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The development of e-commerce in Russia and Kazakhstan[1]

Abstract. *The relevance of the article topic is due to the provision of e-commerce new development prospects for business in the form of savings on transaction costs, the possibility of access to global markets without the need for on-site presence. This article is devoted to a comparative analysis of the development of e-commerce in Russia and Kazakhstan. The analysis is conducted on such basic indicators of the UNCTAD report «B2C E-commerce Index» as the prevalence of the Internet, the reliability of the mail, the development of non-cash payments and the level of security of servers. Each indicator is analyzed in more detail, using data from national statistics agencies of the countries in question and other international organizations. The results of analysis identified barriers to the development of e-commerce in Russia and Kazakhstan. In order to eliminate the identified barriers, the authors have made relevant recommendations, the implementation of which involves the consolidation of efforts of these countries to create and improve conditions for the development of e-commerce within the EAEU. The results of the study may be of interest to the Eurasian Economic Commission in addressing the implementation of the EAEU Digital Agenda, as well as to the relevant national government agencies of Russia and Kazakhstan. The direction of further research is determined by the possibility of expanding the scope of the analysis to all EAEU countries.*

Keywords: *e-commerce, Eurasian Economic Union, Eurasian Economic Commission, Internet prevalence, server security, small and medium enterprises, online transactions.*

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Introduction

E-commerce provides significant opportunities for the sale of goods and services, as it allows to bring the produced goods to new consumer markets without significant capital investments. These advantages of e-commerce in relation to the usual types of entrepreneurial activity put it in the category of the most dynamically developing branches of business [1].

The e-commerce market has no geographical boundaries, and its subjects have to function in almost the same conditions. However, the ongoing processes of enlargement of the e-commerce market in the EAEU countries are increasingly creating difficulties for new local companies, especially small ones, to enter the market. The measures taken today by the governments of these countries to develop the infrastructure of information and communication technologies as part of the implementation of projects for the digitalization of national economies have helped to increase demand for e-commerce services and products. At the same time, local entrepreneurs are under pressure from foreign Internet suppliers [2]. In this regard, the EAEU member states need to create conditions for increasing the level of competitiveness of local e-commerce entities. In this regard, it is difficult to overestimate the role of states in consolidating efforts to stimulate their activity in the e-commerce sector, as well as to create a single e-commerce market on the territory of the EAEU. From this point of view, the analysis of the state of e-commerce in these countries, as well as the identification of barriers and the definition of development prospects are relevant and timely.

Methodology

The study implemented a comprehensive approach to the analysis of the e-commerce market, based on general scientific research methods, which include methods of comparative analysis, generalization, systematization, the method of empirical research. The study of e-commerce markets in Russia and Kazakhstan was carried out by analyzing the market conditions and dynamics of e-commerce market development in these countries; the analysis of B2C E-commerce Index, published by the UN Conference on Trade and Development (UNCTAD). To identify barriers to the development of e-commerce, on the four main indicators of the Index a more in-depth analysis was carried out through the use of secondary data. The information and empirical base of the study consisted of official data from the national statistical authorities of Russia and Kazakhstan, data from the National Bank of Kazakhstan and the Central Bank of Russia, UNCTAD reports, and materials from other international agencies specializing in global monitoring of e-commerce development and information and communication technologies.

Discussion

According to Statista's global research, the global e-commerce market size in 2020 will

Table 1

The volume of the e-commerce market in Russia, Kazakhstan and the world, in billion US dollars

	2016	2017	Growth rate, %	2018	Growth rate, %	2019	Growth rate, %	2020	Growth rate, %	Growth rate 2020/2016, %
Russia	15,17	19,97	132	21,59	108	27,46	127	33,84	123	223,1
Kazakhstan	0,68	0,8	118	0,68	85	0,86	126	1,42	165	208,8
World	1845	2304	125	2934	127	3460	118	4280	124	232,0

Note: compiled from data of the National Statistics Bureau of the Agency for Strategic Planning and Reforms of Kazakhstan, Federal State Statistics Service of the Russian Federation, Statista Data Platform.

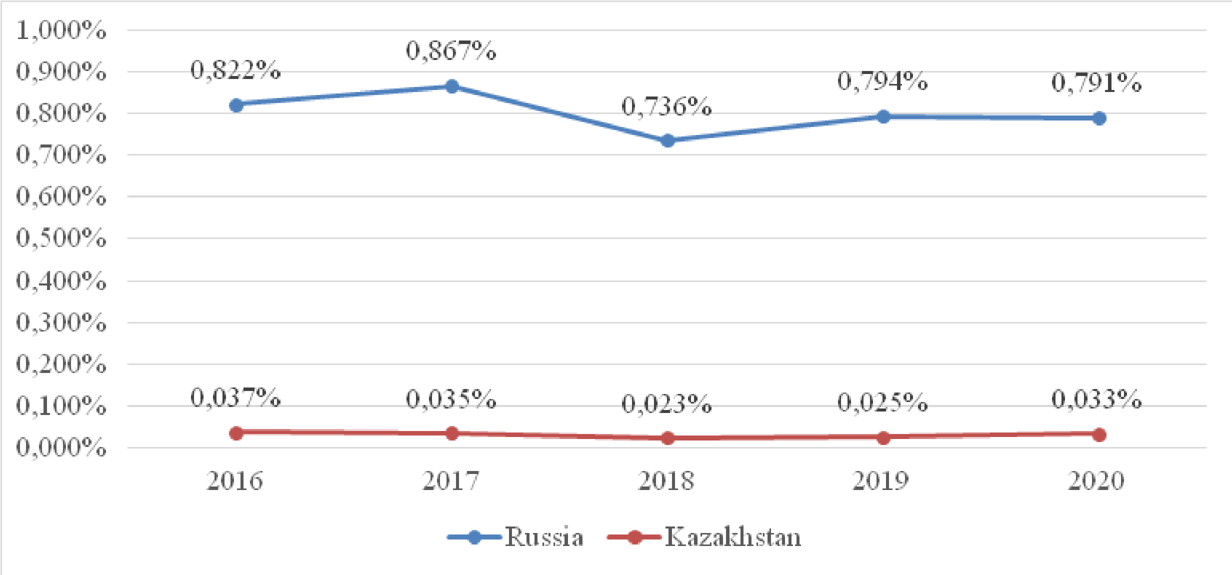


Figure 1 – Change in the share of Russia and Kazakhstan in the global e-commerce market in 2016-2020

increase by more than 2.3 times compared to 2016 [3]. At the same time, it is very difficult to talk about the rapid acceleration of the growth rate of the global market in question: our calculations show that they fluctuate in the range of 118%-125% in 2017-2020. The T-Adviser agency estimates the Russian e-commerce market at $33.84 billion in 2020, an increase of 23% over 2019 [4]. The pandemic had a more significant impact on the e-commerce market of Kazakhstan - the growth is 65% (Table 1).

According to the data of Table 1, in the considered period the basic growth rate of Kazakhstan and Russia markets noticeably lags behind the world level. This trend hinders the growth of the share of the countries in question in the global e-commerce market (Fig. 1).

Over the past 5 years, the share of global retail e-commerce in total global retail sales has been growing steadily. At the same time, a sharp increase in the share of retail e-commerce in total retail sales happened in 2020, precisely during

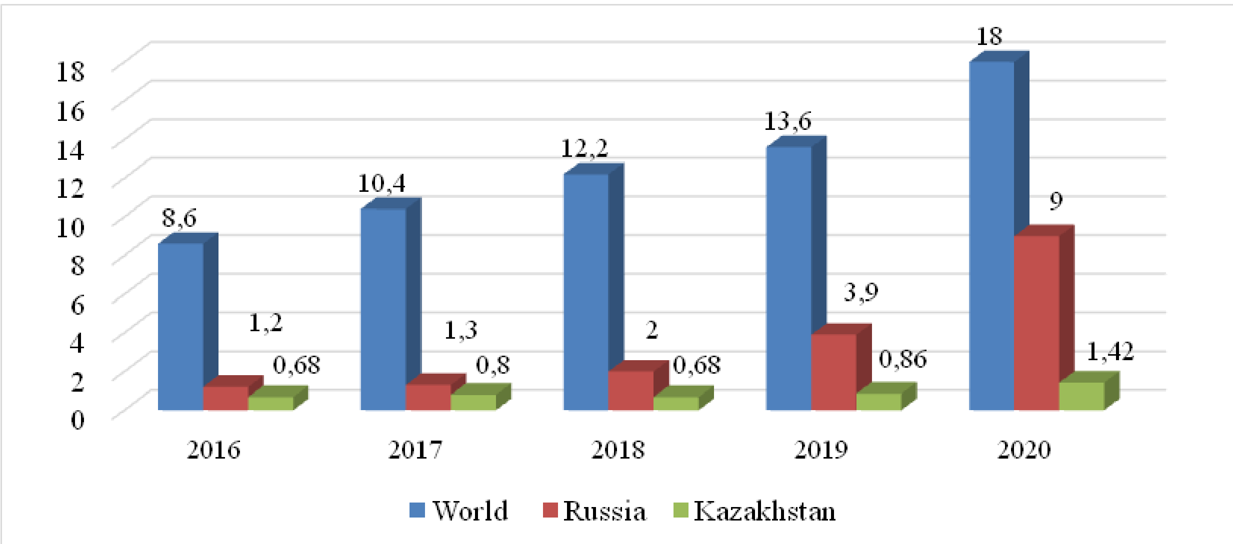
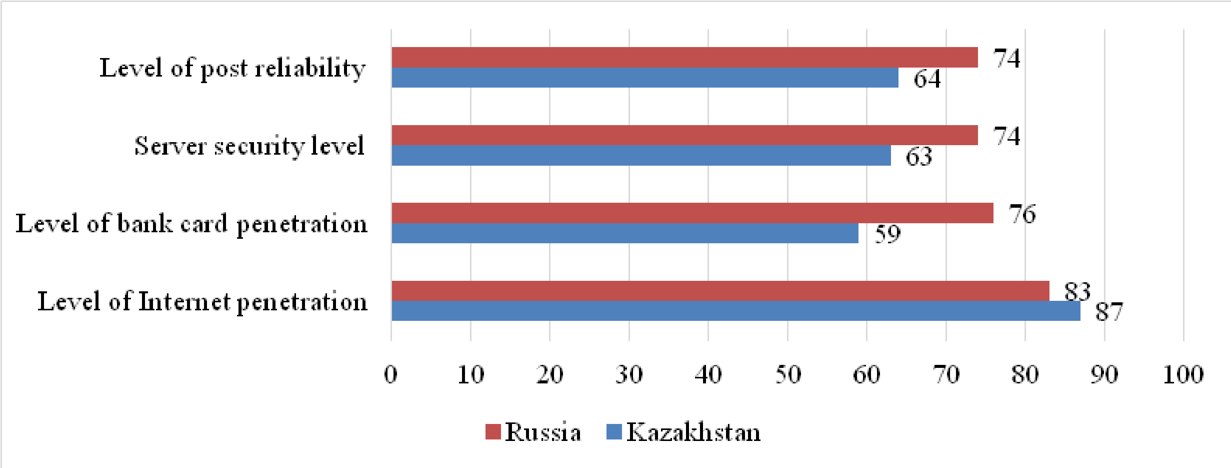


Figure 2 – Share of retail e-commerce in total retail sales, in %



Note - compiled from the source [4]

Figure 3 – Kazakhstan and Russia in the UNCTAD B2C E-commerce Index 2020

the onset of quarantine restrictions related to the Coronavirus pandemic. The same trend can be seen in Russia and Kazakhstan: the studied indicator at the global level increased from 13.6% in 2019 to 18% in 2020, in Russia - from 3.9% to 9%, in Kazakhstan - from 0.86% to 1.42% respectively (Fig.2). As we can see, according to this indicator both countries are noticeably behind the global level, which indicates a rather low level of e-commerce penetration in the B2C sector in Russia and Kazakhstan.

According to the UNCTAD report «B2C E-commerce Index», Kazakhstan and Russia belong to the category of countries with a high level of readiness for e-commerce in the B2C sector. The index consists of four indicators: the level of Internet penetration, the number of secure servers per 1 million people, the spread of bank cards and the level of reliability of the postal system. The values of each indicator are in the range from 0 to 100, i.e. reflect the level of each indicator out of 100 possible [5].

In the 2020 UNCTAD B2C E-commerce Index, Russia and Kazakhstan are ranked 41st and 60th, respectively, among 152 countries. Figure 1 shows Russia's and Kazakhstan's performance on the components of this index.

According to the figure, the level of Internet penetration in the countries under consideration is quite high. According to this indicator, Kazakhstan is on a par with such countries as the USA, Israel, the Czech Republic (87%), and is ahead of Japan (85%), Poland (80%) and Italy (76%). The achievement of such high indicators by Russia and Kazakhstan was made possible by the implementation of the Strategy for Information Society Development-2030 of the Russian Federation, the State Program «Information Society» of the Russian Federation, «Information Kazakhstan-2020», «Digital Kazakhstan». Meanwhile, in both countries there is a problem of digital divide between cities and rural areas [6]. This is largely due to the low population density in the remote regions of these countries. Currently, 1.1 thousand rural settlements in Kazakhstan, where more than 130,000 people live, do not have access to the Internet [7]. In Russia, 2 thousand settlements with a population of 500 to 10 thousand people and 6 thousand settlements with a population of 250 to 500 people do not have broadband access to the Internet [8]. At present, work on bringing the Internet infrastructure in the regions continues in both countries. The implementation of these activities plays a paramount role in increasing demand for electronic shopping, as currently remote regions of Kazakhstan do not have access to high-speed networks, respectively, are deprived of opportunities to make online purchases.

The development of a non-cash payment system significantly affects the level of development of e-commerce, as the main tool for payment for purchases are bank cards [9,10]. According to the B2C E-commerce Index 2020, the level of distribution of bank cards in Kazakhstan is estimated at 59 points out of 100, in Russia - 76 points out of 100.

According to the National Bank of Kazakhstan and the Central Bank of Russia, in Kazakhstan there were 244 bank cards for every 100 people in 2020, in Russia - 203. At the same time, the share of non-cash payments in Kazakhstan was 67.4%, in Russia - 70%. If before the COVID-19 pandemic the main driver of the non-cash market was systematic development of the payment infrastructure of banks and fintech companies, then in the second quarter of 2020 additional impetus to the development of non-cash form of payments was given by restrictive measures of social distancing. Citizens began to order more and more online. At the end of 2020, Internet transactions prevail in the structure of non-cash payments in both countries: in Kazakhstan their share is 81%, in Russia - 78.8%.

According to the B2C E-commerce Index 2020, according to the subindex of the number of secure servers per 1 million inhabitants, Russia and Kazakhstan scored only 74 and 63 points, respectively, out of a possible 100. According to UNCTAD, 72% of all countries have already adopted legislation to combat cybercrime [11]. There is no such law in Kazakhstan, but the fight against cybercrime is regulated by Articles 205-213 of the Criminal Code of the Republic of Kazakhstan and other by-laws. In 2018 the cybersecurity program «Cyber Shield of Kazakhstan» was launched, which is designed until 2022 [12]. In Russia, Federal Law No. 187-FZ «On the Security of Critical Information Infrastructure of the Russian Federation, the Federal Law «On Information, Information Technology and Information Protection» and others are in force. Despite the measures taken, there are still areas of activity that require regulation by states. For example, in both countries a large part of the population in order to save money uses unlicensed software. Moreover, even commercial organizations neglect to buy licensed software. Here it is advisable to set high fines in the case of the use of such software by legal entities. With respect to individuals, the use of fines is not an effective tool because of the low purchasing power of a significant share of the population. As measures of indirect influence it is possible to recommend actions on increase of computer literacy of the population. The existing training centers are oriented to the needs of entrepreneurs. For informational coverage of the majority of the population, it is necessary to place periodic social training videos on the types of Internet fraud and precautionary measures on popular television channels.

The logistics and delivery coordination is important for the development of e-commerce [13]. In this regard, compared to Kazakhstan, Russia has a more developed network of postal systems: in the UPU ranking, Russia is in the list of twenty countries with a developed postal system, while Kazakhstan ranks 52nd among 170 countries [14]. Both the world's largest companies (DHL) and large local companies with rich experience and reputation (KazPochta, Alem Tat and others) are present on the Kazakhstan market. A large national postal service operator in Kazakhstan, Kazpochta JSC is implementing several projects as an active participant in e-commerce. However, the speed of application processing and delivery of Kazakhstan postal services is quite inferior to China postal services. This is largely due to the backlog of local Posts in terms of innovation and process automation. In addition, postal services in Kazakhstan are not financially responsible in case of delayed delivery of goods, etc. The lack of fierce competition in the market for postal services in Kazakhstan significantly hinders the development of this market.

The world practice of e-commerce development has shown that its positive dynamics is mainly due to the development of electronic trading platforms, which will allow businessmen to save money on creating a site, the introduction of non-cash payment systems, delivery services and other things [15]. Their convenience lies in the formation a full range of services for both entrepreneurs and consumers on a single site

- it is information about the product and seller, methods of payment, methods of obtaining goods or services, quality control and feedback from both sides [16].

Results

These days there are no competitive marketplaces like Amazon or Alibaba in Russia and Kazakhstan. At the same time, in Russia the number of marketplaces with high potential is growing, although many of them have foreign content (Ozon, eBay, Aliexpress/Tmall, etc.) or are specialized (Wildberries, Lamoda, etc.). In this regard, measures can be taken in two directions:

- Creating conditions for the emergence of their own powerful marketplaces in the countries in question, including within the Eurasian Economic Union;

• introduction of restrictive measures in relation to the activities of foreign marketplaces by increasing customs duties.

On the first direction, first, it is necessary to revise approaches to logistics, to develop networks for the delivery of goods and expand the range of banking services. An important task is the development of transport and logistics infrastructure, here we need a clear regulation of the storage centers. The existence of such centers will significantly reduce delivery time, reduce transport costs, build outsourcing of logistical processes with private courier mail, online stores, and electronic sites, in general simplify business for small and medium-sized enterprises.

The greatest potential as a base for creating marketplaces are wholesale-distribution centers, which carry out wholesale trade in food products. Creation of marketplaces on their basis will allow subjects of electronic commerce to save on the creation of a site, implementation of non-cash payment system, delivery service, to provide conditions for the sale of certain types of agricultural products through the organization of processes of acceptance, processing, primary processing, packaging, proper storage, veterinary and phytosanitary quality control, wholesale trade, including the use of automated electronic information and settlement systems. Here the experience of China and Uzbekistan, which by regulating the activities of wholesale distribution centers, provided an opportunity to create marketplaces on their basis (Taobao and Agrosale.uz), is illustrative.

No less important is the strengthening of the institution of consumer protection and the introduction of comprehensive measures to protect consumer rights in the sphere of electronic commerce. It is necessary to amend the relevant regulatory documents to make it possible to equate the rights of the Internet buyer with the rights of the traditional buyer. In addition, to ensure the transparency of purchases and reduce risks, it is necessary to update the use of «cash on delivery», meaning the amount of money that the post office charges the buyer of goods on behalf of the seller. This tool is already used in Kazakhstan as a payment tool for non-cash payments; it is common practice in "Kazpochta". However, it is difficult to talk about its widespread use. Therefore, it is necessary to carry out explanatory work on its recognition as one of the types of non-cash payment instruments.

The issue of improving digital literacy of entrepreneurs is essential. Currently, the National Chamber of Entrepreneurs of Kazakhstan provides training in basic digital skills through the service support for doing business «Going Business Online». In addition, specialized centers that provide service support to entrepreneurs in the area of e-commerce have been created on the basis of Kazpochta JSC in the cities of Nur-Sultan, Almaty and Karaganda. In Russia, there are many such programs, many of which are implemented by the Entrepreneurship Support Fund of the Russian Federation.

All of the above measures are aimed at strengthening the readiness of infrastructure and entrepreneurs to work on specialized e-commerce platforms. However, the creation of such marketplaces is in the interests of the private sector, which can make a high margin on this. If we see such a marketplace as a kind of e-commerce ecosystem, then we must realize that e-commerce develops actively only in existence of this system. And the emergence of this ecosystem requires huge investments, which are expressed in millions of dollars. In the absence of such an ecosystem, states usually use tariff regulation [17]. For example, to protect the EAEU domestic market, customs duty rates on goods received from abroad were increased. Previously, buyers could avoid customs clearance of a postal parcel if its value was less than 500 euros per month. As of January 1, 2019, that threshold was lowered to 200 euros per parcel. The threshold is expected to be lowered to 50 euros by early 2021 and to 20 euros by 2022. At the same time, the amount that exceeds this norm is subject to a duty of 15%. Taxation of postal items is a standard world practice. In the EU, a low threshold is 22 euros, above which VAT is payable. In India, it is only $1. But India's market is very capacious compared to the EAEU market, so further reduction of the low postage threshold in the EAEU is not advisable. For example, it is unprofitable for large marketplaces to trade in countries where the threshold for non-taxable postage is very low. Therefore, in order to save money, companies prefer to set up business in the country, investing billions of dollars in the country's economy to do business, with one caveat - if the market is attractive enough and the capacity of the market is large, as in India.

While the EAEU market as a whole has not formed a global-level marketplace, local entrepreneurs need to enter the existing global platforms to sell domestic goods outside the EAEU. This is especially important for small and medium-sized enterprises.

First, the cost of doing business online is much higher for them in the absence of the necessary domestic infrastructure, since they are forced to outsource activities related to payment, delivery, return, accounting and the resolution of disputes.

Secondly, the small size of Kazakhstan's market does not allow e-commerce projects to scale. For these reasons, it is important for domestic companies to become part of the global e-commerce ecosystem by entering global markets. Alibaba offers an opportunity from this point of view. However, the complexity of its marketing and specifics of work requires certain skills from business entrepreneurs. In this regard, the state through its development institutions and programs can support the initiative of including domestic enterprises in this platform as suppliers, by providing legal and advisory assistance.

Regarding mutual e-commerce between Russia and Kazakhstan within the EAEU, two main problems can be identified. The first problem concerns the issue of double conversion, when the national currency is converted into the dollar, and from the dollar already into another national currency. According to the Eurasian Economic Commission, this double conversion results in a loss of at least 2% of total sales. The problem can be solved by introducing a standard requiring banks to treat transactions in national currencies between EEU member states as domestic transactions to avoid double conversion, and by unifying rules for international payment systems in the EEU for cross-border transfers in currencies of EEU member states without double conversion to currencies of third countries.

The second problem is the lack of mutual recognition of certificates, intellectual property licenses and other documents that are necessary to supply goods to one or another country of the Union.

Finally, the third problem is the attempt of the countries in question to tighten administration in terms of personal data and biometrics. This circumstance poses a threat to the development of e-commerce. Therefore, it is necessary to work out unified rules of consumer rights protection and unified rules of regulation on the platform of the Eurasian Economic Commission. This will allow citizens of all EEU countries to buy from online stores in any EEU country.

Conclusion

The following conclusions can be summarized from this study:

1. Due to the cross-border nature of e-commerce, some countries may receive more benefits from the development of e-commerce, while others may suffer losses from the accompanying degradation of traditional trade. To avoid becoming one of the latter, government intervention in e-commerce is necessary. At the same time, the regulation should be aimed

at equalizing the competitive conditions for foreign and domestic suppliers, creating the necessary infrastructure of e-commerce, as well as stimulating entrepreneurial activity of domestic enterprises in the sphere of e-commerce by providing tax benefits and other support measures.

2. Effective development of e-commerce depends on such factors as telecommunications infrastructure and data transmission availability, the level of digital literacy of the population, consumer protection, legislation, the level of logistics infrastructure, and the development of cashless payment instruments.

3. Despite Russia and Kazakhstan being classified as Despite Russia and Kazakhstan being classified as countries with a high level of e-commerce readiness by the UNCTAD B2C E-commerce Index, there are the following problems with e-commerce infrastructure: lack of access to high-speed Internet networks in remote regions; lack of significant competition in the postal services market. In addition, both countries have problems with the logistics infrastructure, which is due to the large dispersion of the population in the countries.

4. The results of the study showed that in Russia and Kazakhstan the growth potential of the e-commerce market is not fully used: the share of retail e-commerce in the overall structure of retail trade in Russia is only 9%, in Kazakhstan - 1.7%, while the global average level is 18%.

5. Creation of own specialized e-commerce platforms promotes its active development, so it is important in this context to create the necessary conditions for the emergence of their own powerful marketplaces in the countries under consideration within the EAEU. Equally important is the introduction of restrictive measures in relation to the activities of foreign suppliers through tariff regulation.

6. The need to integrate small and medium-sized companies in Russia and Kazakhstan into global e-commerce platforms like Alibaba is dictated by the fact that outsourcing activities related to payment, delivery, return, accounting of goods and dispute resolution for small and medium-sized companies increases the cost of doing business online and makes them uncompetitive. Since Kazakhstan's market is not capacious enough, it does not allow e-commerce projects to scale. Inclusion in the global supply chain will allow them to reduce transaction costs and increase market reach without a sales presence in the country. Given the lack of necessary digital skills among entrepreneurs, states need to support them in the form of advisory and legal assistance to enter major marketplaces.

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Развитие электронной коммерции в России и Казахстане

Аннотация. Актуальность темы статьи обусловлена предоставлением электронной коммерцией новых перспектив развития для бизнеса в виде экономии на транскционных издержках, возможности доступа к глобальным рынкам без необходимости присутствия на месте. Настоящая статья посвящена проведению сравнительного анализа развития электронной коммерции в России и Казахстане. Анализ проводится по таким основным показателям отчета ЮНКТАД «B2C E-commerce Index», как распространенность интернета, надежность почты, развитость безналичных платежей и уровень защищенности серверов. При этом по каждому показателю проводится более развернутый анализ, охватывающий данные органов национальных статистик рассматриваемых стран и других международных организаций. Результаты анализа позволили выявить барьеры развития электронной коммерции в России и Казахстане. Для устранения выявленных барьеров авторами даны соответствующие рекомендации, реализация которых предполагает консолидацию усилий этих стран в части создания и улучшения условий для развития электронной коммерции в рамках ЕАЭС. Результаты исследования могут представлять интерес для Евразийской экономической комиссии при решении задач по реализации Цифровой повестки ЕАЭС, а также для профильных национальных государственных органов России и Казахстана. Направление дальнейших исследований определяется возможностью охвата анализом всех стран ЕАЭС.

Ключевые слова: электронная коммерция, Евразийский экономический союз, Евразийская экономическая комиссия, распространенность интернета, безопасность серверов, малые и средние предприятия, онлайн-транзакции.

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Ресей және Қазақстандағы электрондық коммерцияның дамуы

Аннотация. Мақала тақырыбының өзектілігі электрондық коммерцияның трансакциялық шығындарды төмендету және жаһандық нарыққа тікелей қатысусыз қол жеткізу мүмкіндіктерін бере отырып, бизнес үшін жаңа бағдарлар ашуымен түсіндіріледі. Мақала Ресей және Қазақстан елдеріндегі электрондық коммерцияның дамуына салыстырмалы талдау жүргізуге арналған. Талдау ЮНКТАД ұйымы «B2C E-commerce Index» есебінің негізгі көрсеткіштері (интернеттің таралуы, пошта сенімділігі, қолма-қолсыз төлемдердің дамығандығы және серверлердің қорғалғандығы) бойынша жүргізілген. Оған қоса, осы көрсеткіштердің әрқайсысы бойынша қарастырылып отырған елдердің ұлттық статистика органдарының және басқа халықаралық ұйымдардың мәліметтерін қолдана отырып, анағұрлым тереңірек талдау жүргізілген. Талдау нәтижелері Ресей мен Қазақстандағы электрондық коммерцияның даму кедергілерін анықтауға мүмкіндік берді. Айқындалған кедергілерді жою мақсатында авторлар жасаған ұсыныстар осы елдердің ЕАЭО аясында электрондық коммерцияны дамыту үшін жағдайлар жасау және жақсарту бойынша күш-жігерді біріктіруді меңзейді. Зерттеу нәтижелері ЕАЭО Цифрлық күн тәртібін іске асыру міндеттерін шешу барысында Еуразиялық экономикалық кеңес үшін, сондай-ақ Ресей мен Қазақстанның бейіндік мемлекеттік органдары үшін қызығушылық тудыруы мүмкін. Әрі қарай зерттеулердің бағыты талдаумен ЕАЭО-ның барлық елдерін қамтумен анықталады.

Түйін сөздер: электрондық коммерция, Еуразиялық экономикалық одақ, Еуразиялық экономикалық комиссия, интернеттің таралуы, серверлердің қорғалғандығы, шағын және орта кәсіпорындар, онлайн-транзакциялар.

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