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ON PREREQUISITES FOR DEVELOPING IMPORT SUBSTITUTION IN METALLURGY IN RUSSIA

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Аннотация. Актуальность вопросов импортозамещения в российской экономике обусловлена тем, что развитие конкурентоспособного производства в современной геополитической ситуации является необходимым условием обеспечения стратегической безопасности страны. Исследованы организационные и финансовые условия импортозамещения продукции металлургической отрасли, обозначены проблемы развития замещения импорта металлопродукции на современном этапе.

Ключевые слова: импортозамещение, металлургическое производство, инвестиции, конкурентоспособность.

Abstract. The topicality of the import substitution issues in the Russian economy is determined by the fact that the development of competitive production in the modern geopolitical context is a necessary condition to provide strategic security of the country. The organizational and financial conditions for import substitution of metallurgical industry products are studied; the current problems in developing import substitution of metal products are identified.

Key words: import substitution, metallurgical production, investments, competitiveness.

Import substitution in the Russian industry on the whole and in the metallurgy industry in particular is far from being a new topic. In 2007 at the meeting devoted to import substitution issues in iron and steel metallurgy, Andrei Dementev, the deputy minister of the RF Ministry of Industry and Energy, pointed out that the highly processed products, such as flat rolled products, rods and steel pipes, had the main share in the structure of the Russian import of

ferrous metals [1]. He also outlined the measures aimed to develop the import substitution productions in iron and steel metallurgy in Russia, including

- coordinating the development plans for the mining and metal production sector enterprises with the general schemes of electric power industry facilities location, for the development of pipeline transportation and railway system, with the strategies for the development in other industries and regions of Russia;
- improving the competitiveness of metal products;
- improving the conditions for railway transportation of mining and metal products;
- decreasing the import customs duties on technological equipment for the metallurgical industry not manufactured in the Russian Federation;
- promoting the investment and innovation activities of enterprises and so on.

In the ten-year period since this meeting we have certainly expected to see clear evidences of how the import substitution with the domestic metal products can create the prerequisites for the dynamic development of the metallurgical industry and become a growth driver for the Russian economy on the whole.

However, the data in Table 1 illustrate rather weak positions of the Russian manufacturers on the domestic market in such segments as coated flat rolled products (galvanized, polymeric), stainless rolled products and stainless pipes.

Table 1 – Import share in iron and steel metallurgy products in 2014 [Based on 2]

Product / technology	Import share consumed, %
<i>Corrosion-resistant rolled products</i>	
Corrosion-resistant rolled bars	33
Corrosion-resistant flat rolled products	86
<i>Corrosion-resistant pipes</i>	
Corrosion-resistant seamless tubes, including hard-wrought heat resistant pipes for high pressure compressors and for nuclear power stations; seamless thin-walled tubes	100
Corrosion-resistant electric-welded tubes	47

<i>Steel tubes from oil-gas assortment</i>	
426-762 mm diameter casing pipes with urethane-foam isolation	100
508-914 mm diameter casing pipes for standpipes with screwed and lock joint connectors	100
Pipes for oil and gas extraction (casing, pump compressor, drilling) with premium screws, including nickel-chromium alloy based pipes	30
<i>Coated rolled products</i>	
Coated rolled products	30

The dynamics of investment rates into the capital assets in metallurgy and tariff indices on freight railway transportation (Table 2) does not prove the implementation of the measures identified by the RF Ministry of Industry and Energy in 2007 and aimed at solving the import substitution problems in metallurgy. Certain growth of investment rate into the capital assets in metallurgy was observed in 2011-2012; after that the investment activity fell again. The tariffs on the railway transportation rose more than twice in the period under review.

In many developed countries the epoch of industrial development was followed by the epoch of innovative development with the leading role given to high technologies, knowledge and services. As for the Russian Federation, active construction of postindustrial innovative economy and creation of nationwide innovation systems resulted in the loss of many of its own productions.

Table 2 – Dynamics of investment rates into capital assets in metallurgy and tariff indices on freight railway transportation in 2008-2015 [Based on 3]

Indicator	Indicator value by year							
	2008	2009	2010	2011	2012	2013	2014	2015
Investments into capital assets in actual operating prices, bln rubles	259.3	219.2	185.8	208.9	220.0	207.0	205.1	not given
Indices of railway tariffs on railway transportation over the RF, % to previous year	122.14	110.59	109.39	107.46	105.56	105.44	102.29	112.9

Significant state dependence on imports together with the weakening of the national currency in 2014-2015 and the worsening of the geopolitical situation, made the authorities again shift the focus of their attention to the production renovation over the country's territory. At the end of December 2014, the Federal Law "On industrial policy in the Russian Federation" (№488-FZ as of 31 December 2014) was passed, specifying the main goals in industrial policy as follows:

- persuading industrial enterprises to use material, financial, human and natural resources rationally and effectively, to increase labor efficiency, to implement import substituting, resource saving and ecologically friendly technologies;
- increasing product output with a large share of added value and supporting the export of these products;
- supporting technological re-equipment of industrial enterprises, updating basic production assets ahead of their becoming obsolete;
- providing technological independence of the national economy etc.

Three-party investment contracts signed up to 2025 between the federal authorities, regional executive authorities and investors were the key idea of this law. These contracts state that an investor is liable to produce a particular volume of goods, while the state guarantees the invariability of the business terms for the investor (taxation rate, land prices, etc.).

The law also introduces tax incentives and different preferences for integrated projects, the possibility to apply accelerated amortization of the Russian equipment, new subsidizing principles for scientific research projects, conditions for repayment financing of long-term loans and development of the National Industrial Information System to monitor industrial production and to construct the system of industrial balances.

In April 2014 the RF Government Resolution №328 introduced the state program of the Russian Federation "Development of industry and its competitiveness" with the key indicators of RF industry development up to 2020 being identified as follows:

- growth of industry production index up to 134.6% to the 2011 level;
- increase of high-performance jobs by 8-10% per year;
- increase of labor efficiency index by 4-5% per year;
- growth of investments into capital assets by 6-8% per year.

Subprogram 10 “Metallurgy” of the abovementioned state program supposes the decrease of import share in the domestic consumption of the finished rolled products of ferrous metals by 40% up to 2020.

Order No.652 as of 31.03.2015 of the Ministry of Industry and Trade of Russia “On the approval of the action plan on import substitution in the Russian iron and steel metallurgy” states the expected by 2020 decrease of import share in stainless pipes, steel pipes of oil and gas assortment, coated rolled products, ferrous alloys, castable refractory, flux, metalware and stainless rolled products (including rolled bars by 18% and flat rolled products by 49%).

The analysis of these documents reveals that nearly all proposed measures of import substitution and industry development are of organizational and legal nature and are not supported financially.

Only one financially oriented measure could be mentioned – the organization of Industry Development Fund (IDF), which was allocated 24.6 bln rubles for concessional financing of import substitution at the end of 2004. The Fund deals with giving loans to investment projects of industry enterprises at the rate of 5% and more per annum, among many other activities. However, the total volumes of financing are not enough to develop one sector of manufacturing industry. The first year of IDF work brought 1282 applications with the overall preferential carry financing of 449 bln rubles [4].

The ministry documents state that the next step in import substitution in the national industry is going to be competitive product substitution provided by the Russian enterprises. The research works carried out by a group of authors in 2012-2015 [5-8] analyzed the possible alternative localizations of import substituting productions on the territory of Russia. The proposals for the production of thick plates and large-diameter pipes, cold-rolled galvanized

sheets and polymer coated sheets at the premises of *EVRAZ ZSMK plc* within a metallurgic cluster in Kemerovo Oblast were prepared.

However, the economic situation both in the region and in the country does not favor the fact that local manufacturers, including *EVRAZ*, have the right potential and investment opportunities to develop import substitution. For example, over the last years, metallurgy and metalworking production have been close to stagnation. In January 2016 the metallurgic production and production of finished metal goods comprised 93.5% to the corresponding period of 2015, including 93.8% of metallurgic production and 92.5% of the production of finished metal goods [3].

The negative dynamics of production was determined by the fall in demand for the goods from the Russian enterprises, which, in turn, could be explained by the decline in financial resources availability for the consumers of these goods. Very low cost efficiency of the production does not allow the enterprises to update their capital assets (for example, the cost efficiency of *EVRAZ ZSMK* goods in 2012 was 3.5% against 3% in 2010).

The increase of the loan market interest rate up to 15-17% per annum made a loan unaffordable for many initiators of investment projects. Manufacturers' hopes for the interest rate decrease force them to freeze the capital asset investment programs.

The RF Government Resolution of 5 February 2015 approved a list of 199 strategic enterprises which can rely on state support aimed at strengthening the Russian economy and at eliminating the negative consequences from possible crisis events [9]. The document includes holdings and vertically integrated companies with their profits comprising 70% of the aggregate national income and with their workforce comprising 20% of the overall number of the employed population in the economy. At the same time the document points out that being in the list does not guarantee state support. The implementation of the restructuring programs and efficiency increase at the candidate enterprises are the grounds for the state support to be provided. So, here is a vicious circle: the enterprises need state support to produce more competitive goods and to

increase their performance efficiency, while to receive this support they are required to implement the measures aimed at restructuring and increasing their efficiency.

The choice of the enterprises on the list is also rather surprising: about a third of the companies on the list are established with foreign capital participation (and, as a rule, located in offshore jurisdiction), thus, they can use the support from the state not for the production development needs in Russia. The data of the Central Bank of the Russian Federation show that every year huge sums of money are moved out of the country (as investments into foreign assets or as capital outflow). For example, 151 bln dollars were taken away in 2014, which is about 7.85 trillion rubles at the operating exchange rate at the end of 2014 (11.1% GDP or 55.9% of the 2014 federal budget expenditure). All this money could have been invested into the development of the Russian industry.

At the same time those industrial enterprises that are the important consumers of high processed metal products comprise only 10% on the list. The great number of the largest national oil and gas producers in this document illustrates the fact that it is the resource giants rather than manufacturing industry that will be supported by the government. Considering the fact that the Russian economic policy is oriented at decreasing government expenditures, one can expect that the overall volume of financial help from the state to the manufacturing sectors will be significantly cut.

It is obvious that with no financial support the import substitution will die in the womb. In the context of the present strict monetary policy, unavailability of loan resources and foreign investments for the industrial enterprises, one can speak only about isolated signs of production growth due to import substitution.

With regard to rather limited opportunities of domestic capital accumulation, one can not expect widespread investments in the development of import substituting productions in the nearest years. Along with that, it should be noted that investors are normally interested in the industries and projects bringing the largest profits and capital return rate, while high technology productions hardly meet these requirements. A comparatively balanced production growth can be

achieved through the projects connected with updating the operating capacities rather than building the new ones.

Yet, the measures declared by the government and aimed at import substitution development can not but raise some fears. First of all, no competition from the overseas manufacturers may negatively affect the attempts of the Russian enterprises to develop innovations, to increase the competitiveness of their products, and finally may result in overall dependence of some companies on state subsidies. Secondly, import substitution policy may add to the corruption growth, since the implementation of the approved state program with the subsidies to particular production spheres does not exclude the possibility of “non-market” principle prevalence in making decisions by the authorities in charge.

Since import substitution is a state strategy, the government role in its implementation is very important. Together with comfortable, attractive conditions for investors, it is quite reasonable to nurture domestic demand from the state side – widespread placement of state orders at industrial enterprises, giving preferences to the suppliers of Russian goods in the execution of these orders.

In conclusion, we should point out that import substitution process is difficult and time-consuming, that is why to solve the burning issues of the country’s economic development it is important to move from program statements over to practical deeds. It is necessary to start implementing industrial development projects (first of all, in the provinces) and to unite the efforts of state bodies with the efforts from business structure representatives, experts, scientists. This will help to stop the mass exodus of youth and professionals from the provinces and to breathe new life into industry.

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