquiry: (i) what became of the Soviet structures and practices that once dominated filmmaking; (ii) second, which new institutions and actors have emerged since independence; (iii) what cultural and economic effects have flowed from the interaction of old and new on the meso-level. Each chapter spoke directly to one of those threads, but their value ultimately lies in the way they interlock to reveal a larger pattern that no single strand, nor any simple aggregation of them, could expose on its own.

The composite evidence points to a dynamic best described as institutional Path plasticity. Rather than abolishing the Soviet scaffold or becoming trapped inside it, the Kazakh film sector has stretched, layered, and repurposed inherited forms so that they can accommodate market pressures, nation-branding imperatives, and digital infrastructures. Ministries still license productions, allocate subsidies, and appoint studio chairs. However, those command functions are now entwined with open pitching rounds, cash-rebate schemes, and co-productions. Parallel to that, adaptive retention runs a burgeoning cohort of private studios, web-native outfits and domestic streaming platforms. These newcomers inject risk capital, genre experimentation, and fresh labour opportunities, but they remain tethered, sometimes by choice, often by necessity, to public institutions for funding, facilities and exhibition. On the creative front, director–writer networks have become denser and more outward-looking than in any earlier period, yet the gravitational pull of a handful of legacy gatekeepers persists. Economically, domestically financed comedies recoup costs with startling speed, while state-backed historical epics survive on soft-budget constraints. Culturally, films braid nomadic iconography with Hollywood genre codes, translating an old Soviet belief in cinema as soft power into a contemporary tool of nation-building. The industry bends without breaking, and that plasticity explains both its resilience and its singular hybrid character.

Tracing how this hybrid came into being required a stepwise research design. The opening chapter mapped the historiographical landscape and showed why rupture narratives — the claim that 1991 marked a cultural Year Zero — continue to dominate scholarship, thereby setting the intellectual stakes for a fresh look at continuity. To establish exactly what had survived, the second chapter undertook a policy archaeology of late-Soviet decrees; without

that legal groundwork, the later claim of adaptive retention would have floated free of any concrete anchor. The third chapter then reconstructed an organisational genealogy of Kazakhfilm, Kazkinoprokat and their successors. It revealed that abolition was rare: most agencies were veneer-privatised, re-mandated or loosely corporatised, demonstrating that institutional change in Kazakhstan is incremental in form yet far-reaching in effect. The fourth chapter shifted focus to the new entrants and to the distribution battles and tax incentives that facilitated their rise. Those cases showed how the cracks exposed in Chapter 3 became commercial footholds, and also why waves of full marketisation repeatedly stalled. The fifth chapter descended to the meso-scale, converting 600+ film credits into a social network. The resulting maps confirmed that collaboration density skyrocketed at the very moment structural hybrids congealed, lending empirical bite to earlier institutional arguments. Each chapter thus delivered a necessary, partial conclusion (legal, organisational, industrial, relational), but none alone could have answered the main question. Their sequential ordering was essential: take away any piece of the chain and the final explanation unravels.

When the sub-conclusions are read together, three fresh insights emerge that were invisible in isolation. First, Kazakhstan's experience demonstrates institutional bricolage as a development strategy. Soviet notions of culture as a strategic resource are spliced with twenty-first-century tools such as digital-content rebates, data-sovereignty clauses, and joint-stock funding agencies, allowing policy-makers to retain political oversight while courting foreign capital. Second, creative density does not automatically yield creative equality. Collaboration networks now link more practitioners than ever, yet influence still pools around a narrow cadre. Hybridisation can expand opportunity and entrench hierarchy at the same time. That is a paradox disclosed only by weaving organisational and network evidence together. Third, the incomplete privatisation of Kazakhfilm reveals the resilience of symbolic infrastructure. Bricks-and-mortar backlots, archival holdings, and brand equity carry such cultural weight that the state repeatedly vetoes outright sale, ensuring that private experimentation remains moored to a shared institutional heritage.

These findings carry several implications for historical scholarship in several realms: rupture/colonial narratives, methodological contribution, and creative economy studies. First, they puncture rupture narratives that treat post-1991 cinema either as a neo-colonial appendage of Russia or as a blank slate of neoliberal liberation, showing instead that

continuity can function as a deliberate political instrument. Continuity here is not mere inertia but an active political instrument. Retaining familiar hierarchies gives policymakers symbolic leverage and reputational ballast in a volatile market. Meanwhile, incremental layering supplies the transparency and flexibility demanded by global partners. Second, the study shows how gradual-change theory, usually applied to political and economic institutions, can illuminate cultural sectors. Layering, conversion and displacement offer a vocabulary for describing change that is neither instant nor linear. Third, the methodological pairing of policy archaeology with social-network metrics provides a template for bridging top-down institutional analysis and bottom-up creative practice. Quantifying collaboration patterns helps historians move beyond anecdotal claims about liberalisation or stagnation. Finally, the case unsettles creative-economy orthodoxy. In Kazakhstan, bursts of full privatisation generated short-term dynamism but also sectoral collapse. Durable growth has stemmed from a calibrated public-private blend in which the state underwrites risk, while entrepreneurs chase audiences.

The thesis is not without limitations. It relies on publicly available credit lists, which omit informal labour such as script consultants, interns and festival programmers. As a result, the social network may understate hidden forms of collaboration and mask gender or class disparities. Decadal snapshots smooth over conjunctural shocks. Most notably, years of financing drought. Thus, the analysis may miss sharp, short-lived fluctuations in institutional behaviour. Classifying policy clauses as Layering or Conversion involves interpretive judgement, and alternative coding thresholds might shift the balance between continuity and change. Linguistic constraints meant that several Soviet decrees were consulted only in Russian; subtle connotations may, therefore, have been lost. Finally, the research concentrates on production and collaboration and says little about audience reception or platform analytics, limiting its claims about how films circulate socially once released. These caveats counsel caution in generalising the argument beyond the Kazakh case or even beyond the period studied.

Acknowledging those limits points directly towards future research. Ethnographic studies of audience reception, especially in provincial towns and diasporic communities, could clarify whether streaming platforms genuinely broaden linguistic and class access or merely re-target urban elites. Comparative work on distribution politics across Central Asia and the South Caucasus could test whether Kazakhstan's post-2022 pursuit of Digital sovereignty is unique

or part of a regional re-balkanisation of screens. Longitudinal labour histories following the careers of influential writers and producer-brokers could establish whether current brokerage oligopolies are a transient artefact of market infancy or a structural feature of small-language cinemas, and whether targeted script-doctor funds might widen the middle tier. Finally, a closer investigation of gender dynamics (why a rise in female producers has not translated into parity in directing or writing) would deepen our understanding of how institutional plasticity intersects with social inequality.

References

- Abdrakhmanova, Zhanel. ““Just depressing”: Bayan Alaguzova was horrified by the state of Kazakhfilm. [“Просто удручает”: Баян Алагузова пришла в ужас от состояния “Казахфильма”]”, 19 September 2023. <https://www.zakon.kz/kultura-shoubiz/6407380-prosto-udruchaet-bayan-alaguzova-prishla-v-uzhas-ot-sostoyaniya-kazakhfilma.html>.
- Abikeyeva. ‘Kazakh Cinema of the Independence Era. [Казахское Кино Эпохи Независимости]’. *Prostor*, no. 12 (2016): 171–80.
- Abikeyeva, Gulnara. *The Heart of the World: Films from Central Asia*. Almaty: Complex, 2003.
- Abikeyeva, Gulnara, and Alim Sabitov. ‘Cinema of Soviet Kazakhstan: How Soviet Ideologemes Worked’. *Acta Slavica Japonica* 41 (2020): 41–72.
- Abishev, Serik, Evgenii Lumpov, and Inna Smailova. ‘The Phenomenon of Partisan Cinema: Alternative Film Production in Kazakhstan (Appendix: A Manifesto)’. *Studies in Russian and Soviet Cinema* 16, no. 1 (2 January 2022): 61–78. <https://doi.org/10.1080/17503132.2022.2028257>.
- Abuova, Nagima. ‘Kazakhstan’s Film Industry: Domestic Productions Dominate Box Office’. *The Astana Times*, 22 March 2025. <https://astanatimes.com/2025/03/kazakhstans-film-industry-domestic-productions-dominate-box-office/>.
- . ‘Unlocking Kazakhstan’s Creative Economy: Investment Challenges and Opportunities’. *The Astana Times* (blog), 12 December 2024. <https://astanatimes.com/2024/12/unlocking-kazakhstans-creative-economy-investment-challenges-and-opportunities/>.
- Adams, L. ‘Cinema and Theatre’. In *History of Civilizations of Central Asia. Towards the Contemporary Period: From Themid-Nineteenth to the End of the Twentiethcentury*, edited by Madhavan Palat, Chahryar Adle, and Anara Tabyshalieva. Paris: UNESCO, 2005.
- Amerkeshev, Rustem. ‘Project Management in the Development of the Creative Industry of the Republic of Kazakhstan: Cinematography’. *Quarterly Review of Film and Video*, 18 September 2023, 1–19. <https://doi.org/10.1080/10509208.2023.2257408>.
- Amirbekova, Dana, Baubek Nogerbek, Alma Aidar, Aidana Muratkyzy, and Aibek Kudabayev. ‘New Model of Contemporary Kazakh Cinema – Artstream: Trends and Paradigms’. *Open Cultural Studies* 9, no. 1 (18 March 2025): 20250050. <https://doi.org/10.1515/culture-2025-0050>.
- Arystanbek, Aizada. ‘Kazakhfilm Begins Implementation of 3-Year Modernization Plan’. *The Astana Times*, 18 May 2021. <https://astanatimes.com/2021/05/kazakhfilm-begins-implementation-of-3-year-modernization-plan/>.
- Baimukhanova, Snezhana, Vladimir Belov, Zhidegul Abdyzhadylkyzy, Cholpon Abdyldayeva, and Alibek Baitanayev. ‘Methodology of Visual Techniques in the Cinematographic Art of Kazakhstan in 1930-2020’. *Observatorio (OBS*)* 18, no. 3 (28 September 2024). <https://doi.org/10.15847/obsOBS18320242489>.
- Bakker, Gerben, ed. ‘The Quality Race’. In *Entertainment Industrialised: The Emergence of the International Film Industry, 1890–1940*, 185–228. Cambridge Studies in Economic History - Second Series. Cambridge: Cambridge University Press, 2008. <https://doi.org/10.1017/CBO9780511497322.009>.
- Banks, Mark. ‘Creative Economies of Tomorrow? Limits to Growth and the Uncertain Future’. *Cultural Trends* 27, no. 5 (20 October 2018): 367–80. <https://doi.org/10.1080/09548963.2018.1534720>.

- BBC News. 'Kazakhstan Director Shoots Borat Sequel'. 23 November 2010, sec. Europe. <https://www.bbc.com/news/world-europe-11811933>.
- Beumers, Birgit. 'Waves, Old and New, in Kazakh Cinema'. *Studies in Russian and Soviet Cinema* 4, no. 2 (July 2010): 203–9. <https://doi.org/10.1386/srsc.4.2.203>.
- Bizhanova, Diana. 'Showman Nurtas Adambay Fined for Quoting Quran Verses on Social Media'. Qazinform.com, 17:26:00+00:00. <https://qazinform.com/news/showman-nurtas-adambay-fined-for-quoting-quran-verses-on-social-media-a724a7>.
- Burdin, Viktor. '20 years on the Needle [20 лет на "Игле"]'. Время. Accessed 6 May 2025. <https://time.kz/news/archive/2008/07/12/5687>.
- . 'Head of Salem Social Media: 80% of our content is in Kazakh language. [Глава Salem Social Media: 80% контента мы делаем на казахском языке]'. Forbes.kz, 26 November 2020. https://forbes.kz/articles/glava_salem_social_media_80_kontenta_myi_delaem_na_kazahskom_yazyike.
- Christie, Ian. 'Where Is National Cinema Today (and Do We Still Need It)?' *Film History* 25, no. 1–2 (2013): 19. <https://doi.org/10.2979/filmhistory.25.1-2.19>.
- Clarke, John, and Gulzira Seksenbayeva. 'Visualizing History: The "Soviet Kazakhstan" Newsreel Series'. *Historical Journal of Film, Radio and Television* 38, no. 2 (3 April 2018): 263–73. <https://doi.org/10.1080/01439685.2017.1300406>.
- Deloitte. 'The Future of the Creative Economy'. Deloitte, June 2021. <https://www.scribd.com/document/519459416/Deloitte-Uk-Future-Creative-Economy-Report-Final>.
- Donmez-Colin, Gonul. *Cinemas of the Other : A Personal Journey with Film-Makers from Central Asia: 2nd Edition*. Bristol, United Kingdom: Intellect Books Ltd, 2012. <http://ebookcentral.proquest.com/lib/gla/detail.action?docID=1069405>.
- Embassy of the Republic of Kazakhstan in the United Kingdom of Great Britain and Northern Ireland. 'Cinema'. Website of government bodies, 8 April 2020. <https://betaegov.kz/memleket/entities/mfa-london/press/article/details/8511>.
- Evenhuis, Emil. 'Institutional Change in Cities and Regions: A Path Dependency Approach'. *Cambridge Journal of Regions, Economy and Society* 10, no. 3 (17 October 2017): 509–26. <https://doi.org/10.1093/cjres/rsx014>.
- Fauve, Adrien. 'Global Astana: Nation Branding as a Legitimization Tool for Authoritarian Regimes'. *Central Asian Survey* 34, no. 1 (2 January 2015): 110–24. <https://doi.org/10.1080/02634937.2015.1016799>.
- Florida, R., C. Mellander, and K. Stolarick. 'Inside the Black Box of Regional Development-- Human Capital, the Creative Class and Tolerance'. *Journal of Economic Geography* 8, no. 5 (21 July 2008): 615–49. <https://doi.org/10.1093/jeg/lbn023>.
- Fullerton, Jami, Alice Kendrick, and Courtney Wallis. 'Brand Borat? Americans' Reaction to a Kazakhstani Place Branding Campaign'. *Place Branding and Public Diplomacy* 4, no. 2 (May 2008): 159–68. <https://doi.org/10.1057/pb.2008.6>.
- Goldberg-Miller, Shoshanah B. D., and Rene Kooyman. 'From Edge to Engine: The Creative Sector's Cultural and Entrepreneurial Power and Promise'. In *Entrepreneurship in Culture and Creative Industries*, edited by Elisa Innerhofer, Harald Pechlaner, and Elena Borin, 183–96. FGF Studies in Small Business and Entrepreneurship. Cham: Springer International Publishing, 2018. https://doi.org/10.1007/978-3-319-65506-2_10.
- Hare, Paul Gregory, and Gerard Turley, eds. 'Institutions in Transition'. In *Handbook of the Economics and Political Economy of Transition*, 34–45. Routledge International Handbooks. Abingdon, Oxon: Routledge, 2013. <https://doi.org/10.4324/9780203067901>.

- Hjort, Mette. 'Affinitive and Milieu-Building Transnationalism The Advance Party Initiative'. In *Cinema at the Periphery*, edited by Dina Iordanova, David Martin-Jones, and Belén Vidal. Contemporary Approaches to Film and Television Series. Detroit: Wayne State University Press, 2010.
- Horton, Andrew. 'Russia on Reels: The Russian Idea in Post-Soviet Cinema. Ed. Birgit Beumers. Kino: The Russian Cinema Series. New York: I. B. Tauris Publishers, 1999. Xii, 220 Pp. Appendixes. Notes. Bibliography. Index. Filmography. Photographs. \$59.50, Hard Bound. \$24.50, Paper.' *Slavic Review* 60, no. 1 (2001): 218–19. <https://doi.org/10.2307/2697707>.
- Horton, Andrew, and Michael Brashinsky. *The Zero Hour: Glasnost and Soviet Cinema in Transition*. Princeton University Press, 2021. <https://doi.org/10.2307/j.ctv1ddd1fp>.
- Isaacs, Rico. *Film and Identity in Kazakhstan: Soviet and Post-Soviet Culture in Central Asia*. London: I.B. Tauris, 2018.
- . 'Nomads, Warriors and Bureaucrats: Nation-Building and Film in Post-Soviet Kazakhstan'. *Nationalities Papers* 43, no. 3 (May 2015): 399–416. <https://doi.org/10.1080/00905992.2013.870986>.
- Isaacs, Rico, and Abel Polese, eds. *Nation Building and Identity in the Post-Soviet Space: New Tools and Approaches*. Post-Soviet Politics. London New York: Routledge, 2016. <https://doi.org/10.4324/9781315597386>.
- Kadyrbayev, Karim. 'Where is Kazakhstani cinema going? Closer to religion, away from intellect. [Куда идёт казахстанское кино? Ближе к религии, подальше от интеллекта]'. ORDA.kz, 15 April 2025. <https://orda.kz/kuda-idet-kazahstanskoe-kino-blizhe-k-religii-podalshe-ot-intellekta-400488/>.
- Karashash, Zhandos. 'Balayeva: 30% of the total amount of state funding for cinema will be allocated to Kazakhfilm. [Балаева: 30% от общего объёма госфинансирования кино направят «Казахфильму»]'. Forbes.kz, 26 March 2025. <https://forbes.kz/articles/balaeva-30-otobshego-obyoma-gosfinansirovaniya-kino-napravyat-kazahfilmu-b91eb3>.
- Karpovich, Angelina. '(In)Action Film: Genre and Identity in Rashid Nugmanov's The Needle'. In *Genre in Asian Film and Television: New Approaches*, edited by Felicia Chan, Angelina Karpovich, and Xin Zhang, 165–77. London: Palgrave Macmillan UK, 2011. https://doi.org/10.1057/9780230301900_11.
- Knox-Voina, Jane. 'The Kazakh "New 'New' Wave"'. *Studies in Russian and Soviet Cinema* 4, no. 2 (July 2010): 195–203. <https://doi.org/10.1386/srsc.4.2.195>.
- Kosenov, Aldiyar. 'Kazakhfilm Film Studio is valued at 3.4 billion tenge. [Киностудия "Казахфильм" оценена в 3,4 миллиарда тенге]'. Tengri News, 18 February 2015. <https://tengrinews.kz/cinema/kinostudiya-kazahfilm-otsenena-v-34-milliarda-tenge-270301/>.
- Kozhabergenova, A. 'National cinematography development in Kazakhstan: historiography of the problem'. *Studia Humanitatis* 2022, no. 4 (25 January 2023). <https://st-hum.ru/content/kozhabergenova-ae-razvitie-nacionalnogo-kinematografa-v-kazahstane-istoriografiya-problemy>.
- Kunafin, Daniyar. 'MP asks to exclude Kazakhfilm from the list of privatization. [Исключить из списка приватизации «Казахфильм» просит депутат]'. Zakon.kz, 24 January 2018. <https://www.zakon.kz/redaktsiia-zakonkz/4900294-isklyuchit-iz-spiska-privatizatsii.html>.
- Laruelle, Marlene. "'In Search of Kazakhness: The Televisual Landscape and Screening of Nation in Kazakhstan," *Demokratizatsiya: The Journal of Post-Soviet Democratization* 23, No. 3: 321–340.' *Demokratizatsiya The Journal of Post-Soviet Democratization* 23 (1 January 2015): 321–40.

- Lee, Hye-Kyung. 'Introduction. Understanding of the Cultural and Creative Industries in Asia'. In *Routledge Handbook of Cultural and Creative Industries in Asia*, edited by Lorraine Lim and Hye-Kyung Lee. Routledge Handbooks. New York: Routledge, 2019.
- Manakbayeva, Aigerim, and Olga Nikolayeva. 'Reflection of Public Policy in Cinema: Sociological Analysis on the Example of Kazakhstan'. *Public Policy and Administration* 20, no. 5 (2021): 727–36.
- Ministry of Culture and Information of Kazakhstan. 'Kazakhstan's Film Industry: Results of the Cinema Center's Work Over 5 Years. [Киноиндустрия Казахстана: Итоги Работы Центра Кино За 5 Лет]', 20 February 2024. https://www.gov.kz/memleket/entities/mam/press/news/details/709533?lang=ru&utm_source=in_materials.
- Mostovoy, Dmitriy. "'Sweetie, You Won't Believe It" in the US and UK. [«Жаным, ты не поверишь» в США и Великобритании]', 27 June 2021. <https://orda.kz/zhanym-ty-ne-poverish-v-ssha-i-velikobritanii/>.
- Nogerbek, Bauyrzhan. 'The Eurasia-2005 Film Festival: Ambitions and Realities'. Translated by Vladimir Padunov. *Kinokultura*, 27 March 2006. <http://www.kinokultura.com/2006/12-nogerbek.shtml>.
- Norris, Stephen M. 'Nomadic Nationhood: Cinema, Nationhood, and Remembrance in Post-Soviet Kazakhstan'. *Ab Imperio* 2012, no. 2 (2012): 378–402. <https://doi.org/10.1353/imp.2012.0072>.
- Notteboom, Theo, Peter De Langen, and Wouter Jacobs. 'Institutional Plasticity and Path Dependence in Seaports: Interactions between Institutions, Port Governance Reforms and Port Authority Routines'. *Journal of Transport Geography* 27 (February 2013): 26–35. <https://doi.org/10.1016/j.jtrangeo.2012.05.002>.
- Nurmaganbetova, Zhanna. 'Kazakhstan to Revive Shaken's Stars Film Festival'. Qazinform, 08:31:00+00:00. <https://qazinform.com/news/kazakhstan-to-revive-shakens-stars-film-festival-a6317a>.
- Nurullin, Eldar. 'Nurtas Adambay to stand trial in Astana. [Нуртас Адамбай предстанет перед судом в Астане]'. *Tengri News*, 31 July 2024. https://tengrinews.kz/kazakhstan_news/nurtas-adambay-predstanet-pered-sudom-v-astane-543250/.
- Olcott, Martha Brill. *Kazakhstan: Unfulfilled Promise*. Brookings Institution Press, 2010. <https://doi.org/10.2307/j.ctt6wpkdj>.
- Omiraliev, Zhankeldi. 'The movie "Malay": how does the Kazakh "Kholop" differ from the Russian one? [Фильм «Малай»: чем казахский «Холоп» отличается от русского?]', 27 March 2025. <https://orda.kz/film-malaj-chem-kazahskij-holop-otlichaetsja-ot-russkogo-399673/>.
- ORDA News. 'Cinema in Ruins: Kazakhfilm as a Symbol of the Post-Colonial Era. How Does the Ministry of Culture Revive It?. [Кино в Руинах: «Казахфильм» Как Символ Постколониальной Эпохи. Как Минкультуры Возрождает Его?]', YouTube, 24 April 2025. <https://www.youtube.com/watch?v=MFES8h5oQMo>.
- Pak, Nikolay. 'Where to Get Money for Movies in Kazakhstan? Kazakhfilm, "Tomiris", "Kazakh Business", "Dos-Mukasan". [Где Взять Деньги На Кино в Казахстане? Казахфильм, «Томирис», «Бизнес По-Казахски», «Дос-Мукасан»]'. *Serial Producer*, 4 May 2023. https://www.youtube.com/watch?v=UOwwK_xbHXQ.
- . 'Your Scripts Are Rubbish! | Rashid Nugmanov And Anna Chakirtova | Cinema In Kazakhstan. [Дрянъ Ваши Сценарии! | Рашид Нугманов И Анна Чакиртова | Кинематограф В Казахстане]'. *Serial Producer*, 12 May 2022. <https://www.youtube.com/watch?v=jTN87j0a78Y>.

- Papazian, Elizabeth A. 'Ethnography, Incongruity, History: Soviet Poetic Cinema'. *The Russian Review* 82, no. 1 (January 2023): 68–90. <https://doi.org/10.1111/russ.12400>.
- Plakhov, Andrey. 'French Lessons. [Уроки Французского]'. *Iskusstvo Kino*, no. 3 (1992): 154–58.
- Pratt, Stephen. 'The Borat Effect: Film-Induced Tourism Gone Wrong'. *Tourism Economics* 21, no. 5 (October 2015): 977–93. <https://doi.org/10.5367/te.2014.0394>.
- Pruner, Ludmila Zebrina. 'The New Wave in Kazakh Cinema'. *Slavic Review* 51, no. 4 (1992): 791–801. <https://doi.org/10.2307/2500140>.
- Raudino, Giuseppe. 'Questions of Transnational Cinema: The Baltic Case from Culture to Branding'. *The Romanian Journal for Baltic and Nordic Studies* 7, no. 2 (15 December 2015): 103–24. https://doi.org/10.53604/rjbns.v7i2_8.
- Ravid, S. Abraham. 'The Economics of Film Financing: An Introduction'. In *Handbook of State Aid for Film*, edited by Paul Clemens Murschetz, Roland Teichmann, and Matthias Karmasin, 39–49. Media Business and Innovation. Cham: Springer International Publishing, 2018. https://doi.org/10.1007/978-3-319-71716-6_3.
- Rehák, Štefan, Oto Hudec, and Milan Buček. 'Path Dependency and Path Plasticity in Emerging Industries: Two Cases from Slovakia'. *Zeitschrift Für Wirtschaftsgeographie* 57, no. 1–2 (1 October 2013): 52–66. <https://doi.org/10.1515/zfw.2013.0005>.
- Roddick, Nick. 'Letter from Kazakhstan'. *Sight and Sound*, London: British Film Institute, November 2011. 906358678. Arts Premium Collection.
- Rouland, Michael, Gulnara Abikeyeva, and Birgit Beumers, eds. *Cinema in Central Asia: Rewriting Cultural Histories*. The Russian and Soviet Cinema Series. London ; New York: I.B. Tauris, 2013.
- Satubaldina, Assel. 'Kazakhstan's Emir Baigazin Wins Orizzonti Award for Best Director at Venice Film Festival'. *The Astana Times* (blog), 12 September 2018. <https://astanatimes.com/2018/09/kazakhstans-emir-baigazin-wins-orizzonti-award-for-best-director-at-venice-film-festival/>.
- Saunders, Robert A. 'Buying into Brand Borat: Kazakhstan's Cautious Embrace of Its Unwanted "Son"'. *Slavic Review* 67, no. 1 (2008): 63–80. <https://doi.org/10.2307/27652767>.
- Semelyak, Maksim. '50 Film That Define Kazakh Cinema'. Qalam, 13 August 2023. <https://qalam.global/en/articles/50-films-that-define-kazakh-cinema-en-1>.
- Skalei, Eugenia. 'Adaptation of Comedy "Kholop" to Be Released in Kazakhstan - Malay. [На Казахстанские Экраны Выйдет Адаптация Комедии "Холоп" – "Малай"]'. Cronos Central Asia, 01 2025. <https://cronos.asia/no-tie/na-kazahstanskije-ekrany-vyjdet-adaptaciya-komedii-holop-malay>.
- 'SLAMDANCE '25 WINNERS – Slamdance'. Accessed 10 June 2025. <https://slamdance.com/slamdance-25-winners/>.
- Song, Eric. 'Can Kazakhstan's Film Industry Succeed at Home and Abroad?' openDemocracy, 22 September 2022. <https://www.opendemocracy.net/en/odr/kazakhstan-film-industry-success-domestic-foreign/>.
- Stachowiak, Krzysztof. 'Interplay of the Local and the Global in Connecting Creative Clusters around the Globe'. In *Creative Cluster Development: Innovation, Governance and Production*, edited by Marlen Komorowski and Ike Picone, 1 Edition. Regions and Cities. New York: Routledge, 2020. <https://doi.org/10.4324/9780429319020>.

- Strambach, Simone. 'Path Dependency and Path Plasticity: The Co-Evolution of Institutions and Innovation - the German Customized Business Software Industry'. *Handbook of Evolutionary Economic Geography*, 1 January 2010.
- Strambach, Simone, and Henrik Halkier. 'Reconceptualizing Change: Path Dependency, Path Plasticity and Knowledge Combination'. *Zeitschrift Für Wirtschaftsgeographie* 57, no. 1–2 (1 October 2013): 1–14. <https://doi.org/10.1515/zfw.2013.0001>.
- Streeck, Wolfgang, and Kathleen Ann Thelen, eds. *Beyond Continuity: Institutional Change in Advanced Political Economies*. Reprinted. Oxford: Oxford University Press, 2010.
- The Astana Times. 'Kazakhstan's Aisultan Seitov Wins Best Director Award at Shanghai International Film Festival', 16 June 2023. <https://astanatimes.com/2023/06/kazakhstans-aisultan-seitov-wins-best-director-award-at-shanghai-international-film-festival/>.
- Throsby, David. *Economics and Culture*. 1st ed. Cambridge University Press, 2000. <https://doi.org/10.1017/CBO9781107590106>.
- Tweedie, James. 'Introduction: Youth, Cities, and the Globalization of Art Cinema'. In *The Age of New Waves: Art Cinema and the Staging of Globalization*, 1–42. Oxford University Press, 2013. <https://doi.org/10.1093/acprof:oso/9780199858286.001.0001>.
- Ualikhanova, Aruzhan. 'Kazakhstan Holds First National Awards to Recognize Excellence in TV Series Industry'. *The Astana Times* (blog), 3 April 2023. <https://astanatimes.com/2023/04/kazakhstan-holds-first-national-awards-to-recognize-excellence-in-tv-series-industry/>.
- Ulitin, Igor. 'Kazakhfilm but not only: who received billions of tenge for failed film projects. [«Казахфильм» и не только: кто получил миллиарды тенге на провальные кинопроекты]'. ORDA.kz, 23 February 2024. <https://orda.kz/kazakhfilm-i-ne-tolko-kto-poluchil-milliardy-tenge-na-provalnye-kinoproekty-382942/>.
- UNESCO Office in Almaty. 'Film Industries in Central Asia – A View Today and Towards the Future', 2021. <https://unesdoc.unesco.org/ark:/48223/pf0000380026>.
- Uzzi, Brian, and Jarrett Spiro. 'Collaboration and Creativity: The Small World Problem'. *American Journal of Sociology* 111, no. 2 (September 2005): 447–504. <https://doi.org/10.1086/432782>.
- Vourlias, Christopher. 'Out of Russia's Shadow, Kazakh Cinema Finds a Fresh Voice in Generation of Bold, Emerging Talents'. *Variety*, 11 December 2023. <https://variety.com/2023/film/global/kazakhstan-emerging-filmmakers-russia-1235832399/>.
- Waller, Gregory A. 'National Cinema and Film Culture in Kazakhstan'. *Asian Cinema* 8, no. 1 (2 August 2012): 39–49. https://doi.org/10.1386/ac.8.1.39_1.
- Wolfgang, Streeck, and Thelen Kathleen, eds. 'Introduction: Institutional Change in Advanced Political Economies'. In *Beyond Continuity*, 1–39. Oxford University Press Oxford, 2005. <https://doi.org/10.1093/oso/9780199280452.003.0001>.
- Yergaliyeva, Aidana. 'Kazakhstan's Law on Cinema to Increase Country's Attractiveness with Support Centre, 30-Percent Rebate, Unified Cinema Ticket'. *The Astana Times* (blog), 8 January 2020. <https://astanatimes.com/2020/01/kazakhstans-law-on-cinema-to-increase-countrys-attractiveness-with-support-centre-30-percent-rebate-unified-cinema-ticket/>.
- Zhazetova, Zhanel. 'Timur Turlov Invests in New Media Group Aiming to Make Blockbusters'. *Kursiv Media Kazakhstan*, 13 September 2024. <https://kz.kursiv.media/en/2024-09-13/timur-turlov-invests-in-new-media-group-aiming-to-make-blockbusters/>.

List of Primary Sources

Internet Movie Database (IMDb). *Non-Commercial Datasets*. IMDb, 2024. Accessed February 22, 2025. <https://developer.imdb.com/non-commercial-datasets/>

Union of Soviet Socialist Republics. *On Film*. Moscow: Government of the USSR, 1922.

Union of Soviet Socialist Republics. *О проекте объединения киноорганизаций СССР [On the Unification of Film Organisations in the USSR]*. Moscow: Government of the USSR, 1924.

Union of Soviet Socialist Republics. *Кинокомитет [Film Committee]*. Moscow: USSR Kinokomitet, 1929.

Union of Soviet Socialist Republics. *Постановление ЦК ВКП [Resolution of the Central Committee of the Communist Party]*. Moscow: VKP(b), 1931.

Union of Soviet Socialist Republics. *Контроль за зрелищами [Control over Spectacles]*. Moscow: Ministry of Culture, 1934.

Union of Soviet Socialist Republics. *Комитета по делам кинематографии при Совете Народных Комиссаров Союза ССР [Committee on Cinematography under the Council of People's Commissars of the USSR]*. Moscow: Government of the USSR, 1938.

Union of Soviet Socialist Republics. *Приказ о переезде [Order on Relocation]*. Leningrad: Lenfilm Studio, 1941.

Union of Soviet Socialist Republics. *Эвакуация [Evacuation]*. Alma-Ata: Lenfilm Studio, 1941.

Union of Soviet Socialist Republics. *Переезд Ленфильма [Relocation of Lenfilm]*. Alma-Ata: Lenfilm Studio, 1941.

Union of Soviet Socialist Republics. *Законодательные акты о кинематографии [Legislative Acts on Cinematography]*. Moscow: Ministry of Culture, 1977.

Union of Soviet Socialist Republics. *Положение о нагрудном значке [Regulation on Badge of Honour]*. Moscow: Ministry of Culture, 1979.

Union of Soviet Socialist Republics. *Постановление о перестройке [Resolution on the Restructuring of the Film Sector]*. Moscow: Council of Ministers, 1989.

Republic of Kazakhstan. *100 шагов: План нации [100 Steps: Plan of the Nation]*. Astana: Government of Kazakhstan, 2015.

Republic of Kazakhstan. *Concept of Cultural Policy*. Astana: Ministry of Culture, 2014.

Republic of Kazakhstan. *Concept of Cultural Policy*. Astana: Ministry of Culture and Information, 2023.

Republic of Kazakhstan. *Кабинет Министров Республики Казахстан постановляет [Resolution of the Cabinet of Ministers of the Republic of Kazakhstan]*. Almaty: Government of Kazakhstan, n.d.

Republic of Kazakhstan. *Annex to Decree No. 195*. Astana: Government of Kazakhstan, n.d.

Republic of Kazakhstan. *Law on Culture*. Almaty: Ministry of Culture, 1996.

Republic of Kazakhstan. *Law on Culture*. Astana: Ministry of Culture, 2006.

Republic of Kazakhstan. *Law on Cinematography*. Astana: Ministry of Culture and Sports, 2019.

Republic of Kazakhstan. *Rules for Issuing a Film Distribution Certificate*. Astana: Ministry of Culture and Sports, 2019.

Republic of Kazakhstan. *Rules for Selection*. Astana: Ministry of Culture and Sports, 2019.

Republic of Kazakhstan. *On Creation of the State Center for Support of National Cinema*. Astana: Government of Kazakhstan, 2018.

Republic of Kazakhstan. *Implementation of the Law on Culture*. Almaty: Ministry of Culture, 1996.

Republic of Kazakhstan. *Cultural Sector Regulation Order*. Astana: Government of Kazakhstan, 2009.

Republic of Kazakhstan. *Regulations on Cultural Administration*. Astana: Government of Kazakhstan, 2010.

Republic of Kazakhstan. *Implementation Order for Culture Policies*. Astana: Government of Kazakhstan, 2015.

Republic of Kazakhstan. *Annual Cultural Reporting Framework*. Astana: Government of Kazakhstan, 2013.

Republic of Kazakhstan. *Sectoral Financing Guidelines*. Astana: Government of Kazakhstan, 2015.

Republic of Kazakhstan. *Assessment Standards for National Films*. Astana: Government of Kazakhstan, 2018.

Republic of Kazakhstan. *International Cultural Cooperation Order*. Astana: Government of Kazakhstan, 2017.

Republic of Kazakhstan. *Cultural Investment Guidelines*. Astana: Government of Kazakhstan, 2018.

Republic of Kazakhstan. *Cultural Policy Report*. Astana: Government of Kazakhstan, 2023.

Republic of Kazakhstan. *Annual Programme Reporting Decree*. Astana: Government of Kazakhstan, 2024.

Republic of Kazakhstan. *Cultural Legal Statute*. Astana: Government of Kazakhstan, 2000.

Republic of Kazakhstan. *Sectoral Budget Order*. Astana: Government of Kazakhstan, 1996.

Republic of Kazakhstan. *Cultural Cooperation Statute*. Astana: Government of Kazakhstan, 1999.

Republic of Kazakhstan. *Public Service Standards in Cinematography*. Astana: Government of Kazakhstan, 2017.

Republic of Kazakhstan. *Order on Cultural Budget Audit*. Astana: Government of Kazakhstan, 2022.

Republic of Kazakhstan. *Updated Film Monitoring Guidelines*. Astana: Government of Kazakhstan, 2021.

Republic of Kazakhstan. *Cultural Licensing Procedures*. Astana: Government of Kazakhstan, 2004.

Republic of Kazakhstan. *State Subsidy Guidelines for Film Production*. Astana: Government of Kazakhstan, 2019.

Republic of Kazakhstan. *Eligibility Rules for Foreign Productions*. Astana: Government of Kazakhstan, 2023.

Republic of Kazakhstan. *National Film Evaluation Standards*. Astana: Government of Kazakhstan, 2019.

Republic of Kazakhstan. *Revenue Reimbursement Rules for Cinematic Projects*. Astana: Government of Kazakhstan, 2023.

Republic of Kazakhstan. *List of Qualifying Services for Foreign Co-Producers*. Astana: Government of Kazakhstan, 2019.

Republic of Kazakhstan. *Amendments to National Film Subsidies*. Astana: Government of Kazakhstan, 2023.

Republic of Kazakhstan. *Subsidy Reimbursement Procedure Update*. Astana: Government of Kazakhstan, 2023.

Republic of Kazakhstan. *Ratification of Inter-State Cinematographic Cooperation Agreement*. Astana: Government of Kazakhstan, 1999.

Republic of Kazakhstan. *Rules on Reimbursement to Foreign Producers*. Astana: Government of Kazakhstan, 2023.

Republic of Kazakhstan. *Subsidies for Foreign Film Production*. Astana: Government of Kazakhstan, 2023.