

PROBLEMS AND PROSPECTS OF INNOVATIVE DEVELOPMENT WITHIN THE WTO AGRICULTURAL MACHINERY IN RUSSIA

The article bases the necessity of the technical modernization in agriculture, reveals the risks of the functioning of the agricultural machinery enterprises in Russia. On the basis of the example of the "Rostselmash Company" (Southern Federal District) the problems are analyzed and the prospects of the development of this basic industry for the regions of the South of Russia within the frame of the realization of the requirements of the World Trade Organization, the member of which Russia became in 2012 are presented.

Keywords: agricultural machinery, South of Russia, WTO, specialization, "Rostselmash", risks, costs, innovations, state support, modernization.

Problems setting. Russia is the member of the World Trade Organization and it is an accomplished fact. The specificity of the economic complex of Russia consists in the fact that numerous industries, coming within into the risk group are localized in a small number of regions where they are the most important specialization industries. As a result of Russia's joining the WTO in the regions and the municipalities where the most vulnerable industries are concentrated there exists a high probability of the production contraction as a result of the increased competition and contraction of the production that can lead to negative social consequences – unemployment growth, lowering of the population incomes, reduction of the tax inflows into regional budgets and, consequently, to the reduction of the state expenses for the education, healthcare and social security of the population.

Brief Literature Review. Current issues associated with analysis of riskovi and assessment of the prospects of development of the economic complex of Russia, reflected in the works of such researchers as: A. Altukhov, V. Andrianov, N. Baikov, N. Beketov, G. Vechkanov, S. Glaziev, O. Davidkova, A. Danilychev, I. Kuznetsova, N. Liventsev, V. Obolensky, A. Subaeva and other.

The generalization of the results of these studies allowed the authors to draw the following conclusions. Membership in WTO inevitably activates the development of the largest part of the manifestations of the globalization processes, foreign trade turnover, inflow of foreign investments and so on. For the so called "opened" regions, included into the world trade (mainly export oriented and transit ones, that enclose less than one forth of the subjects of the

Russian Federation and one third of the population of the country) the WTO joining did not change anything (except Moscow and Saint Petersburg in which the most developed industries are banking and insurance business that are included into the risk group) [1; 2].

It is especially complicated to forecast the impact on the "half opened regions" where in the row with some export productions the import substituting enterprises remained. The "closed regions" are presented by almost one third of the subjects of the Russian Federation having the specialization on the import replacing industries: machine construction, food industry, light industry.

Regions with a diversified structure of the economy are more viable and the most favorable situation for them is the combination of several export industries with dynamically growing import substituting industries. The structure represented by noncompetitive industries of the import substitution is less favourable.

The reduction of the taxes on the industrial production has had a painful impact on the largest part of the industries of the regions of South of Russia excluding the primary industries of low production level. The reason consists in the fact that the largest part of the industrial enterprises of the Southern Federal District and other regions of the country work at a low profitability and the largest part of them (especially in mono cities that have only one industry of specialization) are unprofitable and are literally surviving due to the state assistance (subsidies, preferences, loans repayment, debt amnesties and so on). The reduction of customs duties for foreign competitors and the absence of the availability of the state support under the conditions of the WTO joining can lead during the





following three years to a bankruptcy of 30–40 thousand industrial enterprises throughout the country. The mandatory rise of the internal prices for energy and primary resources at the moment of joining the WTO will catalyze this process. The mono cities of the Southern Federal District in the nearest future can become zones of a large scale social and economic disaster [3; 4; 5].

Purpose article. The authors, based on the collected factual aim was to evaluate both the current base for the regions of Southern Russia in the field of agricultural machinery, and to determine the direction of its development in terms of the norms of the world Trade Organization, the member of which Russia became in 2012 are presented.

Basic material research. Tendencies of the development of the agricultural machinery in Russia in 2012 – 2013 can be presented by the following data. By mid 2012 the share of national producers of the agricultural machines in the internal market reached 50% that was mainly determined by the mechanism of funding the interest rates in loans for acquiring the Russian industrial equipment at the discount rate determined by the Central bank.

The improvement of the material and technical basis is one of the most important elements contributing to the modernization of the production processes in the agricultural complex. However the solution of this strategic problem is not on the proper organizational level that in general deprives the local agricultural industry the basis of the stable functioning at the moment of its active and menacing deindustrialization. The gap in many technical and economic indices in many subindustries of the Russian agriculture in comparison, for example with the USA reaches 50 years [13, p. 38]. The solution of this problem acquires specific importance in connection with Russia's participation in WTO. In the industry the duty on the entry of new import harvesters has been reduced by 3 times and the duty for the used up agricultural machines went down by 5 times. At the same time the import of the foreign agricultural machinery will be accompanied by the accessibility to all the allowed types of subsidies.

The overall results of 2014 prove that the market of the agricultural machinery in the Russian Federation made up 133,1 billion rubles, the output for one worker made up 144,6 thousand rubles, export was about 200 million US dollars, import 2,576 billion US dollars.

Judging from the level of mechanization Russian agricultural producers yield so far to their colleagues from the leading countries. So, the share of the machines with the period of the exploitation of more than 10 years makes up 60%, the number of crop harvesters that are used more than 10 years is 50% and the forage harvesters make up 45% [6].

The economic situation of the agricultural machine construction is influenced by a number of factors, underestimation of which leads to the reduction of the competitiveness of the production and the services rendered. Under modern conditions Russian agricultural machine construction is characterized by an unstable character and a very low profitability of the production that is due to a low demand for the machines of agricultural producers.

Today the key players in the market of the agricultural machines among national companies are the harvest constructing company "Rostselmash" (construction of crop and forage harvesters, trailer and hinged agricultural machines, agricultural tractors), "Company "Tractor factories" (KTZ) (construction of the crop and forage harvesters, trailers and hinged agricultural tractors), as well as "Petersburg tractor factory" (construction of agricultural tractors with the engine having the capacity of more than 250 horsepower). The mentioned companies have the rate of localization up to 92%.

At the same time Russia does not practically have a true assembly production of foreign types of agricultural machines except "Claas" (Southern Federal District, Krasnodar), "John Deere" (Domodedovo, Moskovskaya oblast), as well as the companies with a high rate of localization: "Kolnag" (Kolomna), "Evrotechnica" (Samara) and "Agro" (Kemerovskaya oblast). Other international companies "CNH", "AGCO", "SDF" having the assembling production on the territory of Russia, and the level of localization does not exceed 5–10% [7].

The main factors, limiting the investment activity of Russian enterprises of the agricultural machine construction are the following: high overall costs that make up 80% of the production value and a low marginal profit.

Marginal profit obtained from the release of the agricultural machines by Russian enterprises and its volume does not allow national companies obtaining a high level of investments, necessary for a sustainable and innovative development. Thus the total volume of investments of the largest Russian companies

("Rostselmash" and Company "Tractor factories" (KTZ)) is 60 lower than that the company "John Deere" has. The largest part of investments the enterprises assign to buying capital and circulating assets that shows a high rate of the physical and moral wearing out of the production facilities, buildings, infrastructural objects and the priorities of their renovation for factories and also proves the stability of the demand, seasonal market and low sales profitability.

Investments into R&D activity occupy the third rang in the priorities of the companies (they assign only 12% of their investments into this sphere). 90% from these investments are spent by "Rostselmash" and Company "Tractor factories" (KTZ). Analysis of the foreign experience proves that the main part of investments (more than 50%) is assigned to R&D. Due to this fact the largest world producers manage to occupy confident position at export markets and successfully compete with local producers of the agricultural machines.

Under the conditions of the WTO the mechanism of the funding of credit interest rates for buying the Russian machines at the level of the discount rate determined by the Central bank targeting the import substitution remains uncertain. Other mechanisms concerning the demand encouragement are presented by subsidies to peasants for the purchase of the machines from the national production, subsidies for the technical reequipment destined to the enterprises of agricultural machine construction as well as other subsidies can also be cancelled as they do not correspond to the WTO regulation.

The agreements achieved by the WTO and Russia anticipate the reduction of import duties practically for the whole list of the agricultural machines including tractors, crops and forage harvesters) from 15% in average up to 5–10%. This situation will allow foreign producers to foresee this gap in the price of the production that will lead to a five fold import growth.

In accordance with the opinion of some experts, the reduction of the prices for the imported machinery will entail their decrease for Russian machines as well as the profitability of their production is not high [8, p. 34]. Other researchers think that Russia under the pressure of the countries members of the WTO will have to increase the prices for the energy products (this is the main requirement of the European Union) that in its turn will be reflected on the agricul-

tural machine construction meaning the rise of prices for the machines that will make its price competitiveness lower. Only in some types of the machines there exist transitory periods for 2 or 4 years.

Judging from some forecasts the market of the agricultural machine construction in 2020 will make up 65 thousand items among them 60 thousand items are only imported ones and only 5 thousand machines fall at local enterprises. The volume of the market of harvesters will make 9,2 thousand items and 8 thousand items among them fall at the import. Taking into account the hanger and other types of the equipment the market will overcome 101 billion rubles and the imported production are assessed at the amount of 81,7 billion rubles and the local national enterprises will sell the production for 20 billion rubles.

In other opinions the market share of Russian machine constructionists by the end of 2020 can drop down to 15–20%.

Taking into consideration the forecasts of the Ministry of Production and Trade of the Russian Federation, Ministry of Agriculture of the Russian Federation by year 2020 Russian producers will control about 60% of the market under the condition of the demand promotion and the increase of localization level of production by the enterprises with foreign investments. However specific patters of the initiation have not been developed so far. It is supposed as well that an additional impulse to the development of the agricultural machine construction will give the export that will be able to adsorb about ½ of the output [8; 9].

The requirement of the standardization and technical regulation in accordance with the WTO norms will allow to Russian companies increasing the level of competitiveness thank to harmonization and introduction of international standards.

As a means of the state concerning the protection of its national productions some researcher suggest the following: to give loans to the industrial enterprises by means of the refinancing commercial banks and on security of industrial firms; to use actively protection measures (using the example of China); to use the delay in the market opening (up to 8 years).

At the presence of evident risks one of the tasks of the realization of the "Strategy of Development of Agricultural Machine Construction of Russia up to year 2020" consists in the provision of the creation of the national compet-





itive examples of the agricultural machinery, responding to the most contemporary requirements of the exploitation, used agricultural technologies, labour safety by means of promotion of innovative development of the industry and investments in R&D. For its achievement it is necessary:

1) to renew and to correct the "Strategy of Development of Agricultural Machine Construction up to 2020", plans of measures, monitoring of financial and economic state of the producers of the agricultural machinery in Russia;

2) to prepare and to approve the plan of the realization of the contest of the perspective R&D works concerning modern cars and equipment for the Russian agriculture, providing its realization on the basis of the principles of the private and state partnership;

3) to prepare the Provision on the organization of the realization of the public tests of the agricultural machines (concerning the comparative ones), keeping a data bank judging from the results and the provision of the free access to them;

4) to offer suggestions concerning the centralized data base for the goals of the realization of the analysis of the Russian park of the agricultural machinery;

5) to take part in the development of the project of the technical regulations of the Customs union "Concerning the safety of tractors, agricultural machinery and forestry machinery" [10].

Realization of these goals will allow to the agricultural machine construction of Russia up to the year 2020 to become a highly technological industry of the national economy, possessing modern enterprises, producing competitive in the international market agricultural machines, that will be in a great demand in the number, composition and quality, sufficient for the provision of the national food security and the increase of the export deliveries.

Realization of the strategy will allow to Russian and local producers of the tractors by year 2020 to have the volume of output of 50 000 tractors per year. Simultaneously in the country the production of the components of the leading specialized companies will be created. Russian companies are expected to be transformed into global players. Agricultural producers will get the access to the trailer and hinged machines and other equipment, adjusted to local agricultural and climatic conditions.

Only under these conditions the development of the industry of the agricultural machine construction will provide considerable changes in the social and economic sphere, will positively tell on the economic security of the country, population employment and the level of its salary.

Problems and prospects of the development of the largest in the South of Russia of the harvest factory "Rostselmash" under the conditions of WTO are the following. The limited partnership "Harvester factory "Rostselmash"" is the strategically important for the South of Russia and the whole country producer of the agricultural machinery. The factory controls more than 50% of the market of the crop harvesters in Russia and about 17% of the world market. The production of "Rostselmash" is supplied into more than 20 foreign countries.

The company consists of 13 enterprises with industrial sites in Canada, Russia, USA, Ukraine and Kazakhstan. "Rostselmash" produces the agricultural machines of 24 types, more than 150 models and specifications (crop harvesters, forage harvesters, tilling machines, sprayers, tractors and so on). During the latest decade new owners of the "Rostselmash" have increased the assortment, dealer nets, fastened the positions in the world market.

"Rostselmash" has been ranged the first in the list of the innovative activity of the southern business. The factory invests into scientific research that in 2010, for instance, made up 37 million rubles.

Year 2011 happened to be successful enough for the company. When in 2011 the earnings of the main structure of the group Limited Partnership " Rostselmash" fell down for a third, to 10 million rubles, the agricultural machinery market in Russia in 2011 grew from 3856 to 5426 items and the share of the harvesters' constructors from Don reached in different sectors from 50 till 60%.

"Rostselmash" in 2011 in comparison with 2010 increased the production of crop harvester by 1,5 times, the production of the tractors for the agriculture and forestry by 1,7 times. The turnover of the company 2010–2011 grew by 1,9 times [8].

"Rostselmash" company, undoubtedly took steps for the preparation for Russia's WTO joining. During latest years the enterprise was actively strengthening its positions in the world market. In 2007 the company finished the purchase of the stocks of the Canadian tractor fac-

tory "Buhler Industries Inc." and in 2009 acquired the equities of American companies "Red Ball" and "Feterl Manufacturing Corp", in 2011 bought the assets of the Canadian machines producer "Ezee-On". Today almost 40% of the production of the industrial holding "Novoye Sodrzhestvo" (New Community), to whom the "Rostselmash" belongs is located in the Northern America.

Besides the purchase of the stocks of foreign companies, "Rostselmash" was actively developing new foreign markets. Together with the established sales circuits into the Baltic countries, Bulgaria, Moldavia, Kazakhstan and Ukraine, the company is now selling the machines to Poland, Hungary and Turkey. Trying to diversify its risks and not to depend on the basic market and among 400.000 of machines 10–15% are exported.

With all this going on the factory has been actively extending the range of goods. In 2008 the harvester ACROS that replaced "Don-1500" was put into serial production and today the forth model of this machine is designed. In 2009 a rotor harvester of the seventh generation TORUM appeared: this model should be a competitor to powerful harvesters of transnational players and to enter foreign markets, including the north American one. In the beginning of 2012 the establishment of a new varnish and paint workshop in Rostov-on-Don was announced that in many aspects was supposed to help the export as the previous quality of the harvester painting did not allow its delivery abroad.

And yet the potential of the fall of the market share of "Rostselmash" was underestimated. Already in may 2012 the number of the harvesters sold was 20 times lower than in may 2011. And in June 2012 the management of the factory declared a compulsory interruption in work. The main reason became the problem of the sales of the agricultural machinery. The total number of the unsold production made up 1.800 units.

One of the main reasons of the changes in demand in the market of the agricultural machinery under the conditions of WTO became the expectations of landowners that customs duties for the used foreign agricultural machines will be reduced from 15% till 5%. It is the inflow of the worn out agricultural machines that can reduce the share of the national agricultural machines in Russia from 52% in 2011 up to 12% in 2015 and up to 30% by the year 2020. More-

over the obligations of the Russian Federation before the WTO anticipate the decrease of the level of the state support of the agricultural sphere from 9,9 billion \$ till 4,4 billion \$ by the year 2018 and will limit the export support. This period seems to be the most difficult one for national factories of the agricultural sphere [8; 11].

Meanwhile the agricultural producers require from the national machine construction the most highly technological machines that in many indices corresponds to international standards. These machines can be bought in foreign companies especially those that have their own production in Russia.

Being one of the largest players of the national agricultural machine construction, "Rostselmash" has always been an active part in the dialogue with both regional and federal the authorities. Thus, the product, created by transnational companies for the export into any country of the world is the result of their efficient interaction with the government and banking systems that allows for example to the countries of the European union to give the machinery on credit for 10 year at a low percent.

In December 2008 having dismissed 1,3 thousand workers, the management of the holding "Novoye sodruzhestvo" (New Community) has already risen question about the necessity of the state support of the industry in the whole and the Rostov factory in particular. After the visit of the Rostov site by the President of the Russian Federation V.V. Putin in January 2009 a nine month import duty on some types of harvesters at the amount of 15% of the customs value but not less than 120 euros per 1 kilowatts of the established engine capacity was set that allowed to "Rostselmash" increasing considerably the profit. However a temporary but not a systematic character of the support showed that the Government of the Russian Federation is concerned about the social function of this firm in the region one as a city forming one.

Situation in the second part of 2012 became similar. The enterprise attracted the attention to them only when they declared about the prospects of mass dismissal. For region where the discharge of 2.500 workers in Taganrog Car Factory created a precedent and increased the social tension it was a serious problem.

In the frame of the mediated state support the leasing and some loan schemes can be found out. In 2011 about 70-75% of the "Rostselmash" sales were realized using credit lines and





through the channels of "Rosagroleasing" this number was about 10% of the machines. In 2012 the share of "Rosagroleasing" made up about 25% of the sales volume of "Rostselmash". Such distribution in the sales structure was connected in particular with the fact that in 2012 the program "Rosagroleasing" concerning the renovation of the machinery of agricultural firms took place. By the date 26 June 2012, 575 items of the equipment produced by "Rostselmash" were bought to be sent for renewal of the machinery in agricultural firm in the frame of the program of the renovation at the amount of 2,5 million rubles [8].

The results of the year 2013 showed the volume of production in "Rostselmash" made up 14,1 billion rubles. In total 3179 harvesters, 236 tractors and 67 sprayers were produced. In the course of an active modernization of the production in the enterprise a modern sawing and logistic complexes were established and a system of the dealer net was offered.

Today the enterprise is attached to the "regional principle of the design and assembly of the machines" i. e. harvesters are produced in accordance with a special order for every region. An approximate cost of this harvester is about 6 million rubles [6].

In the authors' opinion, the building up of the sustainability of "Rostselmash" under the conditions of WTO will be provided only when the factory will grow from a production concern into a technological company. For this it should be more actively involved into the processes that are taking place in the world machine construction: composite revolution, revolution in the sphere of the introduction of new production technologies and robot techniques. Without the investments into new technologies it is impossible to pretend to occupy stable positions in the world market. For that purpose it is needed to provide state support, export programs and an efficient, adjusted to the conditions of the WTO economic and industrial policy.

The largest mistake that was made by the management of the company at the preparation of Russia to WTO joining are a short term planning and taking tough "anticrisis" measures. As a matter of fact, such measures are typical of the enterprises with an inefficient management and they are taken in the course of the problems connected with the delivery. Such wrong measures are the mass dismissal of the workers and the optimization of the production, reduction of the production volumes, reduction of the

prices for the sold production. In the long term such measures will not give a desired effect but, most likely will contribute to the disappearance of such enterprises from the market.

Meanwhile "Rostselmash" with its more than 10% share in the world market is an international company. And if the factory can develop efficient production clusters, allowing to save up costs and to launch the programs of technical modernization it will be able to strengthen its positions.

Thus, the leader in agricultural machine construction in the South of Russia, the harvest factory "Rostselmash" happened to be one of the first Russian enterprises in a historically new situation. If the competition with a cheaper and used foreign machinery becomes sensible, it is possible to expand the situation according to the scenario when "Rostselmash" will not develop the Russian site and will take care of its north American projects and quite independent assets. In this case "Rostselmash" is transformed into a middle sized company, having a large but efficient production in Russia and other countries [12; 13].

Another scenario is also possible: a tripartite union with the state and banks at which the factory has good chances to become a equal TNC among the largest specified ones. The WTO joining has shown the limit over which the market is actually is finished. From this situation the factory will be either a valuable world player or a middle sized Russian firm.

Conclusion and prospects of further of research. In 2013 in Russian agricultural complex the reduction of the total volume of the sales of the basic types of the agricultural machines was observed as a consequence of the reduction of the effective demand from the part of the producers of the agricultural production generated by the fall of the efficiency and high debt burden.

The same year the government of the Russian Federation took the decision of the funding from the federal budget of the costs of the agricultural producers at the amount of 15% of its price. The total volume of payments in 2013 made up 430 million rubles. In 2014 these steps are supposed to be backed by 2 billion rubles. There exists another additional mechanism of support concerning the allocation of the funds via the state company "Rosagroleasing". In 2013 the recapitalization of this company took place and its chartered capital grew up at the amount of 2,2 billion rubles. It is important



to notice that the largest part of these funds was assigned for technical and technological modernization of agriculture.

In 2013 the receipts of Russian agricultural enterprises at the international market made up about 200 million US dollars. It is a decent result taking into consideration the fact that Russia has just started to settle in this market, i.e. there is a potential for the sales increase and, what is the most important, there remains the interest from the part of foreign partners [6]. It is obvious that national production in this sense has become competitive but Russian producers need to act in a more active way, to promote its production, using all the available opportunities including the resources of Vnesheconombank, Russian agency in Export Credits Insurance and "Rosagroleasing".

In 2012 the Ministry of the Agriculture of the Russian Federation lead comparative trials of different types and classes of national and foreign machines presented in the Russian market. They proved that modern examples of national tractors and harvesters have technical and economic parameters comparable to foreign brands and in some positions even exceed them.

That's why Russian enterprises not only of agricultural machinery but also of the whole machinery construction under new conditions have to be oriented on technological reequipment of general machinery enterprises at the cost of the automation of the processes of design and construction of the car constructing production, use of progressive methods of the construction materials processing the details' surface and metal constructions, mechanization and automation of construction processes, development of modern methods of control and diagnostics of details and hubs in the process of the production and exploitation.

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Митрофанова І. В., Митрофанова І. А., Іванов Н. П.
Проблеми і перспективи інноваційного розвитку в рамках СОТ сільськогосподарського машинобудування в Росії.

У статті обґрунтовано необхідність технічної модернізації сільського господарства, розкрито розрізнені ризики функціонування підприємств сільськогосподарського машинобудування в Росії на прикладі компанії «Ростсельмаш» (Південний федеральний округ Росії) аналізуються проблеми і обґрунтовуються перспективи розвитку цієї базової для регіонів Півдня Росії галузі в рамках виконання вимог Світової організації торгівлі (СОТ), членом якої Росія стала в 2012 р.

Ключові слова: сільськогосподарське машинобудування, Південь Росії, СОТ, спеціалізація, «Ростсельмаш», ризики, витрати, інновації, державна підтримка, модернізація.

Митрофанова И. В., Митрофанова И. А., Иванов Н. П.
Проблемы и перспективы инновационного развития в рамках ВТО сельскохозяйственного машиностроения в России.

В статье обосновывается необходимость технической модернизации сельского хозяйства, раскрываются риски функционирования предприятий сельскохозяйственного машиностроения в России; на примере компании «Ростсельмаш» (Южный федеральный округ России) анализируются проблемы и обосновываются перспективы развития этой базовой для регионов Юга России отрасли в рамках выполнения требований Всемирной торговой организации (ВТО), членом которой Россия стала в 2012 г.

Ключевые слова: сельскохозяйственное машиностроение, Юг России, ВТО, специализация, «Ростсельмаш», риски, издержки, инновации, государственная поддержка, модернизация.

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