**Ayniyatdan xulosa chiqarish kerak emas**

Ayniyat nima degani o’zi? Ayniyat bu tarif bo’yicha doim to’gri degani.

Misol uchun, daromadimiz jamg’arma va xarajatlarimiz yig’indisiga teng. Lekin hech qachon biz xarajatlarimizni ko’paytirsak daromadimiz ko’payadi deb aytmaymiz, to’g’rimi?

Buning barchasi nimani nima keltirib chiqarishiga bog’liq. Misol uchun, xarajatni ko’paytirish mazkur xarajatlarni qoplash uchun ko’proq ishlashga majbur qilar yoki kamroq jamg’arma qilarman.

Quyida makroqitisodiy ayniyatlarga ikkita misol:

1. Y = C + I + G + X - M. Shuning uchun davlat xarajatlarini ko’paytirish YaIMni oshiradi.

2. Y = C + S + T. Soliqlarni ko’paytirish YaIMni oshiradi.

Ko’pincha muhokamalarda birinchi holat ko’p eslanadi. Shuni aytish kerakki, har ikkala fikr ham noto’g’ri.

Just as we never reason from a price change, we must never reason from an accounting identity. My income equals my savings plus my consumption: I = S + C. But we would never say that if I spend more money, that will cause my income will rise.

It all depends on what caused the change. In my income example, more spending could cause me to work more to cover those expenses. Or I could save less. It depends. In the GDP example, we need to know what caused the change in net exports (or any other part of the equation). We need to be explicit about what caused the change in net exports. Exports don’t simply fall from the sky, and move up and down based on our wishes. We need to know the causes.

Did we discover a new fracking technology? Net exports will likely go up, as will GDP. Did we impose tariffs on imports from China? Those are likely inputs into other production processes and, therefore, lower “US gross domestic production,” aka GDP. Therefore, the tariffs cause an increase in net exports, but they cause a decrease in GDP. The reason is that the first mover— the cause of tariffs— pushed up NX, but it also at the same time pushed down something else, such as the C in C+I+G+NX. To say GDP moves up if net exports move up requires an assumption the C, I, and G are not changing.

For basically any macroeconomic example we are interested in, holding C, I, and G fixed is a ridiculous assumption. We need to think about is all affected by a certain cause. Luckily, [as I’ve explained before](https://www.economicforces.xyz/p/does-density-increase-housing-prices), economics helps us establish causation.

Economics—whether theoretical or empirical—helps us establish causal claims about the world. If X changes, then Y changes. If you prefer the framing of counterfactuals: If X had been different, then Y would have been different.