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INTEGRATION PROCESSES IN THE ENERGY SPHERE OF EURASIA: FEATURES AND PROSPECTS

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Abstract. In a world where the process of globalization in all sectors of human activity is developing at a steady pace, the energy sphere attracts particular attention as one of the most important global problems of the modern world. This importance is due to the fact that the energy factor, both in the interrelations of individual countries and regions, and on an international scale plays a decisive role in the development of political relations. In this regard, the article discusses the role of the energy factor in the framework of the Eurasian Economic Union. Achieving economic integration is closely related to the energy integration of the region and one of the components of the energy integration complex is the formation of common markets for oil, gas and oil products. Thus, the study examines the features and potential of the oil and gas markets of the EAEU member countries, as well as the problems and challenges that need to be solved for the formation of energy integration. The article analyzes the characteristics of the integration of world energy markets and the problems of ensuring energy security, as well as the analysis of the characteristics of the development of regional energy markets in Russia, Kazakhstan and the Republic of Belarus. The article attempts to predict the trends of their development and to identify the prerequisites for the formation of the Eurasian energy space.

Key words: Energy factor, energy cooperation, energy security, the Eurasian Economic Union, energy integration, energy resources, regional energy market.

Еуразияның энергетика саласындағы интеграциялық үдерістері: ерекшеліктері мен келешегі

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Андапта. Адам өмірінің барлық салаларында жаһандану үдерісі тұрақты қарқынмен дамып келе жатқан әлемде энергетикалық сала қазіргі уақыттағы ең маңызды ғаламдық мәселелердің бірі ретінде өзіне ерекше назар аудартады. Бұл маңыздылық, жекелеген елдер мен аймақтар арасындағы қарым-қатынаста да, халықаралық ауқымда да энергетикалық фактордың саяси қатынастарды дамытуда шешуші рөл атқаратындығына байланысты. Осыған байланысты мақалада Еуразиялық Экономикалық Одақ шеңберінде энергетикалық фактордың рөлі талқыланды. Экономикалық интеграцияға қол жеткізу аймақтың энергетикалық интеграциясымен тығыз байланысты және энергетикалық интеграциялық кешеннің құрамдас бөліктерінің бірі мұнай, газ және мұнай өнімдерінің ортақ нарығын қалыптастыру болып табылады. Осылайша, зерттеу ЕАЭО-ға қатысушы елдердің мұнай-газ нарығының ерекшеліктері мен әлеуетін, сондай-ақ энергетикалық интеграцияны қалыптастыру кезінде шешілуі қажет мәселелер мен сын-тегеуріндерін қарастырады. Мақалада әлемдік энергетикалық нарықтар интеграциясының сипаттамалары және энергетикалық қауіпсіздікті қамтамасыз ету проблемалары,

сондай-ақ Ресей, Қазақстан және Беларусь Республикасындағы аймақтық энергетикалық нарықтардың даму сипаттамалары талданады. Мақала олардың даму тенденцияларын алдын ала болжауға және Еуразиялық энергетикалық кеңістікті қалыптастырудың алғышарттарын анықтауға тырысады.

Түйін сөздер: энергетикалық фактор, энергетикалық ынтымдастық, энергетикалық қауіпсіздік, Еуразиялық экономикалық одақ, энергетикалық интеграция, энергиялық ресурстар, аймақтық энергетикалық нарық.

Интеграционные процессы в энергетической сфере евразии: особенности и перспективы

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Аннотация. В мире, где процесс глобализации во всех отраслях жизнедеятельности человечества развивается уверенными темпами, особое внимание привлекает энергетическая сфера как одна из важнейших мировых проблем современности. Такая значимость обусловлена тем фактом, что энергетический фактор как во взаимосвязях отдельных стран и регионов, так и в международном масштабе играет определяющую роль для развития политических отношений. В связи с этим в статье рассматривается роль энергетического фактора в рамках Евразийского Экономического Союза. Достижение экономической интеграции тесно связано с энергетической интеграцией региона и одна из составляющих комплекса энергетической интеграции – формирование общих рынков нефти, газа и нефтепродуктов. Таким образом в статье изучаются особенности и потенциал нефтегазовых рынков стран-участников ЕАЭС, а также проблемы и вызовы, требующие решения при формировании энергетической интеграции. В статье проводится анализ особенностей интеграции мировых энергетических рынков и проблем обеспечения энергетической безопасности, а также анализ особенностей развития региональных энергетических рынков России, Казахстана и Республики Беларусь. В статье делается попытка спрогнозировать тенденции их развития и выявить предпосылки формирования евразийского энергетического пространства.

Ключевые слова: энергетический фактор, энергетическое сотрудничество, энергетическая безопасность, Евразийский экономический союз, ЕАЭС, энергетическая интеграция, энергоресурсы, региональный энергетический рынок.

Introduction. An integral part of economic integration is energy integration, as the availability of energy is the most important factor in the industrial development of any country. The need for reliable and stable energy supply makes energy security one of the most important problems facing the world community in the 21st century. Energy security is the level of protection of state economies from external threats. The countries-oil importers after the “oil shocks” of the 70s of the last century, under the term “energy security” understand the reliability of “security of supply” at a reasonable price. At the same time, oil-exporting countries, whose economy is completely dependent on oil revenues, are directly concerned about the stability of their sales markets.

The economic and social development of mankind is directly dependent on reliable, stable and adequate energy supply. We are witnessing ever-increasing energy consumption, especially pronounced in dynamically developing regions

of the world with a large population. In addition, high, but subject to sharp fluctuations in the price of oil, gas and petroleum products also put at risk the process of stable development of the world economy. In addition to this, the gradual depletion of the resources of the North Sea, which today meet the needs of European countries, and the rapidly growing demand in other countries will lead to significant changes in the sources of energy supply on a geographic scale in the coming years. (Kokoshin A. A., 2012).

In this context, since global energy consumption is largely dependent on fossil resources, especially oil and gas (and these resources are mainly concentrated in the Middle East and the Caspian basin), export outlets with different routes and security of energy supply, through uninterrupted energy supply, become an important issue on a global scale. Various sources of energy resources and their transportation routes are directly related

to the geopolitical and geo-economic interests of European countries, since the European Union is the largest consumer of hydrocarbons. Today, 60% of oil used by the European Union is exported from outside, of which 29% is imported from post-Soviet states, mainly Russia, Azerbaijan and Kazakhstan.

Large-scale changes occurring in the global energy markets at present, globalization of the global energy space, growing energy demand and, as a result, increased competition between regional energy markets predetermine the need to create a common Eurasian energy space in order to ensure the region's energy security, reliability and continuity of supply hydrocarbons, the development of joint anti-crisis programs. The need to create a unified system for ensuring energy security is also associated with an increasing dependence on oil exports and a shortage of energy resources (Kulbatyrov N., Tulepbekova A., 2014)

Literature review. Energy integration of the Eurasian space today is one of the sought-after research topics. A large number of various scientific and analytical works, articles, memoirs, monographs of domestic and foreign authors are devoted to this topic. In this series, first of all, it is necessary to single out the Kazakhstani school of Eurasian studies, which was formed at the Department of International Relations and World Economy of the Al-Farabi Kazakh National University.

In general, scientific and theoretical approaches to the study of problems of integration are based on the understanding of global processes. The formation of the EAEU as a subject of global geopolitics cannot be studied outside the global system of international relations. Moreover, an appeal to the conceptual basis of Eurasian integration leads to fundamental works in the field of geopolitics, economics and energy cooperation. These problems were considered in the works of well-known domestic and Russian experts, including: Movkebayeva G. (Movkebayeva, 2017) dedicated number of researches to the study of the energy factor in the development of integration process of the EAEU. The author also identified the main principles in the formation of common markets of oil, gas and petroleum products; Zhiznin S.Z. (Zhiznin, 2013) analyzes in detail the aspects of energy diplomacy and the importance of the energy security; the monograph of Voronin A.Yu. and Malikova O.I. (Voronin, Malikova, 2010) discusses the features of the influence of the processes of globalization of energy markets and the expansion of energy exports on the economic situation in the Russian Federation. Particular attention is paid to the global financial and economic crisis.

The article of Kulbatyrov N. and Tulepbekova A. (Kulbatyrov, Tulepbekova, 2014) gives a definition of trends and the specifics of formation of the energy space of the SES member countries on the basis of deepening of regional economic integration. They analyze the features of integration of global energy markets and energy security issues, as well as the characteristics of development of regional energy markets of Russia, Kazakhstan and Belarus.

In the article of Mastepanov A.M. (Mastepanov, 2015), he analyzes the impact of the geopolitical factor and big politics on the energy policy of Russia and the leading players, discusses the issues of their energy interaction and cooperation. The thesis is proved that in the new geopolitical conditions, mutually beneficial energy cooperation remains the fundamental way to solve energy problems and ensure energy security.

Parkhomchik L.A. (Parkhomchik, 2015) devoted his report to key aspects of the interaction of the countries of the Eurasian continent in creating new and developing existing energy-transport corridors, especially highlighting the role of the Caspian region. He analyzes the current situation of energy corridors and sub-corridors and discusses the top priorities for the Caspian region.

The western bibliography plays a significant role in the study of the economic-energy cooperation of the Eurasian states but only in the general framework, while the problems and challenges that face the region are still in need of explanation. Nevertheless, there are still appropriate researches in the field as G. Fabio and D. Yergin. G. Fabio (Fabio, 2014) asks whether Europe's energy policy can serve as an example for the Eurasian Economic Union. Daniel Yergin is one of the most authoritative experts in the field of energy issues, he believes that modern relations between exporting countries and importing countries are largely based on interdependence and cooperation (Yergin, 2005).

Materials and methods. The subject of the article was disclosed on the basis of general scientific methods of knowledge, using an interdisciplinary approach. Functional, systemic, logical, and institutional methods of analysis were applied in the course of the study. The study of the theoretical provisions of the development of integration is carried out using comparative analysis and synthesis. The theoretical basis of the study was the works of domestic and foreign scientists on various aspects of the problem of the development of integration, in particular in the field of energy security. Combining various methods allows for a comprehensive analysis of the integration problems of the Eurasian Economic

Union. The multifaceted nature of the problems raised in the article requires varying methodological approaches; in this regard, historical, statistical, comparative and factor analysis are used in the work. Particular attention is paid to the content analysis of official documents and materials of the EAEU and the member countries affecting the subject of the study.

Results and Discussion. The power of the Eurasian Economic Union as the main tool of regionalization. Globalization, which was considered as the main trend of international development only a few years ago, is being replaced by a powerful regionalization – as a response of states to an unstable, saturated with risks and threats external environment. Adapting and seeking to find answers to the emerging challenges, states form fundamentally new mechanisms and principles of interaction based on the paradigm of international economic integration. The establishment of economic integration as a new and dominant form of cooperation between countries similar in their structure is determined by the desire for economic growth, stability, economic and energy security.

Serious and deep processes connected with economic integration are taking place today in the Eurasian space – the Eurasian Economic Union (EAEU) has been formed and is developing. Eurasian integration began as a desire of integrating economic and political communities to find points of stable development in order to determine their own way to overcome global instability. In this sense, Eurasian integration was an attempt to offer an answer to the challenge created by history (Mastepanov A. M., 2015).

Today the EAEU produces about 4% of world GDP, has a share of 4% of world industrial production, lives on its territory 5.5% of the world population (about 200 million people), and the territory itself is the largest economically integrated region in the world 20 million square kilometers. On the totality of indicators, this organization is the second integration association in the world after the EU, and in addition, is a capacious and growing market. Countries included in the EAEU differ in the intensity of economic growth and the level of macroeconomic development (Table 1).

Table 1 - GDP at PPP of the EAEU countries in 2014 (worldbank.org).

State	GDP at PPP, billion USD	GDP per capita, USD
Russia	3 745,1	25 635,9
Kazakhstan	418,4	24 204,7
Belorussia	172,2	18 184,9
Kyrgyzstan	19,4	3 322,2
Armenia	24,3	8 077,5
Totally / average EAEU:	4379,4	15 885,0

At the same time, it is necessary to remember that the principles of macroeconomic regulation in the EAEU space remain similar. The EAEU states, as well as the CIS countries that are not currently members of the EAEU, have a common history and cultural code, were twice integrated first in the Russian Empire, and then the Soviet Union. The region has developed unique economic, logistical, cultural, social and

political ties, a single national economic complex was created. The rupture of these ties led to a drop in production in all post-Soviet republics. We also note that the sectoral structure of the economies of the EAEU countries such as the Russian Federation, Belarus and Kazakhstan remains generally similar, but in Armenia and Kyrgyzstan, the share of agriculture in the GDP structure is higher (Table 2).

Table 2 - Sectoral structure of GDP of the EAEU countries in 2014, (%), (worldbank.org).

State	Agriculture	Industry	Services
Russia	3,9	36,3	59,8
Kazakhstan	4,6	36,0	59,4
Belorussia	8,9	42,4	48,7
Kyrgyzstan	17,3	26,7	56,0
Armenia	21,9	30,4	47,7

The countries of the EAEU have a powerful potential in the energy sector. The EAEU accounts for 20% of world reserves and production of natural gas and 25% of world exports of natural gas, 20% of world coal reserves and 6% of its

world production, 7% of world oil reserves and 15% of its production and export, 21% of world reserves of uranium and 43% of world uranium production, 5% of world electricity production (Table 3).

Table 3 - Energy reserves in the EAEU countries (BP Statistical Review of world Energy-2015, WNA Report).

State	Oil reserves, billion tons.	Gas reserves, billion cubic meters	Coal reserves, billion tons	Uranium reserves, thousand tons
Russia	14,1	32,6	157,0	480
Kazakhstan	3,9	1,5	33,6	710
Belorussia	0,05	-	-	-
Armenia	-	-	-	-
Kyrgyzstan	-	-	-	-

The share of the fuel and energy complex in the EAEU countries' GDP is 17%, the share of the fuel and energy sector in the industrial production of the EAEU is about 33%. This potential is the basis for the integration process; therefore, integration into the EAEU began precisely as an energy one. However, today the states of the EAEU and the entire post-Soviet space have faced both common problems for the entire world economy and very specific challenges.

Problems and Challenges of the EAEU at the current stage

Among the special challenges facing the EAEU states are the lack of competitiveness of their economies, high dependence on the energy sector, as well as on imports. Thus, the Russian economy today forms about 3.6% of world GDP, but in the structure of technological products only about 2.7% (Готовский А., 2015). Over 70% of Russia's exports are resources, and more than half of imports are high-tech goods. Moreover, the largest percentage of imports from the total mass of the relevant market is observed in the sector of production of means of production and in the component sector, that is, Russia has a high share of imports in the intermediate product, which shows a significant, over 36%, dependence of Russia on technology imports (Березинская О., Ведев А., 2015).

A similar situation is observed in Kazakhstan, which is also oil exporter. Over the years, the share of revenues from the oil industry in the budget of Kazakhstan has constantly grown, today in the consolidated budget of Kazakhstan it accounts for about 44% of all revenues. At the same time, the oil

and gas complex of Kazakhstan is still not able to fully cover the country's own energy needs, which makes it necessary to import oil products from Russia and a number of other countries (Laumullin M., 2016).

Among the challenges is also the formation of a new energy structure in the leading countries of the world. This structure creates new opportunities and new risks for energy markets and leads to a gradual transition from the energy market to the market technology and services in the energy sphere. It also causes a slowdown in global economic integration, reduces the growth rate of the world economy and energy, and contributes to the transition from "resource globalism" to a combination of technological globalization and regional energy self-sufficiency.

The volatility of energy prices and the slowdown in the growth of world energy markets, taking into account the above, put additional pressure on the economies of the EAEU states. Thus, with the fall in world oil prices in 2014-2015, the GDP of the Russian Federation showed negative gains: at the end of 2014 – about 0.1%, and at the end of 2015 – negative values at the level of 3-4%.

Due to the high level of pressure on the economies of the EAEU countries during the global economic crisis and the general negative background, including geopolitical, indicators of mutual trade in Russia, Belarus, Kazakhstan, Armenia and Kyrgyzstan are also contradictory. However, despite the absence of a pronounced tendency to increase, it is impossible to talk about the decline in mutual trade (Mastepanov A.M., 2015). It should be noted a high share of energy products in mutual trade, as well

as a significant increase in trade in non-food consumer goods (see Tables 4 and 5). The sanctions regime imposed by a number of foreign states has a significant negative impact on Russian indicators. However, it should be emphasized here that the dynamics of the national currency exchange rates contribute to the decrease in imports and support exports in almost all EAEU states.

The current foreign policy situation, a complex of threats and challenges are pushing the states of the EAEU to form corresponding answers to them. Today, there is a unique opportunity to make a breakthrough transition from a model based on the use of resources to innovative use of them for the development of the economies of the EAEU countries, and this transition can only be carried out as part of the integration process.

Integration process of the EAEU: its potential and perspectives

The neo-institutional type of integration model assumes an initial focus on certain sectors with the expectation that successful integration of these sectors will lead to the development of integration, first adjacent and associated sectors of the economy, and then in others. Obviously, the energy industry, according to which the EAEU has a truly significant competitive advantage on the world stage, should become the basis of industrial cooperation, turning the insufficiently effective transfer of oil and gas revenues into value added finite technological goods, provided with investments. This will significantly improve the efficiency of the manufacturing industry, which, in turn, will create prospects for filling the domestic market with domestic goods (Table 4).

Table 4 - Eurasian Economic Commission, Department of Statistics

The main indicators of the development of mutual trade of the member states of the CU and the CES in 2013-2014											
Year	CU and CES – total	Including:									
		Belorussia			Kazakhstan			Russia			
		Bln. USD	% to the corresponding period of the previous year	Bln. USD	% to the corresponding period of the previous year	Unit weight, in % to the total for the CU	Bln. USD	% to the corresponding period of the previous year	Unit weight, in % to the total for the CU	Bln. USD	% to the corresponding period of the previous year
2013	64,5	95,1	17,7	103,5	27,4	5,9	95,3	9,2	40,8	91,8	63,4
2014	58,5	90,7	16,0	90,7	27,4	6,4	108,7	11,0	36,0	88,1	61,6

Thus, an anti-inflation spiral can be formed, prerequisites for the growth of welfare, and hence prerequisites for overcoming the listed systemic problems, can be created. That is, energy, which

plays a crucial role in the economies of the EAEU member states, will continue to play it in the foreseeable future (in the medium term, inevitably, in the long term, with a high probability) (Table 5).

Table 5 - Eurasian Economic Commission, Department of Statistics

Volumes of mutual trade of the member states of the CU and CES by type of goods in 2014			
	Bln. USD	in % to the total	in % to 2013
Total	58,5	100,0	90,7
From which:			
Investment goods	5,6	9,7	85,8
Intermediate goods, including:	36,5	62,4	85,3
energy products	15,2	26,0	82,7
other intermediate goods	21,3	36,4	87,3
Consumer products, including:	15,2	26,0	107,0
consumer food products	6,7	11,4	100,5
consumer non-food items	8,5	14,6	112,8

The presented logic indicates the place of energy integration in the process of global positioning of the Eurasian community. The energy industry, according to which the EAEU has a really significant competitive advantage, should become the basis of industrial cooperation, turning the oil and gas transfer into the added value of the final technological goods.

Integration of the EAEU in this case will receive incentives for deepening and, accordingly, new perspectives in the global world.

Energy integration involves the creation of a single Eurasian Energy Space (EES). The purpose of the EES is to ensure the sustainable energy development of the member states. The key elements of the EES are the formation of a single legal field, common energy markets, as well as the joint use and development of a common transport and energy infrastructure (synergies).

All EAEU states declare their interest in energy cooperation. At the present, the gas markets of the EAEU countries are undergoing major changes and transformations, focused mainly on overcoming the infrastructural constraints and intensifying interstate natural gas trade. The EEC initiated work on the creation of a common gas market of the countries of the Eurasian Economic Union by 2025, and in 2015 the Concept of its phased formation was already prepared.

It implies not just the growth of trade or investment interrelations at the state or corporate level, but a transition, to one degree or another, to general rules of regulation and to at least partially opening up domestic markets (in the area of supply to consumers) for economic entities of countries participating in integration (Fabio Genoese, 2014). The formation of a common gas market of the EAEU will be carried out in stages and on the basis of the following key principles:

1. It is the elimination of customs duties and other factors hindering mutual trade;
2. The parties proceed from the priority provision of domestic gas needs of the member states and ensuring environmental and energy security;
3. Domestic gas prices and tariffs for transportation services will be set in accordance with the laws of the Member States;
4. Gas standards should be unified;
5. Finally, the parties agreed to create an information exchange system on the fundamental indicators of the gas industry.

Such approach will contribute to increasing gas consumption as an effective and environmentally friendly source of energy for electricity and heat generation. However, in addition to opening

domestic markets, the development, adoption and implementation of a comprehensive EAEU Program on the use of natural gas and the development of its deep processing are required.

Thus, natural gas will be in demand in the markets and provided with stable demand not only as fuel, but also as a resource for the processing industry producing high value-added products. At the same time, the price of gas for consumers within the EAEU, due to the growth of production volumes and the development of infrastructure, can be kept low, which will reduce the cost of industrial production and energy costs.

In the oil industry, the most important is the issue of interaction between Russia and Kazakhstan as two oil-producing countries of the EAEU. Russia and Kazakhstan should act not as competitors in the global energy market, but as partners. The project to create common oil markets in the EAEU is currently at the development stage.

A comprehensive EAEU Program for the development of deep oil refining should be developed. By analogy with the gas sector, the use of oil as fuel should be combined with highly efficient refining, whose products have high added value and are in demand in the markets of the EEU countries and the world market.

Conclusion

On the territory of the EAEU, one fifth of the world's uranium reserves is concentrated. In view of the fact that within the framework of the development of the EAEU, the formation of a common electricity market is expected by 2019, it is advisable to create an atomic energy commission of EAEU-Atom based on the experience of Euratom, which will be part of the EAEU Agency for Energy Integration and Atomic Energy. Integration in the field of nuclear energy is designed to promote the peaceful use of nuclear energy, joint decision-making in the nuclear industry, the formation of a unified energy policy, increasing the stability of nuclear energy, ensuring control over nuclear energy, and conducting research and development in the field of nuclear energy. It seems that the creation of joint ventures should be the most important area of energy cooperation. Moreover, the basis for this kind of cooperation is already there: joint ventures of the Russian Federation and the Republic of Kazakhstan – the joint venture Nuclear Stations, the joint venture Akbastau, the joint venture Uranium Enrichment Center (Bolkunets D.V., 2014).

The successful implementation of energy integration and the creation of the Single Energy Space of the EAEU will lead to a strong increase in energy production, boost investment and cash flows within the EAEU, and increase the availability of energy for consumers. It is important that energy integration will have a positive impact on the social sphere: first of all, because of the development of the industry, numerous jobs will be created, including in remote and underdeveloped regions of the EAEU

states. A rather high level of education of the EAEU labor resources, taking into account the possible expansion of the integration association, is a strong advantage. On a macroeconomic scale, the generation of large profit streams in the Single Energy Space will make it possible to redistribute and use these funds across the entire EAEU for investment in other industries, R&D, and innovation development. Starting from the energy sector, the integration process will spread to all sectors of the economy and the life of citizens.

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