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KAZAKHSTAN'S RECIPROCAL TRADE WITHIN THE EAEU

This article analyses the main results of the impact of Eurasian integration on Kazakhstan's economy, in particular, mutual trade for the period from 2015 to 2019. A structural analysis is conducted and the main trends and dynamics factors, commodity structure of Kazakhstan's exports and imports within the framework of the Eurasian Economic Union are presented. Integration effects in mutual trade of Kazakhstan with EAEU member states are assessed. Research methods: a comparative analysis of dynamic series, structural-logical, economic-statistical, comparative analysis. As a result of the analysis, preliminary conclusions can be made that in most areas of Kazakhstan's cooperation with the EAEU countries, there has been an outperformance. The comparative analysis of mutual trade between EAEU member states reveals that the coronavirus pandemic has hit the economic activity of the Eurasian Economic Union states, including Kazakhstan, significantly and has revealed a trend of imbalanced mutual trade in Kazakhstan during the EAEU functioning period, which demonstrates weak diversification and low intersectoral importance and dependence of the Republic on the international market. Accordingly, this may hurt harm Kazakhstan's national economy within the EAEU.

Keywords: *Eurasian Economic Union, integration processes, single market of goods, mutual trade, internal market, foreign trade, imbalance in mutual trade, trade structure, export, import.*

Кілт сөздер: *Еуразиялық экономикалық одақ, интеграциялық процестер, тауарлардың бірыңғай нарығы, өзара сауда, ішкі нарық, сыртқы сауда, өзара саудадағы теңгерімсіздік, сауда құрылымы, экспорт, импорт.*

Ключевые слова: *Евразийский экономический союз, интеграционные процессы, единый рынок товаров, взаимная торговля, внутренний рынок, внешняя торговля, дисбаланс взаимной торговли, структура торговли, экспорт, импорт.*

JEL classification: F15, F19, F40

Introduction. Under the conditions of slow global economic growth, geopolitical tensions and high turbulence on international financial markets in different regions of the world, mutually beneficial areas of cooperation and various forms of economic integration united on a regional basis with common interests and development goals of individual states in the international arena become a priority. In this connection, integration in trade is especially relevant, as it allows the member states of integration processes to realize competitive advantages in the markets and accumulate resources to achieve similar and close national priorities at the lowest cost. Thus, in Kazakhstan, trade is the key economic sector

after the oil and gas sector and shows one of the fastest growth rates compared to other sectors of the economy, while in more developed integration groupings, such as the European Union, the Eurasian Economic Community, and the Eurasian Economic Community, trade is the key sector in the economy.

The Eurasian Economic Union (EAEU) deserves special attention, which was established on 29.05.2014 after the signing of the 'Treaty on the Eurasian Economic Union' and is an international organization of regional economic integration. Currently, together with Kazakhstan, the EAEU includes Armenia, Belarus, Kyrgyzstan and Russia. As of 1 January 2021, Kazakhstan took over the

Менеджмент және маркетинг / Менеджмент и маркетинг

presidency of the EEU bodies.

In general, extensive work has been carried out to form a Union with common rules of movement of goods, capital services, and labor resources. They were the Agreement on free trade zone (1994), the Agreement on the Customs Union (1995), the Treaty on the Customs Union (1999), the Treaty on the Common Economic Area (1999), establishment of the Eurasian Economic Community (2000), the Agreement on a common customs territory and formation of a customs union (2007), the Treaty on the Eurasian Economic Commission (2011), and others. However, in the first two years of the EAEU's existence, there was a noticeable reduction in mutual trade due to the fall in global commodity prices, the imposition of anti-Russian sanctions and Russian counter-sanctions, which could not but affect Kazakhstan's mutual trade with the EAEU countries: the volume of mutual trade in 2016 compared to 2015 decreased by 15.5% [1].

Purpose and objectives of the study.

The purpose of this paper is to analyze the dynamics and structure of Kazakhstan's mutual trade within the EAEU and to reflect on the significance of the development of a single market for goods for the national economy. The following tasks were set and solved in order to achieve this goal:

- analyze statistical indicators of foreign trade turnover of Kazakhstan with EAEU member-states for 5 years of operation;
- analyze the structure of Kazakhstan's bilateral trade with the EAEU member states in dynamics;
- determine the prospects of development of mutual trade of Kazakhstan within the EAEU taking into account the index analysis of mutual trade indicators.

Material and method. The theoretical basis for this study is the works of domestic and foreign scholars on the impact of integration processes on mutual trade and foreign trade turnover of EAEU member states.

The information base of the study includes legal acts and documents regulating integration processes and trade issues in the EAEU countries, including Kazakhstan. Statistical data and data from analytical documents of the Eurasian Economic Union, the Eurasian Development Bank and other international organizations, the Committee on Statistics of the Ministry of National Economy of the Republic of Kazakhstan and other state statistical agencies (Belarus, Armenia, Kyrgyzstan, Russia) were used.

The methods of system analysis and synthesis, structural-logical, economic-statistical, comparative and retrospective analysis of the study of economic processes are the methodological basis of the study.

Literature review. Scientific works by Kazakhstani and other researchers, including monographs, articles from periodicals, etc., carried out within the framework of research institutes and individual authors were studied. The reports of international organizations, EAEU regulatory documents and analytical reports, reports of the Eurasian Economic Commission and the Republic of Kazakhstan dedicated to Eurasian integration, foreign trade cooperation and analysis of mutual trade have been reviewed and analyzed.

Various scholars have studied the formation and development of the EAEU. Researchers pay close attention to the issues and problems of integration impact on trade cooperation of EEU countries and a lot of publications are devoted to them. For example, A. A. Migranyan notes that mutual trade affects "qualitative parameters of the national economy (stimulation and growth of industrial production, development of technology and increase in the share of added value in exports). [2].

According to Z. Shaukenova, Director of the Kazakhstan Institute for Strategic Studies (KAZISS) under the President of Kazakhstan, the EAEU creates "favourable conditions for the member states to achieve synergy, both

from foreign economic activity and internal economic processes.[3] V. Dodonov states that "the benefits of mutual trade can be judged by the fact that it is growing, and quite dynamically" [4].

A number of researchers focus their attention on the results and prospects of economic cooperation. Among them are the works of S.M. Glazyev [5], V.V. Arkhipova [5], Ageyev A.I. [5], Obolensky V.P. [6], Ushkalova D.I. [7], Migranyan A.A. [2], Dodonov V.Y. [4], Vardomsky L.B. [8], Litvinov A.I. [9], Sudakov Y.M. [10], Thun V. [11], Urzhumtseva T.B. [11], Alpysbaeva S.N. [12], Shuneev J.Sh. [12], Temirova A.B. [13], Abdimomynova A.Sh.

Main part. Despite the decline in trade

turnover in 2016, the situation with mutual trade in the EAEU as a whole began to improve as a result of intensive work on internal and external directions in 2017. According to the Eurasian Economic Commission (EEC), the mutual turnover of trade in goods between EEU countries in 2015-2019 increased by 33.8% and reached USD 61634.0 million in 2019 (Table 1). In 2019 (Table 1).

It should be noted that the increase in the value of mutual trade in goods between the EAEU member states is slowing down, but maintaining a positive trend. The value of exports of EAEU member states in mutual trade increased by 1.28% compared with 2018. In 2018, there was a slowdown in the dynamics of mutual trade across the EAEU as a whole.

Table 1

Dynamics of the total volume of mutual trade in goods between EAEU member countries*

	2015	2016	2017	2018	2019
Mutual trade volume, mln USD	45 615,7	42 960,3	54 711,6	60 261,5	61 634,0
Growth rate, %	-	94,18	127,35	110,14	101,28

* Compiled by the author on the basis of the source [14]

Compared with 2018, the share of mutual trade in 2019 in total EAEU foreign trade increased from 13.7% to 14.3% (Figure 1). The development of mutual trade in goods took place in the context of moderate economic

growth in the EAEU countries: GDP across the Union increased by 1.7% in 2019. In January 2020 the share of the Union's mutual trade was 12.9% of total EAEU exports.

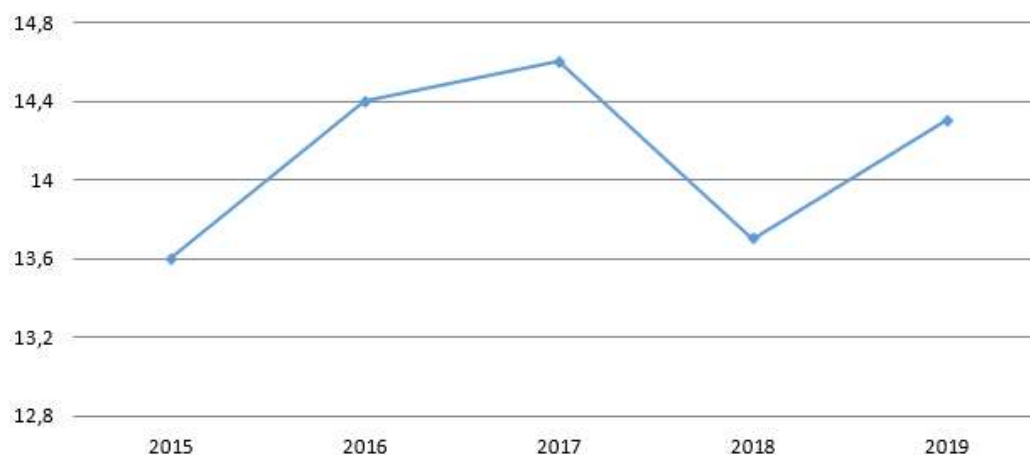


Figure 1. **Share of reciprocal trade in total EAEU exports between 2015 and 2019***

*Compiled by the author based on the source [14]

Consider the situation for Kazakhstan's export-oriented economy within the EAEU. Kazakhstan's share of exports to the EAEU market was 10.4% of total mutual exports in 2019. The share of imports was 24.7% of the total volume of goods offered.

Table 2

Volumes of mutual trade of the Republic of Kazakhstan with the EAEU countries (mln USD)*

	2015		2017		2019		2020	
	export	import	export	import	export	import	export	import
TOTAL	4886,8	10893,4	5262,6	12518,2	6406,2	15297,4	5671,9	14708,5
Armenia	0,7	3,9	5,6	5,0	4,4	7,1	6,4	7,8
Belarus	47,7	472	101,2	531,7	106,8	662,5	77,3	664,9
Kyrgyzstan	495,0	185,1	516,7	248,5	624,1	315,7	581,0	267,6
Russia	4343,4	10232,4	4639,1	11733	5670,9	14312,1	5007,2	13768,2

**Statistics of foreign and mutual trade of the countries of the Eurasian Economic Union. Official Internet resource of the Eurasian Economic Commission*

In 2020, Kazakhstan's trade turnover between EAEU countries decreased by \$1,323.2 million compared to 2019. (Table 2). Kazakhstan's mutual trade with the EAEU countries changed sufficiently over the study period: from \$15780.2 million in 2015 to \$20380.4 million in 2020, with an increase of 22.6%. The growth in mutual trade is mainly due to an increase in imports, which causes a trade deficit. Over the examined period, the imbalance rose from \$6006.6m to \$9036.6m. Imports amounted to - US\$14708.5 million, up 14.9% from 2017 and 25.9% from 2015. Exports to EAEU countries in 2020 amounted to USD 5671.9 mn. This is 7.2% more than in 2017 and 13.8% more than in 2015.

Kazakhstan's foreign trade turnover increased due to an increase in the volume of trade of all EAEU countries, except for Armenia in 2019 due to lower shipments of flat-rolled iron, unalloyed steel bars, chocolate, tobacco and tobacco products, and telephone sets. Nevertheless, trade turnover between Kazakhstan and Armenia increased by 19% in 2020.

The main trade partner of Kazakhstan in mutual trade has been and remains Russia with a share of 92.1% in trade turnover with the Republic of Kazakhstan: 88.5% of Kazakhstan's exports to the single market and

93.6% of imports in mutual trade. The volume of mutual trade with Russia in 2019 increased by 22.1% compared to 2017. The increase in exports was mainly due to higher supplies of precious metal ores and concentrates, iron ores and concentrates, unprocessed zinc, copper and flat-rolled unalloyed steel. Imports rose due to increased purchases of welded and riveted pipes, passenger cars, zinc ores and concentrates, non-self-propelled railway or tram cars, tobacco and tobacco products.

The volume of Kazakhstan's exports to the EAEU market increased by 5.9% due to a 14.1% (39% of Kazakhstan's total exports in mutual trade) increase in mineral products, a 3% (14.3%) increase in chemical products, a 7.4% (10%) increase in food products and agricultural raw materials and a 37.1% (8.2%) increase in machinery, equipment and transport vehicles. In contrast, the indicator fell by 9.6% (26%) for metals and metal products.

Manufacturing companies accounted for 44% of the country's exports in mutual trade and 29% of imports. Intermediary traders accounted for 64% of imports on the EEU market and 22% of exports [14].

Index analysis of Kazakhstan's mutual trade indicators shows that it is balanced, both in terms of increasing value volumes and

the commodity mass of exports and imports (Table 3). Export and import growth are characterized by similar values: 6.4% and 6.7% respectively. Price trends since 2017 are not in

favour of the Republic, but they are positive: in 2018 the corresponding index was 85.9% and in 2020 it will be 97.9%.

Table 3

Index characteristics of foreign trade activity of the Republic of Kazakhstan*

	2016 in % to 2015	2017 in % to 2016	2018 in % to 2017	2019 in % to 2018	2020 in % to 2019
GDP volume index (at constant prices)	101,2	101,1	104,1	104,5	97,4
Reciprocal trade with EEU countries					
Export					
value index	71,6	76,5	133,9	114,9	105,9
average price index	78,8	89,9	105,7	104	99,6
volume index	90,8	85,1	126,7	110,5	106,4
Imports					
value index	74,9	86,2	126,9	112,6	108,5
average price index	85,9	105,5	123	106,4	101,7
volume index	87,3	81,8	103,2	105,8	106,7
Mutual trade conditions index with EAEU countries					
price	91,7	104,1	85,9	97,7	97,9
gross	104	76,5	122,8	104,4	99,7

**Note: Statistics of foreign and mutual trade of the countries of the Eurasian Economic Union. Official Internet resource of the Eurasian Economic Commission*

The data in the table shows the positive effect of Eurasian integration on Kazakhstan's national economy. Until 2018, there is a noticeable increase in foreign trade turnover with the EAEU countries and a gradual increase in real GDP.

However, the situation with coronavirus infection (COVID19) led to stagnation of the economy and reduction of foreign trade turnover. According to 2020 results, economic growth in Kazakhstan was -2.6%. Due to quarantine measures in January-June 2020, mutual trade of Kazakhstan with EEU countries fell by 11%. At the same time, Kazakhstan's exports to the EEU countries fell by 20% to USD 2.3 bn. Kazakhstan's exports to the EEU countries fell by 20% to \$2.3bn, while imports fell by only 7% to \$6.3bn. AS A RESULT, KAZAKHSTAN'S EXPORTS TO EEU COUNTRIES FELL 20% TO \$2.3BN, WHILE IMPORTS FELL ONLY 7% TO \$6.3BN. As a result, in the first half of 2020, Kazakhstan's net exports with the EEU

countries were negative in the amount of \$4 billion. During that period, Kazakhstan had to reduce its supplies of minerals by 16.2 per cent, metals and metal products by 5 per cent, and foodstuffs and agricultural raw materials by 9.6 per cent.

Therefore, special attention is now being paid to developing modern trade and increasing the competitiveness of export goods and services: anti-crisis measures to support business, the launch of a programme to digitalize trade and a single export portal export.gov.kz, removing technical barriers to trade, applying common standards in the EAEC, increasing non-resource exports and much more.

Conclusion. In the changing world situation, the economic and geopolitical importance of Kazakhstan's membership in the EAEU is increasing. Increased competition in the EAEU market is the main achievement of Eurasian integration. Analysis of the dynamics of Kazakhstan's mutual trade with the EAEU

countries for the period from 2015 to 2020 gives grounds to draw the following conclusions:

- In general, the nature of development of the dynamics and structure of Kazakhstan's foreign trade states the growing importance of trade relations of the republic with EAEU partners;

- Commodities dominate in exports; at the same time non-resource exports are growing, which increases the competitiveness of Kazakhstani producers in partners' markets;

- The positive effect of integration is demonstrated by the fact that the growth rate of exports to EAEU countries exceeds the rate of exports to third countries;

- Kazakhstan remains a net importer in trade with the EAEU countries; the trade defi-

cit increased by 48% in mutual trade with the EAEU countries;

- Despite the negative consequences of the epidemiological situation on coronavirus and quarantine measures in 2020, foreign trade is projected to grow by 3.2% in 2021.

Thus, free trade in the EAEU common market contributes to the growth of Kazakhstan's mutual trade with EAEU countries and has a positive impact on the development of the national economy. Nevertheless, to build up positive macroeconomic effects, Kazakhstan needs to stimulate trade and increase the level of competitiveness of Kazakh products, strengthen efficient and flexible supply chains, change the product structure of exports and expand production interaction.

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Б. Уразымбетов

ҚАЗАҚСТАННЫҢ ЕАЭО АЯСЫНДАҒЫ ӨЗАРА САУДАСЫ

Аңдатпа

Осы мақалада еуразиялық интеграцияның Қазақстан экономикасына әсер етуінің негізгі нәтижелері, атап айтқанда 2015-2019 жылдар аралығындағы өзара сауда-саттық талданады. Құрылымдық талдау жүргізіліп, динамиканың негізгі үрдістері мен факторлары, Еуразиялық экономикалық одақ шеңберінде Қазақстанның экспорты мен импортының тауарлық құрылымы келтірілді. Қазақстанның ЕАЭО-ға қатысушы елдермен өзара саудасындағы интеграциялық әсерлерге бағалау жүргізілді.

Зерттеу әдістері: динамикалық қатарларды салыстырмалы талдау, құрылымдық-логикалық, экономикалық-статистикалық, салыстырмалы талдау.

Жүргізілген талдау нәтижесінде Қазақстанның ЕАЭО елдерімен ынтымақтастығының көптеген салаларында озыңқы динамика байқалғаны туралы алдын ала қорытынды жасауға болады. ЕАЭО-қа қатысушы елдер арасындағы өзара саудаға салыстырмалы талдау жүргізу барысында коронавирус пандемиясының Еуразиялық экономикалық одақ мемлекетінің, оның ішінде Қазақстанның экономикалық белсенділігіне айтарлықтай әсер еткені анықталды. ЕАЭО жұмыс істеу кезеңінде Қазақстанның өзара саудасындағы теңгерімсіздік үрдісі анықталды, бұл әлсіз әртараптандыруды және салаішілік маңыздылықтың төмендігін және Республиканың халық-аралық нарыққа тәуелділігін көрсетеді. Тиісінше, бұл ЕАЭО шеңберінде Қазақстанның Ұлттық экономикасы үшін теріс әсер етуі мүмкін.

Б. Уразымбетов

ВЗАИМНАЯ ТОРГОВЛЯ КАЗАХСТАНА В РАМКАХ ЕАЭС

Аннотация

В настоящей статье анализируются основные результаты влияния евразийской интеграции на экономику Казахстана, в частности взаимная торговля за период с 2015 по 2019 годы. Проведен структурный анализ и приведены основные тенденции и факторы динамики, товарная структура экспорта и импорта Казахстана в рамках Евразийского экономического союза. Проведена оценка интеграционных эффектов во взаимной торговле Казахстана со странами-участницами ЕАЭС. Методы исследования: сравнительный анализ динамических рядов, структурно-логический, экономико-статистический, сравнительный анализ. В результате проведенного анализа можно сделать предварительные выводы о том, что в большинстве сфер сотрудничества Казахстана со странами ЕАЭС наблюдалась опережающая динамика. В ходе проведенного сравнительного анализа взаимной торговли между странами-участницами ЕАЭС выявлено, что пандемия коронавируса ощутимо ударила по экономической активности государства Евразийского экономического союза, включая Казахстан. Выявлена тенденция дисбаланса взаимной торговли Казахстана в период функционирования ЕАЭС, это демонстрирует слабую диверсификацию и низкую внутриотраслевую значимость и зависимости республики от международного рынка. Соответственно, это может иметь негативное влияние для национальной экономики Казахстана в рамках ЕАЭС.

